Alfabet

Designing Guide Pages for Alfabet

Alfabet 10.15

Conventions used in the documentation

Convention	Meaning
Bold	Used for all elements displayed in the Alfabet interface including, for example, menu items, tabs, buttons, dialog boxes, page view names, and commands. Example: Click **Finish** when setup is completed.
Italics	Used for emphasis, titles of chapters and manuals. this Example: see the *Administration* reference manual.
Initial Capitals	Used for attribute or property values. Example: The object state Active describes...
All Capitals	Keyboard keys Example: CTRL+SHIFT
File > Open	Used for menu actions that are to be performed by the user. Example: To exit an application, select **File > Exit**
< >	Variable user input Example: Create a new user and enter <User Name>. (Replace < > with variable data.)
(i)	This is a note providing additional information.
⊟	This is a note providing procedural information.
👁	This is a note providing an example.
⚠	This is a note providing warning information.

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Chapter 1:   Introduction to the Guide Pages Designer

This reference manual describes in detail how to design and administrate start pages for the user community using the Guide Pages Designer. The Guide Pages Designer is a tool that allows you to create and design start pages to support your user community in navigating their way to specified functionalities in the Alfabet solution. The start pages have the look-and-feel of an Internet Web page and may include links to Alfabet functionalities and documents, embedded reports, pictures, and informational text. The guide pages and guide views that you configure in the Guide Pages Designer serve as an alternative to the standard start page provided by Alfabet BD GmbH.

When a user accesses Alfabet, the configured start page will be displayed in the main viewing area of the Alfabet interface. Each start page that you configure should contain all necessary links to functionalities and information for the user profile it is assigned to so that users can carry out the tasks in Alfabet that they are responsible for.

Users can click the browser's Back button to return to the previous view or click the **Home Page** button in the standard Alfabet toolbar to return to the start page from anywhere within Alfabet. The standard methods for opening links in a new browser window or browser tab apply to the guide pages.

The **Express Mail View** and **Create Bookmark** functionalities are available for guide views thereby allowing links to guide views to be sent via an email notification and to be bookmarked.

The following can be displayed in the start pages configured with the Guide Pages Designer.

- Links to functionalities and configured reports in Alfabet

- Standard views and configured reports embedded in the start page

    > A configured report embedded in or linked to a guide view/guide page will be accessible via the user profile that the guide page project is assigned to, regardless of the authorization defined for the configured report.

- Text providing necessary information or instructions for users

- Links to documents, Web resources, or the online help

- User information with the following information:

    - A hyperlinked text that informs the current user about his/her open assignments and provides direct navigation to the **My Assignments** functionality

    - A hyperlinked text that informs the current user about the workflow steps that he/she is responsible for as the responsible user or proxy user. The link provides direct navigation to the **Workflow Activities** functionality

    - A hyperlinked text that informs the current user about the collaboration topics that he/she has initiated or been invited to and provides direct navigation to the **My Collaborations** functionality

    - A hyperlinked text that informs the current user about the number of Microsoft Teams® meetings due at the current date that he/she has initiated or been invited to via the Alfabet user interface. The link provides direct navigation to the **My MS Teams Meetings** functionality.

- Configured search field that allows users to search for objects in the Alfabet database. The search field relies on a configured report to search for objects. After the user enters the search criteria and clicks the search button, the configured report displaying the objects matching the search criteria will be

displayed in the main viewing area. The search field is available in the standard Alfabet toolbar during the entire user session.

There are two possibilities when configuring start pages:

- **Guide View**: A guide view can be configured to look like a Web page and provides the most flexibility when configuring a start page. You can specify a background color or background image for the entire view or for a section of the view, the placement of texts, images, and links as well as the captions, height, color, and alignment of headers and texts. Application links, internal links, external links, help links, or document links can be specified for pictures and texts. Furthermore, a link can be configured that opens the user's email program and fills the **To** field with a predefined email address. Guide views have been introduced with Alfabet release 10.0 in order to provide more control and flexibility than guide pages in terms of the layout and visualization of the content rendered in the browser and are the preferred method of configuration.

- **Guide Page**: A guide page provides a means to configure a start page with a predefined layout of elements. A navigator menu that is displayed on the left with application links that directly open a specified Alfabet functionality or that open a topic page that is displayed in the right pane. The topic page may display a title, text, images and hyperlinks to functionalities, documents, Help, configured reports as well as URLs. The structure of the view and placement of images and texts is predefined. The guide page configuration is available for backward compatibility.

Each guide view and guide page must be assigned to a user profile in the context of the configuration tool Alfabet Expand or the **User Profile Administration** functionality in the Alfabet interface. If no guide view/guide page is assigned to a user profile, users will see the standard start page provided by Alfabet BD GmbH which contains a menu bar providing access to the functionalities available to the relevant user profile.

Please note that if a storyboard has been configured as the start page for a user, the storyboard will have precedence over the guide view/guide page configuration. If a user should see the guide view/guide page rather than a storyboard, you must ensure that he/she is not defined as a user in the **Use as Start Page** view of the storyboard. For more information about the configuration of story-boards, see the section *Working with Storyboards* in the reference manual *Getting Started with Alfabet*.

Guide views/guide pages are bundled in a guide page project. Only one guide page project can be implemented in the Alfabet solution at a given time and therefore the guide page project that you plan to implement should contain all guide views and guide pages needed for all relevant user profiles. You can create one or more guide views and guide pages for a guide page project. Only one guide view or guide page can be assigned to a user profile. A guide view or guide page can be assigned to more than one user profile if necessary.

In order to support barrier-free accessibility, Alfabet is compatible with the screen reader capability provided in conjunction with JAWS® for Windows® software. For an overview of the configuration required for barrier-free accessibility, see the section *Configuring Barrier-Free User Profiles* in the reference manual *Configuring Alfabet with Alfabet Expand*. For an overview of the keyboard shortcuts available in Alfabet, see the section *Barrier-Free Accessibility in Alfabet* in the reference manual *Getting Started with Alfabet*. Please note the following regarding the configuration of barrier-free accessibility for guide pages and guide views.

- For all elements created in a guide page project including the search field, top menus, application links, internal links, external links, help links, and document links, the **Caption** attribute should be configured so that a caption can be read for the element and the **Hint** attribute should be configured so that information relevant to navigation can be read. In the case of guide views, the tab sequence should be explicitly defined via the **Tab Order** button in the toolbar of the guide view designer or the **Tab Index** attribute available for each interface control in the guide view.

- The configuration of the welcome panel should allow texts to be read aloud by the screen reader capability provided in conjunction with JAWS® for Windows® software. Please note that the attributes **Welcome Name Text**, **Welcome Name Description**, **Welcome Name Tooltip**, **Logo Image Alt**, and **Welcome Name Picture Alt** are available for this purpose.

It is recommended that the content in the guide views/guide pages is written in English. The content will be extracted to the `MetaModel` vocabularies and can be translated to any secondary language currently supported by Alfabet. Translation is carried out in the configuration tool Alfabet Expand.

⚠️ Please note that the strings specified for guide pages will be extracted to the `GUIDEPAGES` vocabulary and the strings specified for guide views will be extracted to the `METAMODEL` vocabulary.

Custom strings for guide pages and guide views must be captured in English, regardless of the primary culture definition. All strings for captions for configuration objects and guide page/guide view content will be displayed in the `Original` column in the **Translation Editor** or XLSX files of the relevant vocabulary.

The Alfabet interface is available in the following languages:

Language	Locale ID
Arabic (Saudi Arabia)	1025
German (Germany)	1031
English (United States)	1033
French (France)	1036
Portuguese (Brazil)	1046
Polish (Poland)	1045

In order to provide guide pages to your user community, you should carry out the following steps, as needed:

1) **Conceptualize a guide page for each user profile in your user community.** Here you should consider what the needs of the user profile might be? For example, a management user profile may require immediate access to data, which could be a report that is embedded directly in a topic page and requires no additional navigation. A data entry user profile may require access to only a few functionalities but may require explicit instructions which can be provided directly in the topic page or available in a linked document. Another user profile may require access to many functionalities that are accessible by means of a

well-structured hierarchy of menu items. For more information about configuring user profiles, see the chapter *Configuring User Profiles for the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

2) **Create a guide page project.** For more information about the creation and handling of the guide page project, see the section Creating a New Guide Page Project.

3) **Create and configure the content of the guide views and/or guide pages**. For more information, see the chapters Configuring Guide Views and Configuring Guide Pages.

4) **Configure an optional top menu for the guide view and/or guide page**. For more information, see the chapter Configuring a Top Menu for a Guide View or Guide Page.

5) **Configure an optional search menu for the guide view and/or guide page.** For more information, see the chapter Configuring a Global Search Field for a Guide View or Guide Page.

6) **Save the guide views/guide pages to the Alfabet database** to implement them in the Alfabet solution. For more information, see the section Setting the Guide Page Project as Current.

7) **Assign the guide views/guide pages to the relevant user profiles** in the configuration tool Alfabet Expand. For more information, see the section Assigning Guide Pages or Guide Views to an Alfabet User Profile.

8) **Translate the content of the guide views/guide pages** to provide localized versions for the user community. For more information, see the section Creating a New Language Version.

The following information is available:

- Introduction to the Guide Pages Designer

- Accessing the Guide Pages Designer

- Working with Guide Page Projects

  - Creating a New Guide Page Project

  - Saving Changes to the Guide Page Project

  - Revising the Currently Implemented Guide Page Project

  - Opening an Existing Guide Page Project

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- Reviewing or Implementing the Guide Page Project in the Alfabet Solution

  - Setting the Guide Page Project as Current

  - Assigning Guide Pages or Guide Views to an Alfabet User Profile

  - Creating a New Language Version

  - Uploading the Guide Views/Guide Pages to the Production Environment

Chapter 2: Accessing the Guide Pages Designer

The Guide Pages Designer is accessible in the configuration tool Alfabet Expand.

⚠️ The Guide Pages Designer can only be accessed if the relevant license key is added to the server alias configuration of the Alfabet Expand application or of the Alfabet Web Application used to access Alfabet Expand Web. If your enterprise has purchased a license key for the Guide Pages Designer, the license key provided by Alfabet BD GmbH must be written into the field of the sub-tab **Key** of the **Licenses** tab in the server alias editor.

To open the Guide Pages Designer from Alfabet Expand Web, go to the URL http://<URL of the Alfabet Web Application>/Expand.aspx, log in to Alfabet Expand in your browser and click **Guide Page Designer**.

To open the Guide Pages Designer from the Alfabet Expand application, select **Managers** > **Guide Page Designer** in the menu of the application.
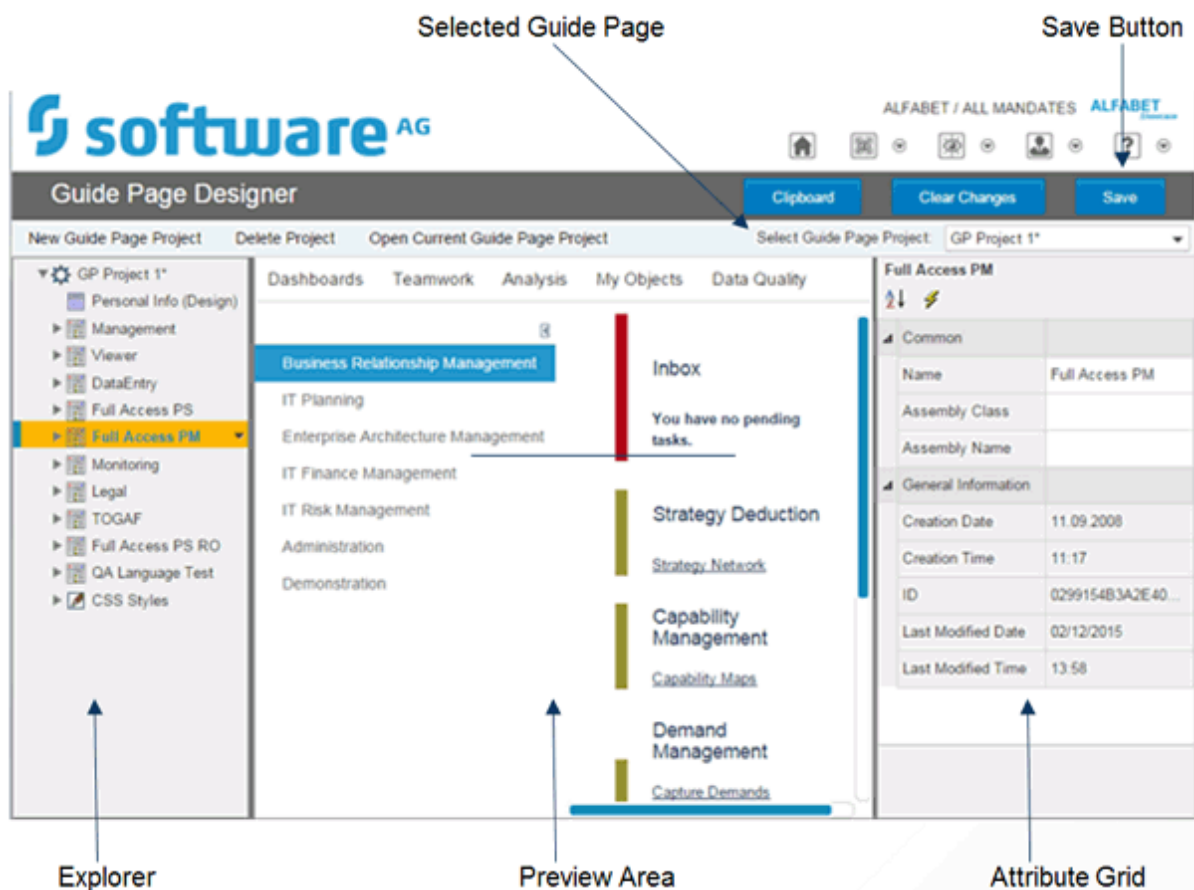
FIGURE: UPDATE interface of the Guide Pages Designer

The interface of the Guide Pages Designer displays a menu bar and the three main sections available for the purposes of configuration.

- The menu bar displays basic functions targeting the guide page project selected in the **Select Project** field (on the right side of the menu bar).

- The explorer on the left allows you to select the node that you want to work with. Click the arrow to the right of a node to access the functionality available for the mode. The explorer includes the following nodes:

- The guide page project ⚙ node. You can create new guide views 🖼 and guide pages 🔲 via the guide page project node.

- The **Personal Info (Design)** 🔲 node which allows you to design the visualization of all personal info topics added to guide pages in the guide page project. This node is only relevant for guide pages.

- The guide page 🔲 nodes. When you add a guide page to the guide page project, the nodes **Search Field** 🔍, **Top Menu** ⬜, **Welcome Panel** ⬜, and **Navigator Menu** ☰ will be automatically added below the guide page. You must only configure the nodes that are necessary to realize the design you have in mind.

- The guide view 🖼 nodes. When you add a guide view to the guide page project, the nodes **Search Field** 🔍 and **Top Menu** ⬜ will be automatically added below the guide view. You must only configure the nodes that are necessary to realize the design you have in mind. The guide view node allows you to open the guide view designer where you add various interface controls and define the visualization of the guide view.

- The **CSS Styles** 🖊 node which provides CSS style definitions 🖊 that you can use to specify the format and visualization of various aspects of the guide pages. This node is only relevant for guide pages.

- The preview area in the center pane visualizes the guide page that is being configured or the guide view that has been configured in the guide view designer.

- The attribute window on the right displays the attributes that can be defined for the node currently selected in the explorer pane.

- Above the attribute window section, click the **Switch to Categories** ⊟ button to view the attributes grouped in a way that helps you understand their purpose.

- The **Save** button displayed above the attribute window must be clicked in order to save any new or changed element of the configuration to the Alfabet database. The save action is described in more detail in the section Saving Changes to the Guide Page Project.

Chapter 3: Working with Guide Page Projects

The guide views and guide pages you implement in your Alfabet solution are designed in the context of a guide page project in the Guide Pages Designer. You can create one or more guide views or guide pages or a combination of guide views and guide pages for the guide page project. All guide views and guide pages configured for all user profiles are stored in one central guide page project. Although only one guide page project may be implemented in the production environment at a given time, other guide page projects may exist in the Guide Pages Designer that are obsolete or that you have created in order to revise or redesign your company's future guide pages.

The Guide Pages Designer provides a template structure to help you create a guide page project and configure its content. Although the guide views and guide pages are based on HTML5, as the designer you are not required to understand their HTML-coding. The structure of the guide pages is predefined by Alfabet BD GmbH. However, you can configure the content of the guide pages as well as change their look-and-feel according to your enterprise's requirements.

You can create one or more guide views and/or guide pages for a guide page project. Only one guide page project can be implemented in the Alfabet solution at a given time and therefore the guide page project that you plan to implement should contain all guide views and guide pages needed for all relevant user profiles. Only one guide view or guide page can be assigned to a user profile. Typically, a guide view or guide page is created for each user profile that requires a start page although you can assign a guide view/guide page to more than one user profile if necessary.

Please note that the **Update Meta-Model** functionality in Alfabet Expand creates and updates the runtime version of the guide page project only. If a design time version of the guide page is required, it must first be created and initialized via the **Open Current Guide Page Project** button in the toolbar of the Guide Pages Designer. For more information about updating the meta-model, see the section *Executing Administrative Tasks in Alfabet Expand* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The following information is available:

- [Creating a New Guide Page Project](#)

- [Saving Changes to the Guide Page Project](#)

- [Revising the Currently Implemented Guide Page Project](#)

- [Opening an Existing Guide Page Project](#)

- [Searching for Broken Links in the Guide Page Project](#)

- [Preventing the Rendering of the Preview Area](#)

Creating a New Guide Page Project

All guide pages configured for all user profiles are stored in one central guide page project. Although only one guide page project may be implemented in the production environment at a given time, other guide page projects may exist in the Guide Pages Designer that are either obsolete or that you have created in order to revise or redesign your company's current guide pages. When you create the guide page project, an initial guide page

with the caption **Guide Page** is automatically added to the guide page project by default and displayed in

the explorer with the icon. The **Guide Page** node is the first guide page in the guide page project.

To create a new guide page project:

1) In the Guide Pages Designer, click the **New Guide Page Project** button. A new guide page project

   is displayed in the explorer. The new project includes the **Personal Info (Design)** node, a guide page node, and a **CSS Styles** node.

2) Click the guide page project node to open its attribute window on the right and enter a technical name for the project in the **Name** field.

   The definition of the other attributes is described in the section Specifying the Visualization via the Guide Page Project Node.

3) Click the **Save** button to save the guide page project.

You can now create guide views and/or guide pages for your guide page project. For more information, see the following:

- Configuring Guide Views

- Configuring Guide Pages

Saving Changes to the Guide Page Project

Please note that you must explicitly save all configuration changes to the guide page project as well as interactions with the Alfabet database via the **Save** button. This includes creating or changing any element in the configuration as well as setting the guide page project as the current project in the Alfabet solution.

For example, to update the guide page project that is currently implemented in the Alfabet solution, you must save the changes made to the guide page project by clicking the **Save** button. Then you must click the **Update Guide Pages** button and then click the **Save** button again. For a detailed description about the steps required to review the guide view or guide page in the interface, see the section Setting the Guide Page Project as Current.

Revising the Currently Implemented Guide Page Project

In order to revise guide views and guide pages that are currently implemented in the Alfabet solution, you must first create a new guide page project in which you can work on the revisions. You can copy the existing guide views/guide pages to the new project, thus revising the copied guide views/guide pages without impacting those implemented in the production environment. When the revisions have been completed, you can save the guide page project to the Alfabet solution and replace the old guide views/guide pages with the revised guide views/guide pages.

To do so, create a new guide page project as described in the section Creating a New Guide Page Project. You should provide the new guide page project with a unique name and click the **Save** button. Next, click the **Open Current Guide Page Project** button and confirm the dialog that the current project will be overwritten by clicking **Yes**.

Make the revisions to the guide views/guide pages as needed. When you have completed this, save the guide views/guide pages and update them to the Alfabet solution as described in the section Setting the Guide Page Project as Current. The old guide view/guide page will be overwritten by the revised project.

Opening an Existing Guide Page Project

When you first open the Guide Pages Designer, a guide page project will not be displayed. To open an existing guide page project in the Guide Pages Designer, select a guide page project in the **Select Guide Page Project** field above the attribute window on the right. The selected guide page project is displayed in the explorer pane and its content is displayed in the center pane.

If you have created guide pages using the previous non-browser based GuidePagesDesigner.exe, these will typically be stored on a local file system. You can upload the guide page project from the local file system to the browser-based Guide Pages Designer. Please note that once the guide page project is uploaded to the Guide Pages Designer, it cannot be downloaded again to the local file system. To upload an existing guide page project stored in the local file system:

1) Click the **New Guide Page Project** button to create an empty guide page project. The empty guide page project ⚙ is displayed in the explorer.

2) Click the **Upload from Disk** button.

3) In the explorer dialog box that opens, select the XML file in the top-level folder of your guide page project and open it. The selected guide page project is displayed in the explorer pane and its content is displayed in the center pane.

4) The guide page project can be edited as needed. The definition of the guide page project's attributes is described in the section Specifying the Visualization via the Guide Page Project Node.

Searching for Broken Links in the Guide Page Project

It may be that your solution configuration has been modified and the guide page project now contains links to functionalities or views that are no longer part of the Alfabet solution. To find and correct the guide pages, ensure that the currently implemented guide page project is selected in the **Select Guide Page Project** field. For more information about ensuring that the currently implemented guide pages are available in the guide page project, see the section Revising the Currently Implemented Guide Page Project.

Click the **Rescan Links** button. Any links to functionalities are views that are no longer available in the Alfabet solution will be displayed in the preview table at the bottom of the screen. The table displays the caption of the link as well as the type of configuration element in which it is configured. Click the link in the table to display it's configuration in the attribute window. You can either replace the target of the link by redefining the relevant attribute in the attribute window or by clicking the arrow 🔽 for the relevant node in the explorer and selected **Remove**. Click the **Save** button to save your changes.

Preventing the Rendering of the Preview Area

In some cases, you may want to suppress the display of the preview area. If, for example, a configured report is embedded or linked in a guide view/guide page and the query fails to execute properly, an error may occur. In this case, the query may be executed in an endless loop and the guide view/guide page will not render, thus causing a system failure in Alfabet. In this case, you can discontinue the rendering of the preview area for the guide views/guide pages which will suppress the execution of the query, allowing you to access the guide page project as well as other functionalities in Alfabet Expand. Once the broken query has been repaired, the preview area can be specified to render so that full-functionality is once again available in the Guide Pages Designer.

To suppress the rendering of the preview area, click the guide page project ⚙ at the root node of the explorer. In the attribute window, remove the checkmark in the **Render Preview Area** field. Click the **Save** button to save your changes. The preview area will be suppressed and will be blank for all guide views/guide pages in the guide page project.

To activate the rendering of the preview area, click the guide page project ⚙ at the root node of the explorer. In the attribute window, set the checkmark in the **Render Preview Area** field. Click the **Save** button to save your changes. The preview area will be rendered for all guide views/guide pages in the guide page project when the relevant guide view/guide page node is clicked in the explorer.

ⓘ The definition of the other attributes is described in the section Specifying the Visualization via the Guide Page Project Node.

Chapter 4:   Configuring Guide Views

A guide view can be configured to look like a Web page. You can specify a background color or background image for the entire view or a section of the view, the placement of texts, images, and links as well as the captions, height, color, and alignment of headers and texts. Furthermore, application links, internal links, external links, help links, or document links can be specified for pictures and texts. In order to ensure that business graphics can be adequately viewed on a variety of devices, it is recommended that guide views are designed for a lower screen resolution (such as 1280 x 800 or 1280 x 1024).

The following may be configured for a guide view:

- Information may be displayed in a single view or in tabbed pages.

- Embedded configured reports. The configured report can fill all or a part of the guide view or you can embed several reports in a guide view. The user can open an embedded report in the Alfabet interface by clicking on it.

- Text providing necessary information or instructions for users. Texts can be linked to Alfabet functionalities, standard page views, configured reports, other guide views, Web resources, online Help, or documents stored in the **Internal Documents** functionality.

- Automated assistants can be made available for each tab of the guide view.

- Images that have been uploaded to the icon gallery in Alfabet Expand. Images can be linked to Alfabet functionalities, standard page views, and configured reports, Web resources, online Help, or documents stored in the **Internal Documents** functionality. Furthermore, a link can be configured that opens the user's email program and fills the **To** field with a predefined email address. Links with the following information can also be added to a guide view.

    - A hyperlinked text that informs the current user about the number of open assignments. The link provides direct navigation to the **My Assignments** functionality

    - A hyperlinked text that informs the current user about the number of open workflow steps that he/she is responsible for as the responsible user or proxy user. The link provides direct navigation to the **Workflow Activities** functionality or a custom explorer.

    - A hyperlinked text that informs the current user about the number of collaboration topics that he/she has initiated or been invited to. The link provides direct navigation to the **My Collaborations** functionality.

    - A hyperlinked text that informs the current user about the number of Microsoft Teams® meetings due at the current date that he/she has initiated or been invited to via the Alfabet user interface. The link provides direct navigation to the **My MS Teams Meetings** functionality.

- A configured search field in the Alfabet header that allows users to search for objects in the Alfabet database. The search field relies on a configured report to search for objects. After the user enters the search criteria and clicks the search button, the configured report displaying the objects matching the search criteria will be displayed in the main viewing area. The search field is available in the standard Alfabet toolbar during the entire user session.

- A top menu at the top of the guide view that allows navigation to Alfabet functionalities. This is especially useful for such functionalities as **Search**, **Bookmark Desktop**, **My Calendars**, **Workflows**, etc.
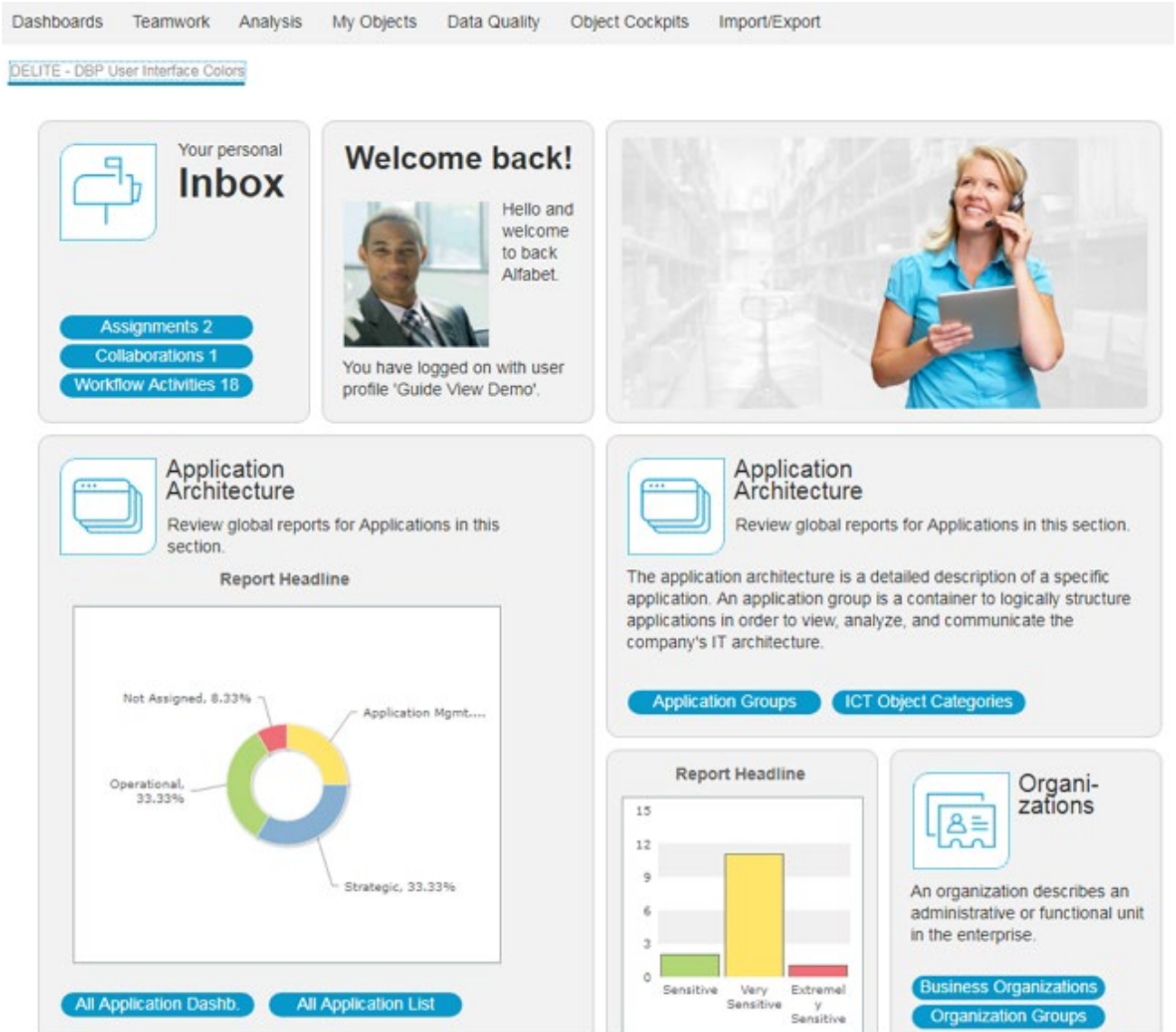
The figure above displays an example of a guide view with a top menu bar and a tab bar. The main section contains a flow panel that assures that the images and embedded reports are not truncated or stretched. The Inbox element provides personal information links to the **My Assignments**, **My Collaboration Topics**, and **My Workflow Activities** functionalities. The current user's picture is displayed. The other panels contain text, images, embedded reports, and application links that have been specified with texts that look like buttons.

⚠ The functionalitiy available in the guide view is accessible to all users that have permissions to the guide view. Please note that there is no such concept as a read-only version of a guide view.

⚠ If you implement a guide view as the start page for a user profile, then you must specify the guide view in the **Guide Page** attribute of the user profile. Because guide views may have links that target other guide views, you must explicitly define access permission to all guide views that may be accessed by the user profile. All other guide views that are targeted by links in the start page or other permissible guide views must be specified in the **Allowed Guide Views** attribute for the user profile. If a user attempts to navigate to a guide view that he/she does not have access permission to, an informational message will be displayed. For more information about configuring access permissions for a user profile, see either the chapter *Configuring User Profiles for the User Community* in the

reference manual *Configuring Alfabet with Alfabet Expand*, or the chapter *Defining and Managing User Profiles* in the reference manual *User and Solution Administration*.

The skin styles such as margins, borders padding, and box shadowing are specified via the GUI scheme. The skins specified for object cockpits will also apply to splash screens, guide views, and console reports. For more information about configuring GUI schemes, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The following information is available:

- Understanding the Guide View Designer

- Creating a Guide View

- Designing the Guide View

  - Defining the Container of the Guide View

  - Adding a Tabbed Page to the Guide View

  - Adding a Flow Panel to the Guide View

  - Adding a Table Layout Panel to the Guide View

  - Adding a Panel to a Guide View

  - Adding Guide View Text to the Guide View

  - Adding Guide View Pictures to the Guide View

  - Adding Embedded Configured Reports to the Guide View

  - Adding Embedded Analytics Dashboards to the Guide View

  - Adding an Application Link to a Guide View

  - Adding an External Link to a URL or Email to a Guide View

  - Adding a Document Link to a Guide View Text, Guide View Picture, or Panel

  - Adding a Help Link to a Guide View Text, Guide View Picture, or Panel

  - Adding an Editor/Wizard to Create a New Object

  - Adding a Workflow to Create a New Object

  - Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View

Understanding the Guide View Designer

To design a guide view, click the guide view [icon] node in the explorer. If a design exists, it will be displayed in the center pane. To open the guide view designer, click the arrow [icon] for the guide view [icon] node and select **Design View**. The guide view designer opens. The following section contains detailed information about the interface of the guide view designer. You should take some time to familiarize yourself with the various parts of the interface and acquaint yourself with the terminology used in the rest of this manual.

1) Header: Displays the name of the guide view that you are designing.

2) Toolbar: The toolbar contains buttons for accessing several common functions. Point to each button to view a tooltip. The purpose of the toolbar buttons are explained in the following sections:

	Delete	Delete the selected interface control from the database		**Cut**	Remove the selected interface control from the guide view
	Copy	Copy the selected interface control		**Paste**	Paste the selected interface control
	Tab Order	Define the sequence to move the focus to the next interface element for users using keyboard shortcuts. The definition of the tab order is necessary to support barrier-free accessibility.		**Align**	Align the edges of multiple selected interface controls
	Match Size of Items	Align the sizes of multiple selected interface controls		**Reorder**	Order the selected interface control in the view via the **Bring to Front** and **Send to Back** functionalities.
	Table Layout	Refine the layout of a table layout panel.		**Action**	Contains various options including **Move Tab Left** and **Move Tab Right** to rearrange the order of the tabbed pages.
	Toolbox	Hide or display the **Toolbox Items** pane. Note that the button is above the attribute window on the left side of the Guide View Designer.			

3) **Toolbox Items**: The toolbox contains all configuration elements that can be placed in the guide view. Click the toolbox item that you want to add to the guide view. The cursor will display an icon to indicate that the toolbox item is selected. Click an empty space in the guide view to place the toolbox item there.

4) **Canvas**: The canvas is the space in which you place interface controls in the **Toolbox Items** pane and visually design the guide view.

5) **Save** button: Click the **Save** button to save the guide view design to the database.

6) **Close** button. Click the **Close** button to close the guide view designer and return to the main view.

7) **Clear Changes** button. Click the **Clear Changes** button in order to undo all changes made to the guide view since the last save action.

8) **Clipboard** button. Click the **Clipboard** button in order to paste text to the clipboard to place in the guide view.

Creating a Guide View

You can create one or more guide views for a guide page project. Only one guide view can be assigned to a user profile. The guide view can be assigned to more than one user profile if necessary. Only one guide page project can be implemented in the Alfabet solution at a given time and therefore the guide page project that you plan to implement should contain all guide views (and guide pages) needed for all relevant user profiles. You can configure and design a first guide view and if you like, copy it to create other guide views. In this way, you can copy basic configuration elements such as configured links or design elements that you want to repeat in some or all guide views.

To create a guide view.

1) Click the guide page project node   at the top of the explorer, click the arrow   , and select **Add Guide View**. The new guide view   is added to the explorer with the default name Guide View 1, etc.

> You can use an existing guide view that is already configured and designed as a template to create a new one. The entire configuration will be copied to the new guide view and can be modified, as needed. Please note that when you use the **Copy** and **Paste** functionalities, the copied guide view will overwrite the guide view that you are copying to. If the guide view that you are copying to has a search field or top menu these too will be overwritten.
>
> To copy an existing guide view in order to create a new guide view, click the arrow   for the guide view   node that you want to copy and select **Copy**. Click the arrow   for the guide page project node   and select **Paste**. A new guide view is added to the explorer with the name **Copy (x) of <TemplateName>**.

2) In the attribute window for the tabbed page, define the following:

- **Name**: Specify the name of the guide view. The name must be unique. It is a technical name and will not be displayed on the interface.

  > Please note that when you open the guide view designer via the **Design View** functionality, the guide view name defined via the **Name** attribute will not be displayed but rather a GUID will be displayed in the header.

- **Caption**: Specify a title for the guide view. The caption will be displayed at the top of the guide view in the Alfabet user interface.

- **Fixed Width**: This attribute allows you to specify the sizing behavior of the guide view in the browser:

  - Set a checkmark if the content of the guide view should be centered in the browser window and shall maintain the width that will be defined for the container of the guide view. If the browser window is resized, the guide view will retain its specified width as it is repositioned in the resized browser window.

    > The width of the guide view is defined via the **Width** attribute of the default container, which is initially displayed when the user opens the guide view designer via the **Design View** functionality. If the checkmark is set for the **Fixed Width** attribute and the guide view is rendered in a device with a screen that is smaller than the defined width of the container of the guide view or is resized to a size smaller than the width of the container, the guide view will be rendered left-aligned and a

horizontal scroll bar will be displayed. For more information, see the section Defining the Container of the Guide View.

- Clear the checkmark if the guide view should be displayed left-aligned in the browser screen. If the browser window is resized, the content of the guide view will be redistributed to fit the available screen space.

- **Automated Assistant URL**: If custom help content should be available for the guide view via the automated assistant capability, enter the URL or server variable that targets the content to display in the Assistant in the **Automated Assistant URL** attribute. Please note that an automated assistant can also be assigned to a Flow Panel, Table Layout Panel, and Panel interface controls, allowing custom help to be available for each tab in a guide view. For more information about configuring the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

3) Click the **Save** button to save the new guide view. The **Search Field** and **Top Menu** nodes will be displayed below the guide view and may be configured if needed. You can do any of the following:

- Designing the Guide View

- Defining the Container of the Guide View

- Configuring a Top Menu for a Guide View or Guide Page

- Configuring a Global Search Field for a Guide View or Guide Page

Designing the Guide View

To design your guide view, you must first decide the basic structure to use to present the information, images, and links relevant for the user profile that the guide view will be assigned to. You can add color definitions, texts and images with or without links, and embedded configured reports. You can choose any of the following containers to visualize the guide view content:

- A page allows you to create a tabbed page displaying varying texts, images, and links in the guide view. Multiple pages can be added to a guide view, thus creating a guide view with a row of tabs at the top that allows the user to move between the various pages.

- A flow panel is a single view that ensures that the texts, images, and embedded reports are not squeezed, stretched, or truncated when the interface is resized. Business graphics embedded in a guide view will be automatically scaled down in size to fit in the available space in the screen.

- A table layout is a static view that provides a fixed structure consisting of columns and rows. This is especially useful to structure small pieces of information that are best structured in evenly-spaced rows and columns.

- A panel is a single view with floating content containing pictures, texts, and links. A panel allows you to configure runaround text like in a newspaper, whereby the text is adjusted to conform to a picture in the view. One or more panels may also be added to a tabbed page.

In the containers listed above, you can add any of the following:

- Blocks of text that could be serve as captions or instructional texts. Texts may have a link defined.

- Images that are stored in the icon gallery in Alfabet Expand. Images may have a link defined.

- Embedded configured reports.

- Hyperlinked texts, images, or panels that open a standard or configured view in Alfabet.

- Hyperlinked texts, images, or panels that open another guide view in the guide page project.

- Hyperlinked texts, images, or panels that open a URL.

- Hyperlinked texts, images, or panels that open the user's email program with a predefined email address.

- Hyperlinked texts, images, or panels that open a Help document.

- Hyperlinked texts, images, or panels that open a document stored in the **Internal Documents** functionality.

- A hyperlinked text that informs the current user about the number of open assignments. The link provides direct navigation to the **My Assignments** functionality

- A hyperlinked text that informs the current user about the number of open workflow steps that he/she is responsible for as the responsible user or proxy user. The link provides direct navigation to the **Workflow Activities** functionality or a custom explorer.

- A hyperlinked text that informs the current user about the number of collaboration topics that he/she has initiated or been invited to. The link provides direct navigation to the **My Collaborations** functionality.

- A hyperlinked text that informs the current user about the number of Microsoft Teams® meetings due at the current date that he/she has initiated or been invited to via the Alfabet user interface. The link provides direct navigation to the **My MS Teams Meetings** functionality.

- You can specify that a Tab, Panel, Guide View Text, Guide View Picture, or Presentation Object interface control is visible/not visible based on whether one or more conditions are fulfilled. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*

- An automated assistant providing custom help. An automated assistant can be configured for each Flow Panel, Table Layout Panel, and Panel interface controls.

Please keep the following in mind when configuring a guide view:

- In order to ensure that business graphics can be adequately viewed on a variety of devices, it is recommended that guide views are designed for a lower screen resolution (such as 1280 x 800 or 1280 x 1024).

- Please note that the **Dock** attribute can be configured for each panel, text, and picture added to a flow panel, tabbed page, or panel. The **Dock** attribute specifies the behavior of the content when the browser is resized. If the value `Fill` is selected for a panel, text, or picture, that element will be resized. If the value `Left` is selected, for example, that element will be docked on the left frame of the guide view and will remain static and will not adjust its size when the browser is resized. The setting for the **Dock** attribute must either be defined for all elements in a container or for no elements in a container. Errors may occur if the **Dock** attribute is defined for only some of the elements. The **Dock** attribute should be set to `None` if the panel needs to be deleted.

- Styles can be defined for the visual elements in the guide view. Please note that the font is configured via the GUI scheme specified by your enterprise. Any fonts defined in the context of the guide views will be overwritten by the font definition in the GUI scheme assigned to the relevant user profile. For more information, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the chapter *Configuring the Visualization of the Alfabet Interface*.

- Alfabet can be used in conjunction with JAWS® for Windows® software in order to support visually impaired users. Please note that the **Caption** attribute and **Hint** attribute should be defined for all interface controls added to the guide view. These attributes will be automatically read by the screen reader. When running Alfabet in conjunction with JAWS® for Windows® software, the texts will be read out in the language the user has selected in the Alfabet user interface if the same language has been selected in JAWS.

The following information is available:

- Defining the Container of the Guide View

- Adding a Tabbed Page to the Guide View

- Adding a Flow Panel to the Guide View

- Adding a Table Layout Panel to the Guide View

- Adding a Panel to a Guide View

- Adding Guide View Text to the Guide View

- Adding Guide View Pictures to the Guide View

- Adding Embedded Configured Reports to the Guide View

- Adding Embedded Analytics Dashboards to the Guide View

- Adding an Application Link to a Guide View

- Adding an External Link to a URL or Email to a Guide View

- Adding a Document Link to a Guide View Text, Guide View Picture, or Panel

- Adding a Help Link to a Guide View Text, Guide View Picture, or Panel

- Adding an Editor/Wizard to Create a New Object

- Adding a Workflow to Create a New Object

- Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View

Defining the Container of the Guide View

The default container is initially displayed when the user opens the guide view designer via the **Design View** functionality. If the available screen space is below the fixed width specified in the guide view, the guide view will be rendered left-aligned and a scroll bar will be displayed. The width is defined via the **Width** attribute of the default container, which is initially displayed when the user opens the designer via the **Design View** functionality. For more information, see the section Defining the Container of the Guide View.

1) Create the guide view as described in section Creating a Guide View.

2) Right-click the new guide view and select **Design View**. The guide view designer opens.

> ⓘ Please note that when you open the guide view designer via the **Design View** functionality, the guide view name defined via the **Name** attribute will not be displayed but rather a GUID will be displayed in the header.

3) In the attribute window for the tabbed page, define the following:

- **Background Color**: If necessary, define the background color of the guide view. Either enter the code of the color or click the square to open the color selector: Select a color and click **OK** to close the color selector.

- **Height**: Define the height of the guide view in pixel.

- **Width**: Define the width of the guide view in pixel.

> ⓘ Please note that the behavior of the guide view when resized or rendered in a screen smaller than the defined value in the **Width** attribute is determined by the **Fixed Width** attribute defined when the guide view is initially created. If the checkmark is set for the **Fixed Width** attribute and the guide view is rendered in a device with a screen that is smaller than the defined width of the container of the guide view or is resized to a size smaller than the width of the container, the guide view will be rendered left-aligned and a horizontal scroll bar will be displayed. For more information about defining the **Fixed Width** attribute, see the section Creating a Guide View.

4) Click **Save** to save the tabbed page definition.

Adding a Tabbed Page to the Guide View

A tabbed page is optimal if it is necessary to provide the user profile with extensive texts and links, many large images with links, or multiple embedded configured reports. A tabbed page allows you to specify a guide view that has multiple tabs that users can open.

You can define multiple tabbed pages for a guide view. The guide view will display a row of tabs at the top of the view. Each tabbed page can be include varying texts and images with or without links as well as embedded configured reports. Furthermore, panels can be added to a tabbed page in order to configure floating content, whereby the runaround text is adjusted to conform to a picture in the view.

To add a tabbed page to the guide view:

1) Create the guide view as described in section Creating a Guide View.

2) Right-click the new guide view and select **Design View**. The guide view designer opens.

3) Click the **Page** interface control in the **Toolbox Items** pane and click in the guide view designer pane. The page is displayed with one tab.

> ⓘ If you have clicked another interface element and the attribute window for the tabbed page is no longer in focus, click the tab and then click anywhere in the design area where there is no interface element to display the attribute window of the tabbed page. If a flow panel or panel fills the design area, you may need to scroll down to click below the panel. The name of the tabbed page will be displayed at the top of the attribute window.

4) In the attribute window for the tabbed page, define the following:

- **Name**: Define the technical name of the tabbed page.

- **Caption**: Define the caption that should be displayed on the tab. If no caption is defined, the default value will be displayed on the tab of the tabbed page.

- **Hint**: Define the hint for the tabbed caption. The hint will be displayed when the user points to the tab.

- **Styles**: Expand the **Styles** section of the attribute window and define the relevant options available for the tabbed page.

> ⓘ The color of the underline displayed on the tab when it is selected is determined by the **Color** attribute in the **Font** section of the tabbed page in the context of the guide view designer. The type of font displayed in the guide view is configured via the GUI scheme specified by your enterprise. For more information, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the chapter *Configuring the Visualization of the Alfabet Interface*.

5) You can now add any of the following to the tabbed page:

- [Adding Guide View Text to the Guide View](#)

- [Adding Guide View Pictures to the Guide View](#)

- [Adding a Panel to a Guide View](#)

- [Adding Embedded Configured Reports to the Guide View](#)

- [Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View](#)

6) To add additional tabbed pages to the view, click the **Page** ▢ interface control in the **Toolbox Items** pane and click in the guide view designer pane. Another tab is displayed and the tabbed page can be designed. You can copy the content configured in one tabbed page to another tabbed page using the **Copy** button in the toolbar of the guide view designer or by clicking CTRL + C. Furthermore, you can use the options **Action** > **Move Tab Left** and **Action** > **Move Tab Right** in the toolbar to rearrange the order of the tabbed pages.

7) Click the area where the tabs are located to place the focus on the group of tabs. Define the **Padding** attributes to specify the padding around the group of tabs.

8) Once all tabbed pages have been added to the guide view, define the sequence of the tabs when the user navigates via the TAB key through the user interface. To do so, you can use the **Tab Order** $^{1}{}_{2}{}_{3}$ button in the toolbar to define the tab sequence or enter an integer (1, 2, 3, etc.) in the **Tab Index** attribute for each tabbed page.

9) You can specify that a Tab interface control is visible/not visible based on whether one or more conditions are fulfilled. If all visibility conditions fail for an interface control, the visibility will be revoked for that interface control. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*. To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

- **Parameter Name**: Displays the variables used in the condition.

- **Parameter Value**: This column is not relevant for guide views.

- **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

10) Click **Save** to save the tabbed page definition.

Adding a Flow Panel to the Guide View

A flow panel is a single view that ensures that the texts, images, and embedded reports are not squeezed, stretched, or truncated when the interface is resized. The flow panel can include texts and images with or without links, and embedded configured reports.

Please note that the placement of the interface controls in the guide view designer as well as their alignment and spacing horizontally is not relevant to the displayed output. The actual display in the Alfabet interface at runtime will be determined by the tab sequence and linebreaks that you define in the guide view configuration. However, it is recommended that you position the interface controls in the guide view designer in the order that you want them to be displayed in order to make the conceptualization and design of the guide view easier.

Multiple breaks can be included in the flow panel in order to control how the interface controls are placed in the guide view and when one or more interface controls should shift down to the next row. A break in the flow panel forces the interface control following the break to bump to the next row. In this way, you can add visual space and structure the layout of interface controls. This might be useful, for example, to visually separate to thematically information in the guide view. You must include a break when you define the tab order so that it is correctly positioned in the sequence of interface controls.

(i) The font color and font style for the captions of the Presentation Object interface controls embedded in flow panels in guide views and object cockpits is specified via the **Flow Panel Presentation Object Caption Font** attribute for the relevant GUI scheme. For more information about configuring the GUI scheme for a user profile, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the chapter *Configuring the Visualization of the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand* as well as a detailed documentation of all GUI scheme attributes in the chapter *Overview of GUI Scheme Attributes* in reference manual *Configuring Alfabet with Alfabet Expand - Appendix*

When you design the layout of the guide view, you must consider the following factors:

- **The order in which you want information to be displayed on the interface.** All interface controls that you place in the guide view must be sequenced in order to determine their order from left to right and top to bottom on the interface. The interface controls are assigned a tab order in the last step of the design process but it is useful to have a general idea of what this order will be when you begin to configure the guide view.

- **The width in pixel of the individual interface controls.** Any interface control with a defined width that is greater than the defined width of the guide view will be truncated and not all content will be visible. Therefore, if you have a guide view that is 1200 pixel, the sum of the width of the interface controls that you want to display in a row should not be greater than 1200. For example, if you want to display 3 configured reports in the same row in a guide view that is 1200 pixel wide, you should define each configured report to have a width of 400 pixel. If the screen size is smaller than 1200 pixel or the user manually reduces the width of the guide view to less than 1200 pixel, the third configured report would be bumped down to the next row.

- **The height in pixel of the individual configured reports.** All configured reports require a defined height and width. The height of a configured report will not be automatically sized based on its content.

To create a flow panel:

1) Create the guide view as described in section Creating a Guide View.

2) In the attribute window of the guide view , deselect the **Fixed Width** attribute to ensure that the content in the flow panel is redistributed in the available space when the browser is resized. This ensures that the interface controls will be bumped down and placed below the preceding view or set of views.

3) Right-click the new guide view and select **Design View**. The guide view designer opens.

4) Click the **Flow Panel** interface control in the **Toolbox Items** pane and click in the guide view designer pane. Drag the flow panel to fill the guide view.

5) In the attribute window for the flow panel, define the following:

   • **Name**: Define the technical name of the flow panel.

   • **Caption**: Define the caption that should be displayed in the flow panel.

   • **Dock** : Specify `Fill` to ensure that the flow panel is docked in the guide view. You can now add text, images, embedded configured reports, and breaks to structure the content. The **Dock** attribute should be set to `None` if the flow panel needs to be deleted.

   > The **Height** and **Width** attributes are irrelevant for the configuration of the flow panel. The flow panel will be automatically sized to fill the available space in the user interface.

   • **Hint**: Define the hint for the tabbed caption. The hint will be displayed when the user points to the tab.

   • **Styles**: Expand the **Styles** section of the attribute window and define the relevant options available for the flow panel.

   > Font is configured via the GUI scheme specified by your enterprise. For more information, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the chapter *Configuring the Visualization of the Alfabet Interface*.

   • **Automated Assistant URL**: If custom help content should be available for the guide view tab via the automated assistant capability, enter the URL or server variable that targets the content to display in the Assistant in the **Automated Assistant URL** attribute. Please note that an automated assistant can also be assigned to the guide view that the Flow Panel is assigned to as well as to Table Layout Panel and Panel interface controls, allowing custom help to be available for each tab in a guide view. For more information about configuring the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

6) You can now add the following to the flow panel:

   • Adding Guide View Text to the Guide View

   • Adding Guide View Pictures to the Guide View

   • Adding Embedded Configured Reports to the Guide View

   • Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View

7) To add a break to the content in the guide view, click the **Guide View Text** button and click in the Flow Panel interface control. Drag the Guide View Text interface control to the desired size or define the **Height** and **Width** attributes for the guide view text in the attribute window.

8) In the **Caption** attribute, enter `<break>`. Be sure to include the angle brackets.

> (i) Please note that the placement of the interface controls in the guide view designer as well as their alignment and spacing horizontally is not relevant to the displayed output. The actual display in the Alfabet interface at runtime will be determined by the tab sequence and line-breaks that you define in the guide view configuration. Breaks should be configured to create a separator in the layout. In this way, you can visually structure the layout. This might be useful, for example, to visually separate texts from pictures or to thematically structure sections of the guide view. The content before each linebreak should have the same height. Otherwise the content will not be horizontally aligned.

9) Repeat this throughout the guide view to structure its layout.

10) Once all interface controls have been added to the guide view, define their sequence when the user navigates via the TAB key through the user interface. To do so, enter an integer (1, 2, 3, etc.) in the **Tab Index** attribute for each interface element.

11) You can specify that a Flow Panel interface control is visible/not visible based on whether a condition is fulfilled. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*. To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

- **Parameter Name**: Displays the variables used in the condition.

- **Parameter Value**: This column is not relevant for guide views.

- **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

12) Click **Save** to save the tabbed page definition.

Adding a Table Layout Panel to the Guide View

A table layout is a static view that provides a fixed structure consisting of columns and rows. This is especially useful to structure small pieces of information that are best structured in evenly-spaced rows and columns. Each table cell in the Table Layout Panel interface control serves as a frame in which you can add content to the guide view. The content can either be a static text, a picture, or configured report. Once content has been placed in the table cell, the size of the table cell can be modified, as needed. Configured reports embedded in the Table Layout Panel interface control should be vertically positioned rather than horizontally for small display sizes. The guide view will be automatically sized to fill the available space in the user interface.

1) Create the guide view as described in section Creating a Guide View.

2) Right-click the new guide view and select **Design View**. The guide view designer opens.

3) Click the **Table Layout Panel** interface control in the **Toolbox Items** pane and click in the guide view designer pane. Drag the table panel to fill the guide view.

4) The default Table Layout Panel interface control is made up of 3 rows and 3 columns. Click in the Table Layout Panel interface control to activate the attribute window. The **Table Layout** attribute displays the value 3x3 (3 rows x 3 columns). You can edit the **Table Layout** attribute.

> ⓘ The **Height** and **Width** attributes are irrelevant for the configuration of the table. The table will be automatically sized to fill the available space in the user interface.

5) In the attribute window for the table layout panel, define the following:

- **Name**: Define the technical name of the table layout panel.

- **Hint**: Define the hint for the table layout panel. The hint will be displayed when the user points to the table layout panel.

- **Styles**: Expand the **Styles** section of the attribute window and define the relevant options available for the table layout panel.

> ⓘ Font is configured via the GUI scheme specified by your enterprise. For more information, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the chapter *Configuring the Visualization of the Alfabet Interface*.

- **Automated Assistant URL**: If custom help content should be available for the guide view tab via the automated assistant capability, enter the URL or server variable that targets the content to display in the Assistant in the **Automated Assistant URL** attribute. Please note that an automated assistant can also be assigned to the guide view that the Table Layout Panel is assigned to as well as to Flow Panel and Panel interface controls, allowing custom help to be available for each tab in a guide view. For more information about configuring the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

6) You can now add the following to the flow panel:

- Adding Guide View Text to the Guide View

- Adding Guide View Pictures to the Guide View

- Adding Embedded Configured Reports to the Guide View

- Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View

7) You can do any of the following to change the table or its cells:

- Edit the column span or row span of a table cell containing content. In this way, you can increase the width or height of a cell. To do so, click the element to open its attribute window. Adjust the values in the **Column Span** and **Row Span** attributes, as needed. You may not enter a number less than 1 nor greater than the corresponding column or row definition in the table's **Table Layout** attribute.

- Copy a table cell containing content and paste it to an empty table cell. This allows you to copy elements that have already been adjusted to have the correct size. In this way, for example, you can paste several correctly sized embedded reports, and simply change the **Source** attribute for each configured report. To do so, right-click the element you want to copy and select **Copy** in the context menu and right-click the empty table cell and select **Paste**. The copied element can be modified, as needed. The key operations CTRL + C and CTRL + V can be used to copy and paste cockpit elements.

- Change the number of rows and columns. To do so, click the table to view the attribute window in the right pane. The **Table Layout** attribute will display the maximum number of defined rows and columns in the syntax <rows>x<columns>. Edit this value, as needed. The **Table Layout** attribute will be automatically updated.

- Use the options available via the **Table Layout** button in the toolbar to refine the table layout panel.

8) Once all tabbed pages have been added to the guide view, define the sequence of the tabs when the user navigates via the TAB key through the user interface. To do so, enter an integer (1, 2, 3, etc.) in the **Tab Index** attribute for each cell of the table.

9) Click **Save** to save the table layout definition.

Adding a Panel to a Guide View

A panel is a single view with floating content made up of pictures, texts, and links. A panel allows you to configure the guide view so that text is dynamically adjusted to conform to a picture in the view. The panel may constitute the guide view and group texts and images. Or one or more panels may be added to a tabbed page and be used to group texts and images. In this case, the runaround text will be displayed as configured for each panel in the tabbed page.

Furthermore, a panel can have a link defined so that if the panel is clicked, a link will open in the browser.

> Please note that a configured report cannot be embedded in a panel.

To create a panel:

1) Create the guide view as described in section Creating a Guide View.

2) In the attribute window of the guide view , deselect the **Fixed Width** attribute to ensure that the floating content in the panel is redistributed in the available space when the browser is resized.

3) Right-click the new guide view and select **Design View**. The guide view designer opens.

> If you want to add a panel to a tabbed page, you must first create the page as described in the section Adding a Tabbed Page to the Guide View. Then you can proceed as described below. If multiple panels will be added, you should specify the **Dock** attribute for each panel, whereby the panel that should be readjusted when the browser is resized should be set to `Fill`. For example, you could specify **Dock** = `Left` for one panel to be docked to the left edge of the guide view. This panel will be static and will not change when the browser is resized. For the other panel you would specific **Dock** = `Fill`. This panel would be positioned to the right of the first panel and will be adjusted if the browser is resized.

4) Click the **Panel** interface control in the **Toolbox Items** pane and click in the guide view designer pane. Drag the panel to fill the guide view.

5) In the attribute window for the panel, define the following:

- **Name**: Define the technical name of the panel.

- **Hint**: Define the hint for the tabbed caption. The hint will be displayed when the user points to the tab.

- **Dock** : Specify `Fill` to ensure that the panel is docked in the guide view. You can now add text and images. The **Dock** attribute should be set to `None` if the panel needs to be deleted.

- **Styles**: Expand the **Styles** section of the attribute window and define the relevant options available for the panel. To specify rounded corners, enter a value in pixel for the **Border Radius** attribute.

> (i) Font is configured via the GUI scheme specified by your enterprise. For more information, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the chapter *Configuring the Visualization of the Alfabet Interface*.

- **Automated Assistant URL**: If custom help content should be available for the guide view tab via the automated assistant capability, enter the URL or server variable that targets the content to display in the Assistant in the **Automated Assistant URL** attribute. Please note that an automated assistant can also be assigned to the guide view that the Panel is assigned to as well as to Flow Panel and Table Layout Panel interface controls, allowing custom help to be available for each tab in a guide view. For more information about configuring the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

6) Expand the **Guide View Relevant Attributes** section of the attribute window and select the checkbox for the **Floating Content** attribute if the content in the guide view text in the panel should be displayed as runaround text around images. The text will be dynamically adjusted if the browser is resized.

7) Expand the **Link Definition** attribute and define the relevant attributes if a defined link target should open when the user clicks the picture. For more information about defining links, see the following:

- [Adding an Application Link to a Guide View](#)

- [Adding an External Link to a URL or Email to a Guide View](#)

- [Adding a Document Link to a Guide View Text, Guide View Picture, or Panel](#)

- [Adding a Help Link to a Guide View Text, Guide View Picture, or Panel](#)

- [Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View](#)

8) Expand the **Link Mouse Hover Style** section of the attribute window if you want links in the text to display a different color when the user points to a hyperlinked text. Define the color that the text should change to in the **Background Color** attribute. Define the borders, margins, and padding of the colored text as needed.

9) Expand the **Background Image Source Definition** section of the attribute window and define the following attributes, as needed:

- : ?

- **Icon Type**: Select the relevant option based on the size of the icon that you want to add:

  - `Small`: To add PNG files with images that are 22x22 pixel in size

  - `Large`: To add PNG files with images that are 30x30 pixel in size

  - `Free`: To add PNG files with images that are of an arbitrary size

  - `OriginalImage`: To add any file format with an arbitrary size. Please note that the **Original Images** library is available only for images used in guide views. Any file format supported by the browser used to render Alfabet may be uploaded to the Original Images library: Please note that BMP files will be automatically converted to PNG since most browsers do not support the BMP format.

- **Icon Name**: Select the icon from the icon library chosen in the **Icon Type** field. Any icon that you want to add to the guide view first must be imported to the icon gallery. For more information, see the section *Adding and Maintaining Icons for the Alfabet Interface*.

- **Repeat Background**: Select the checkbox if the icon should be repeated to fill the panel.

- **Use User Picture**: Select the checkbox if the user picture should be displayed in the panel.

10) Add one or more guide view pictures to the panel. To do so, click the **Guide View Picture** button and click in the panel. Define the attributes in the **Picture Source Definition** section of the attribute window as described in the section Adding Guide View Pictures to the Guide View. If you selected the checkbox for the panel's **Floating Content** attribute, the **Float Style** attribute will be available in the **Picture Source Definition** section of the attribute window. Select one of the options to specify the position of the picture in relation to the guide view text that you will add. For example, if the picture is to be located to the right of the text, select `Right`.

11) Next, add one or more guide view texts to the panel. To do so, click the **Guide View Text** button and click in the panel. Define the text as described in the section Adding Guide View Pictures to the Guide View. If you selected the checkbox for the panel's **Floating Content** attribute, the **Clear** attribute will be available in the **Guide View Relevant Attributes** section of the attribute window. Define whether the text should or should not fill the space next to the picture. Select one of the following:

- `Right`: The text should clear the space to the right of the picture. The space to the right of the picture will be empty and the text will be bumped to the row below the picture.

- `Left`: The text should clear the space to the left of the picture. The space to the left of the picture will be empty and the text will be bumped to the row below the picture.

- `Both`: The text should clear the space to the right and the left of the picture. The space to the right and left of the picture will be empty and the text will be bumped to the row below the picture.

- `None`: The text will be placed directly next to the picture.

12) Once all texts and pictures have been added to the guide view, define their sequence when the user navigates via the TAB key through the user interface. To do so, enter an integer (1, 2, 3, etc.) in the **Tab Index** attribute for each element in the panel.

13) You can specify that a Panel interface control is visible/not visible based on whether a condition is fulfilled. The visibility of interface controls embedded in a Panel interface control in a guide view will be determined by the visibility condition specified for the Panel interface control. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*. To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

- **Parameter Name**: Displays the variables used in the condition.

- **Parameter Value**: This column is not relevant for guide views.

- **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

14) Click **Save** to save the panel.

Adding Guide View Text to the Guide View

A Guide View Text interface control can be added to the Flow Panel, Table Layout Panel, Page, or Panel interface controls to visualize text in the guide view.

To add and configure a Guide View Text interface control:

1) In the **Toolbox Items** pane of the guide view designer, click the **Guide View Text** $\mathbf{A}$ button and click in the Flow Panel, Table Layout Panel, Page, or Panel interface control that has been added to the guide view.

2) Click the Guide View Text interface control in the container element to activate its attribute window. The **Control Type** attribute is automatically set to `GVText`.

3) In the **Caption** attribute, enter the text that should be displayed for the Guide View Text interface control. This could be a short text such as a property caption or comprehensive information.

4) To change the size of the text box, expand the **Coordinates** section of the attribute window and enter a value in pixel for the **Height** and **Width** attributes, or drag the text box to the correct size.

5) Expand the **Style** section of the attribute window and define the attributes available for background color, font color and style, borders, and padding, as needed. For example, you might want to specify blue font and underline in order to make text look like a hyperlink.

   • To specify rounded corners, enter a value in pixel for the **Border Radius** attribute.

   • If you specify a large font (for example, higher than 20), overlapping of lines may occur. In this case, specify the **Line Height** attribute to ensure that there is enough space between the lines in the text. It is recommended that you set the value of this property to the same value as the **Size** attribute in the **Font** section of the attribute window. The default value is -1 which means that no explicit height definition will be applied.

6) Expand the **Link Definition** attribute and define the relevant attributes if a defined link target should open when the user clicks the text box. For more information about defining links, see the following:

   • [Adding an Application Link to a Guide View](#)

   • [Adding an External Link to a URL or Email to a Guide View](#)

   • [Adding a Document Link to a Guide View Text, Guide View Picture, or Panel](#)

   • [Adding a Help Link to a Guide View Text, Guide View Picture, or Panel](#)

   • [Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View](#)

7) You can specify that a Guide View Text interface control is visible/not visible based on whether a condition is fulfilled. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*.To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

   • **Parameter Name**: Displays the variables used in the condition.

   • **Parameter Value**: This column is not relevant for guide views.

   • **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

8) In the toolbar, click the **Save** button to save your changes.

Adding Guide View Pictures to the Guide View

You can add graphic images to a Flow Panel, Table Layout Panel or Panel interface control. The graphic images that you want to include in the guide view must already be available in the icon gallery in Alfabet Expand. For more information about importing graphic images to the icon gallery, see the section *Adding and Maintaining Icons for the Alfabet Interface*.

To add an Guide View Picture interface control to the guide view:

1) In the **Toolbox Items** pane of the guide view designer, click the **Guide View Picture** button and click in the Flow Panel, Table Layout Panel or Panel interface control that has been added to the guide view.

2) Click the Guide View Picture interface control in the container element to activate its attribute window. The **Control Type** attribute is automatically set to GVPicture. An empty box displays the undefined icon in the guide view.

3) In the **Hint** field, define a tooltip for the picture. The hint will be displayed when the user points to the picture.

4) Expand the **Picture Source Definition** attribute. To display the picture of the currently logged in user viewing the guide view, select the **Use User Picture** checkbox. To display a graphic image available in the icon gallery, define the following attributes:

   • **Icon Type**: Select the relevant option based on the size of the icon that you want to add:

      • Small: To add PNG files with images that are 22x22 pixel in size

      • Large: To add PNG files with images that are 30x30 pixel in size

      • Free: To add PNG files with images that are of an arbitrary size

      • OriginalImage: To add any file format with an arbitrary size. Please note that the **Original Images** library is available only for images used in guide views. Any file format supported by the browser used to render Alfabet may be uploaded to the Original Images library: Please note that BMP files will be automatically converted to PNG since most browsers do not support the BMP format.

      > Due to security issues, graphics in SVG formats are not supported for guide views and guide pages.

   • **Icon**: Select the relevant icon that you want to display in the guide view. The icons that you can choose from are based on the value you selected in the **Icon Type** attribute.

5) To change the size of the picture, expand the **Coordinates** section of the attribute window and enter a value in pixel for the **Height** and **Width** attributes, or drag the picture to the correct size.

6) Expand the **Style** attribute and define the attributes available for background color, font color and style, borders, and padding, as needed.

7) Expand the **Link Definition** attribute and define the relevant attributes if a defined link target should open when the user clicks the picture. For more information about defining links, see the following:

   • Adding an Application Link to a Guide View

- [Adding an External Link to a URL or Email to a Guide View](#)

- [Adding a Document Link to a Guide View Text, Guide View Picture, or Panel](#)

- [Adding a Help Link to a Guide View Text, Guide View Picture, or Panel](#)

- [Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View](#)

8) You can specify that a Guide View Picture interface control is visible/not visible based on whether a condition is fulfilled. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*. To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

- **Parameter Name**: Displays the variables used in the condition.

- **Parameter Value**: This column is not relevant for guide views.

- **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

9) In the toolbar, click the **Save** button to save your changes.

Adding Embedded Configured Reports to the Guide View

You can embed multiple configured reports in the guide view via the Presentation Object interface control. All views displayed in the guide view are ReadOnly and users will not be able to edit data in the context of the guide view. Users may navigate to the object profile of objects displayed in an embedded configured report by double-clicking the object. If a configured report is embedded in the guide view and that report does not have the **State** attribute set to `Active` (perhaps because the report designer has changed the state in order to modify the configured report), a message will be displayed in the guide view where the report is embedded explaining that the report is temporarily unavailable.

⚠️ A configured report embedded in or linked to a guide view/guide page will be accessible via the user profile that the guide page project is assigned to, regardless of the authorization defined for the configured report.

For more information about specifying configured reports, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The width that you define for a configured report will influence the number of configured reports that may be displayed horizontally. Therefore, you should consider the defined width of the guide view and consider how many configured reports you would ideally like to display horizontally. Partly this will depend on the data displayed in the configured report. If you expect minimal data to be displayed, the width could be small. In general though, it is recommended that they not be smaller than 400 pixel in width. If the data displayed in the configured report is dense (as in a diagram or business support map, for example), you might want the width of the configured report to be slightly less than the size of the width of the guide view. Any configured report with a defined width that is greater than the defined width of the guide view will be truncated and not all content will be visible.

All configured reports require a defined height. The height of a configured report will not be automatically sized based on its content. A zoom functionality will be available automatically for views with business graphics.

To add a border to the presentation object, you must embed the presentation object in a **Panel** interface control and define styles for the panel. For more information about adding a panel, see the section Adding a Panel to a Guide View.

To add a configured report to the guide view

1) In the **Toolbox Items** pane of the guide view designer, click the **Presentation Object** button and click in the Flow Panel, Table Layout Panel or Panel interface control that has been added to the guide view.

2) Click the Presentation Object interface control in the container element to activate its attribute window. The **Control Type** attribute is automatically set to `Presentation`.

3) Define the following attributes, as needed:

  • **Sub-Type** : Ensure that this attribute is set to `View`.

  • **Source**: Click the **Browse** button and in the **Select Source** editor that opens, select `Configured Reports` and select the relevant configured report in the drop-down field. All configured reports will be displayed. Click **OK**.

    The **Business Functions/Explorers** option in the **Select Source** editor may not be selected in the context of an **Presentation Object** interface control.

  • **Caption**: Enter a title for the configured report.

  • **Width**: Define the width in pixel for the presentation object. Any presentation object with a defined width that is greater than the defined width of the guide view will be truncated and not all content will be visible. Because the presentation object's typically contain lots of information, it is recommended that they not be smaller than 400 pixel in width.

  • **Height**: Define the height in pixel for the presentation object. Please note that if you specify that the height of one presentation object in a row is greater than the height of the other presentation objects, empty space may result in the row. This is because the bottom edge of the largest presentation object will be used to determine the top edge of the next row.

  • **Hint**: Define a tooltip for the configured report. The hint will be displayed when the user points to the configured report.

4) To add a caption for the configured report, click the **Guide View Text** button in the design editor and place the Guide View Text interface control directly above the presentation object. In the **Caption** attribute for the guide view text, enter a caption for the view.

5) You can specify that a Presentation Object interface control is visible/not visible based on whether a condition is fulfilled. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*. To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

  • **Parameter Name**: Displays the variables used in the condition.

- **Parameter Value**: This column is not relevant for guide views.

- **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

6) In the toolbar, click the **Save** button to save your changes.

Adding Embedded Analytics Dashboards to the Guide View

You can embed multiple analytics dashboards in the guide view via the Presentation Object interface control. All analytics dashboards displayed in the guide view are read-only and users will not be able to edit data in the context of the guide view. Users may navigate to the object profile of objects displayed in an embedded analytics dashboards by double-clicking the object.

- Analytics dashboards must be specified by a user in the **Analytics Dashboards** functionality. Access permissions specified for the analytics dashboard will also apply to the analytics dashboard embedded in the guide page. For more information about creating analytics dashboards, see the section *Designing, Sharing, and Viewing Analytics Dashboards* in the reference manual *Getting Started with Alfabet*.

- The general information described in the section Adding Embedded Configured Reports to the Guide View also applies to analytics dashboards embedded in a guide view.

To add a configured report to the guide view

1) In the **Toolbox Items** pane of the guide view designer, click the **Presentation Object** button and click in the Flow Panel, Table Layout Panel or Panel interface control that has been added to the guide view.

2) Click the Presentation Object interface control in the container element to activate its attribute window. The **Control Type** attribute is automatically set to `Presentation`.

3) Define the following attributes, as needed:

- **Sub-Type** : Ensure that this attribute is set to `View`.

- **Source**: Click the **Browse** button and in the **Select Source** editor that opens, select `Page Views`. Select `DVEXPD_DashboardView - Analytics Dashboard Navigation View` in the **Source Object** field and click **OK**.

- **Custom Attribute** : Enter `ContextArgs=<REFSTR` of analytics dashboard to display>. A configured report can be created to retrieve the REFSTRs of the analytics dashboards. For more information about specifying configured reports, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Caption**: Enter a title for the analytics dashboard.

- **Width**: Define the width in pixel for the presentation object. Any presentation object with a defined width that is greater than the defined width of the guide view will be truncated and not all content will be visible. Because the presentation object's typically contain lots of information, it is recommended that they not be smaller than 400 pixel in width.

- **Height**: Define the height in pixel for the presentation object. Please note that if you specify that the height of one presentation object in a row is greater than the height of the other presentation objects, empty space may result in the row. This is because the bottom edge of the largest presentation object will be used to determine the top edge of the next row.

- **Hint**: Define a tooltip for the analytics dashboard. The hint will be displayed when the user points to the analytics dashboard.

4) To add a caption for the analytics dashboard, click the **Guide View Text** 𝐀 button in the design editor and place the Guide View Text interface control directly above the presentation object. In the **Caption** attribute for the guide view text, enter a caption for the view.

5) You can specify that a Presentation Object interface control is visible/not visible based on whether a condition is fulfilled. Please note the conditions must already be specified in the configuration tool Alfabet Expand. For more information about configuration conditions, see the section *Configuring Conditional Restraints in the Object Cockpit* in the reference manual *Configuring Alfabet with Alfabet Expand*. To apply a visibility condition to the Panel interface control, click the **Visibility Conditions** attribute to open the **Condition Usage** editor. In the **Use** column, select the condition to implement. If the condition is based on an expression, click the condition in the dataset of the editor define the following in the lower panel:

- **Parameter Name**: Displays the variables used in the condition.

- **Parameter Value**: This column is not relevant for guide views.

- **Parameter Value Reference**: Select the interface control that shall be visible if the variable in the **Parameter Name** column to the source interface control (Interface Control 1) of the condition.

6) In the toolbar, click the **Save** 💾 button to save your changes.

Adding an Application Link to a Guide View

You can add an application link to a Guide View Text, Guide View Picture, or Panel interface control. The application link may target a functionality, configured report, standard page view, standard or configured object view (object profile/object cockpit) in Alfabet, or another guide view configured for the guide page project. For detailed information about configuring an application link, see the information provided in the section Adding Application Links to the Navigator Menu or to a Topic.

ⓘ A link that has been erroneously defined cannot be deleted. If an erroneously defined link must be deleted, you must delete the guide view text, guide view picture, or panel that it has been created for.

To define an application link:

1) Click the Guide View Text, Guide View Picture, or Panel interface control that you want to define the link target for.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select `Application`.

3) In the **Link Destination** field, select one of the following options. The attribute window will be updated with attributes relevant to the option you select.

4) Click the **Save** button to save the application link defined for the guide view.

Adding an External Link to a URL or Email to a Guide View

You can add an external link to a Guide View Text, Guide View Picture, or Panel interface control. By adding an external link, you can define a link that will open a URL or you can define email address. In this case, when the user clicks the hyperlinked text, picture, or panel, the user's email program will open with the specified address in the **To** field.

ⓘ A link that has been erroneously defined cannot be deleted. If an erroneously defined link must be de-leted, you must delete the guide view text, guide view picture, or panel that it has been created for.

To define an external link:

1) Click the Guide View Text, Guide View Picture, or Pane interface control that you want to define the link target for.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select `External`.

- To define a URL, specify the URL that shall open in the URL field. Please note the following:

  - Links to URLs defined for the guide views must conform to current URL standards.

  - Links to URLs defined for the guide views must exclusively consist of ASCII characters. If, for example, you want to link to a configured report designed in Alfabet Expand, the name of the report must not contain any non-ASCII characters.

- To define an email address, click the **Email Link** checkbox. The attribute window will be updated with attributes relevant to the option you select. In the **Email** field, enter the email address that should automatically fill the **To** field in the email.

3) Click the **Save** button to save the external link defined for the guide view.

Adding a Document Link to a Guide View Text, Guide View Picture, or Panel

By adding a document link, you can define a link that will open a document stored in the **Internal Document Selector**. You can add a link to all documents in the **Internal Document Selector** except for the documents stored in the `SYSTEM` folder. The `SYSTEM` folder is reserved for system documents related to specific functionalities in Alfabet. For more information about making documents available to the user community, see the section *Uploading Documents and Managing User Permissions to Document Folders in the Internal Document Selector* in the reference manual *User and Solution Administration*.

ⓘ Please note that files must be stored in the **Internal Document Selector** to be used in the Guide Pages Designer. Files used in the Guide Pages Designer cannot be stored on an external file system.

⚠ Please note the following:

- The `SYSTEM` folder is reserved for system documents related to specific functionalities in Alfabet. You should not make any manual changes to the `SYSTEM` folder unless explicitly advised.

- Style sheets referenced in the context of object cockpits, wizards steps, HTML templates, etc. may not be stored in the root folder of the **IDOC** explorer. Stylesheets stored in the **Internal Document Selector** must be located in a document folder that is subordinate to the root folder of the **IDOC** explorer.

- For security reasons, a blacklist and whitelist concept has been introduced to restrict the uploading and downloading of files with permissible file extensions in Alfabet. An error message will be displayed f a user attempts to upload or download an impermissible file extension type. For more information about restricting file extensions, see the section *Specifying the Permissible File Extensions for Uploading/Downloading Files* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- Please note that the following file types cannot be opened directly in Alfabet and will be automatically saved and downloaded as a ZIP file even if not defined in the blacklist or additionally defined in the whitelist:.com,.bat,.exe,.ad,.adprototype,.asax,.ascx,.ashx,.asmx,.asp,.aspx,.axd,.browser,.cd,.compiled,.config,.cs,.csproj,.dd,.exclude,.java,.jsl,.ldb,.ldd,.lddprototype,.ldf,.licx,.master,.mdb,.mdf,.msgx,.refresh,.rem,.resources,.resx,.sd,.sdm,.sdmDocument,.sitemap,.skin,.soap,.svc,.vb,.vbproj,.vjsproj,.vsdisco, and .webinfo. A GUID extension will be added to the file name of the ZIP file.

> ⓘ A link that has been erroneously defined cannot be deleted. If an erroneously defined link must be deleted, you must delete the guide view text, guide view picture, or panel that it has been created for.

To define a document link:

1) Click the Guide View Text, Guide View Picture, or Pane interface control that you want to define the link target for.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select `IDOC`.

3) In the **Document Path** field in the attribute window, enter the path to the document in the **Internal Document Explorer**. The path has to start with `IDOC:\` and define the full path under the `IDOC` node of the **Internal Document Selector** including the file name and extension.

> ⓘ To evaluate the link structure in the **Internal Document Selector**, you can open the **Internal Document Selector** in the Alfabet interface. The **Internal Document Selector** opens when you use the **New** > **Add Document** option in the **Attachment** page view in the object profile of an object or in the **Internal Documents** functionality available via the **Admin** user profile.

4) Click the **Save** button to save the document link defined for the guide view.

Adding a Help Link to a Guide View Text, Guide View Picture, or Panel

By adding a Help link, you can define a link that will open a standard or customized Alfabet Help file.

> ⓘ A link that has been erroneously defined cannot be deleted. If an erroneously defined link must be deleted, you must delete the guide view text, guide view picture, or panel that it has been created for.

To define a Help link:

1) Click the Guide View Text, Guide View Picture, or Pane interface control that you want to define the link target for.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select `Help`.

3) In the **Help File Path** field in the attribute window, specify the path to the Help document. The path should reflect the relevant language folder according to the location of the Help files as specified in the

Help Server attribute in the server alias settings. For more information, contact your system administrator.

4) Click the **Save** button to save the Help link defined for the guide view.

Adding an Editor/Wizard to Create a New Object

You can configure an editor to open in the context of the guide view in order to create new objects based on an object class or object class stereotype. To do so, you can design a Guide View Text or Guide View Picture interface control to look like a button.

When the user clicks the button, the editor or wizard defined in the class settings for the object class or object class stereotype will open. You can also specify a link destination so that when the eidtor/wizard is closed, a view will open where the object is managed. This could be a business function, configured report, page view, object view, or guide view.

> ⓘ Please note that the link navigation requires that the wizard in which the object is being defined is completed. If the wizard is closed prematurely, then the guide view will be displayed rather than the target of the link navigation.

To specify an editor/wizard to open in order to create an object:

1) Click the Guide View Text or Guide View Picture interface control that you want to specify the object creation mechanism for.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select `CreateObject`.

3) In the **Object Class** field, specify the object class for which the object should be created.

4) If the object class has object class stereotypes, select the relevant object class stereotype for which the objects should be created in the **Object Class Stereotype**.

5) You can optionally provide navigation to a business function, configured report, page view, object view, or guide view where the object is managed. Once the object has been created by clicking the **OK** button in the editor or wizard, the specified view will open so that the user can further define the object. To do so, select one of the following in the **Link Destination** field:

6) In the **View Name** field, select the relevant business function, configured report, page view, object view, or guide view that is the target of the navigation link.

7) Click the **Save** button to save the configuration defined for the guide view.

Adding a Workflow to Create a New Object

You can configure a workflow to open in the context of the guide view in order to create a new objects in the context of the workflow. To do so, you can design a Guide View Text or Guide View Picture interface control to look like a button. When the configured link is clicked in the guide view by the user, the specified workflow will be triggered to create the new object. The relevant editor or wizard defined for the workflow template will open when the user clicks the button. Once the object has been created, the workflow will continue to run as specified in the workflow template configuration. For more information about configuring workflow templates, see the chapter *Configuring Workflows* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Please note that the link navigation requires that the editor/wizard in which the object is being defined is completed. If the wizard is closed prematurely, then the guide view will be displayed rather than the target of the link navigation.

To specify a workflow template in order to create an object:

1) Click the Guide View Text or Guide View Picture interface control that you want to specify the workflow template for.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select `StartNewWorkflow`.

3) In the **Workflow Template** field, specify the workflow template to trigger in order for object creation. It is only possible to select a workflow template for which the **Start Step for New Object** attribute is defined. The relevant editor or wizard defined for the workflow template will open when the user clicks the button.

4) You can optionally provide navigation to a business function, configured report, page view, object view, or guide view where the object is managed. Once the object has been created by clicking the **OK** button in the editor or wizard, the specified view will open so that the user can further define the object. To do so, select one of the following in the **Link Destination** field:

5) In the **View Name** field, select the relevant business function, configured report, page view, object view, or guide view that is the target of the navigation link.

6) Click the **Save** button to save the configuration defined for the guide view.

Adding Workflow, Assignment, Collaboration, and Microsoft Teams Meeting Links to the Guide View

You can include information about the number of open assignments and workflow activities that the current user is responsible for, the number of Microsoft Teams meetings scheduled for the current date he/she is invited to or has scheduled via the Alfabet user interface, as well as the collaboration topics that he/she has been invited to participate in the guide view. The relevant number will be automatically generated at runtime and the respective link will open when the user clicks the text.

To include this information, you must add a Guide View Text interface control to the guide view and specify the text to display in the **Caption** field. A link must then be configured for the guide view text. The open number of assignments, workflows or collaboration topics will be appended to the text at runtime. When the user clicks the texts, the respective view will open:

- A link to the **My Assignments** page view that is displayed if the user has pending assignments.

- A link to the **My Workflow Activities** page view that is displayed if the user is responsible for active workflow steps or has a proxy responsibility for active workflow steps.

Instead of displaying the default **Workflow Activities Explorer**, a custom explorer can be configured to open instead. The custom explorer must be specified in the **Custom Workflow Activities Explorer** attribute of the relevant user profile in Alfabet Expand. For more information about configuring custom explorers, see the chapter *Configuring Standard Business Functions and Custom Explorers*, and for more information about specify the custom explorer for a user profile, see the chapter *Configuring User Profiles for the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- A link to the **My Collaboration Topics** view that is displayed if the user has been invited to participate in a collaboration topic.

- A link to the **My MS Teams Meetings** view that is displayed if the user has scheduled or was invited to Microsoft Teams meetings scheduled for the current data and the Microsoft Teams meeting have either been scheduled via the Alfabet user interface or imported to Alfabet.

> ⓘ A link that has been erroneously defined cannot be deleted. If an erroneously defined link must be deleted, you must delete the guide view text, guide view picture, or panel that it has been created for.

To define a personal information link:

1) Create a Guide View Text interface control as described in the section <u>Adding Guide View Text to the Guide View</u> The text in the **Caption** attribute should be a string that provides information about the topic of the link and ends with a colon <:>. For example: "You have the following number of open assignments: ". The current number of open assignments will be automatically appended to the string defined in the **Caption** attribute of the guide view text.

2) Expand the **Link Definition** section of the attribute window and in the **Link Type** field, select either `Assignments.` `Collaborations,` `MSTeamsMeeting` or `Workflows.` The relevant view will open when the user clicks the link.

3) Click the **Save** button to save the link defined for the guide view.

Chapter 5:   Configuring Guide Pages
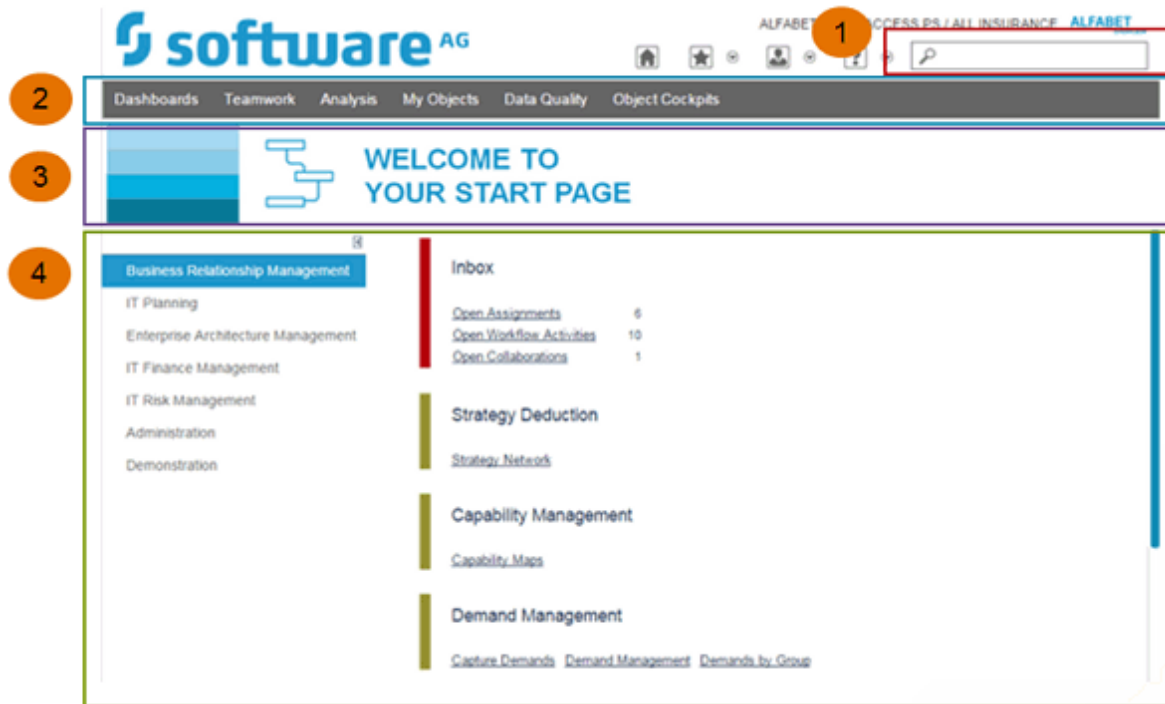
FIGURE: Example of a start page displayed in the Alfabet interface

The figure above displays an example of a guide page. The areas that are configured in the context of a guide page project are described in the table below:

Frame Color in Example	Node in Guide Page Project	Purpose
1: Red	Search Field	A search field may be configured for each guide page. The search field allows users to search for objects in the Alfabet database. The search field is available in the standard Alfabet toolbar throughout the entire user session and can be used repeatedly by the user to find and navigate to objects. The search field is based on a configured tabular report containing a filter. The report must be configured in the configuration tool Alfabet Expand. When the user enters a string in the search field and clicks the **Search** icon, the report will open displaying the objects that match the search criteria.
2: Blue	Top Menu	A top menu bar can be configured for each guide page. The top menu is displayed below the standard Alfabet menu. The top menu provides menu items that allow users to navigate to Alfabet functionalities. A top-level menu item may be directly linked to a specified functionality in Alfabet or may have sub menu items that link to specified functionalities.

Frame Color in Example	Node in Guide Page Project	Purpose
3: Purple	Welcome Panel	A welcome panel can be configured for each guide page. The welcome panel allows you to provide an overall title, text, and image for a guide page.
4: Green	Navigator Menu	A navigator menu and topic pages can be configured for each guide page. The navigator menu on the left contains application links that directly open a specified Alfabet functionality or that open a topic page that is displayed in the right pane. The topic page configured for the navigator item may display a title, text, images and hyperlinks to functionalities, documents, Help, configured reports as well as URLs.

To design a guide page, click the guide page node in the explorer. Any existing design and configuration of the guide page will be displayed in the center pane. Expand the guide page to display the **Search Field**

Top Menu , **Welcome Panel** , and **Navigator Menu** nodes below it. Each node can be defined for a selected guide page.

⚠ You can use the **Copy** and **Paste** functionalities to copy an entire guide page or a single configuration element such as a search field or welcome panel. When you use the **Copy** and **Paste** functionalities, the copied configuration element will overwrite the configuration element that you are copying to. If the configuration element that you are copying to has any subordinate elements these too will be overwritten.

After creating an element on a guide page, you can change the design such as color and font size and font as well as other design elements that can be configured via the CSS styles provided with the Guide Pages Designer. See the section Formatting and Designing the Guide Pages for detailed information about CSS formatting of guide pages.

The following information is available:

- Creating a Guide Page

- Designing the Welcome Panel

- Designing the Navigator Menu and Topic Pages

   - Creating and Sequencing Navigator Items and Subordinate Navigator Items

   - Creating Topics for the Topic Page of a Navigator Item

      - Adding an Application Link to a Topic

      - Adding an Internal Link to a Topic

      - Adding an External Link to a Topic

      - Adding a Help Link to a Topic

Creating a Guide Page

You can create one or more guide pages (and guide views) for a guide page project. Only one guide page (or guide view) can be assigned to a user profile. The guide page can be assigned to more than one user profile if necessary. Only one guide page project can be implemented in the Alfabet solution at a given time and therefore the guide page project that you plan to implement should contain all guide views needed for all relevant user profiles. You can configure and design a first guide page and copy it to create other guide pages. In this way, you can copy basic configuration elements such as configured links or design elements that you want to repeat in other guide pages.

When you create the guide page project, an initial guide page ▦ with the caption **Guide Page** is automatically added to the guide page project by default and displayed in the explorer with the icon. The **Guide Page** ▦ node is the first guide page in the guide page project. The **Guide Page** ▦ node as well as each guide page displayed in the explorer will have the four nodes **Search Field** 🔍 , **Top Menu** ▦ , **Welcome Panel** ▦ , and **Navigator Menu** ▤ . The search field, top menu, welcome panel, and navigator menu are all optional configurations. In other words, if you only want to provide functionality via the top menu configuration, then you can configure only the **Top Menu** ▦ node and ignore the **Search Field** 🔍 , **Welcome Panel** ▦ , and **Navigator Menu** ▤ nodes.

To create a new guide page to the existing guide page project:

1) In the explorer, click the arrow 🔽 for the guide page project node ⚙ and select **Add Guide Page**. The new guide page ▦ is added to the explorer.

2) Click the new guide page ▦ in the explorer and edit the **Name** attribute in the attribute window. The name must be unique.

3) If custom help content should be available for the guide page via the automated assistant capability, enter the URL or server variable that targets the content to display in the assistant in the **Automated Assistant URL** attribute. For more information about configuring the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

4) Click the **Save** button to save the guide page definition.

You can use an existing guide page that is already configured and designed as a template to create a new one. The entire configuration will be copied to the new guide page and can be modified, as needed. To copy an existing guide page in order to create a new guide page.

1) In the explorer, click the arrow ▼ for the guide page ▦ node that you want to copy and select **Copy**.

2) Click the arrow ▼ for the guide page project node ⚙ and select **Paste**. A new guide page is added to the explorer with the name **Copy (x) of <TemplateName>**.

⚠️ When you use the **Copy** and **Paste** functionalities, the copied guide page will overwrite the guide page that you are copying to. If the guide page that you are copying to has any configured elements (such as a search field, welcome panel, etc.) these too will be overwritten.

3) Click the new guide page in the explorer and edit the **Name** attribute in the attribute window. The name must be unique.

4) Click the **Save** button to save the guide page definition.

Alternatively, you can also copy the guide page configuration from the current guide page project, although please be aware that the copied guide page project will overwrite your the guide page project that you are copying to. To do so, after you have created the new guide page in the new guide page project, click the **Open Current Guide Page Project** button. Confirm the warning message about this by click **Yes**. Click the **Save** button to save the guide page definition. To update the styles to the new guide page, select any guide page project in the **Select Guide Page Project** field and then reselect the guide page project that you are specifying the guide page for in the **Select Guide Page Project** field.

Designing the Welcome Panel

The welcome panel allows you to configure an overall title, text, and image to display for the guide page and can be designed to align with your corporate branding.

The welcome panel does not need to be explicitly created for a guide page. It is available per default. If the welcome panel is not configured, it will simply be displayed as a white space in the main area of the view. You can configure a welcome panel and copy it to some or all other guide pages to provide a consistent look-and-feel or you can configure a different welcome panel for each guide page. The welcome panel is divided into three sections:

• The **Welcome Name Cell** section on the left

• The **Welcome Description Cell** section in the center

- The **Welcome Logo Cell** section on the right

To configure the welcome panel, you must first configure the width of the three sections **Welcome Name Cell**, **Welcome Description Cell**, and **Welcome Logo Cell**. The width of the sections is configured in CSS style definitions. You can alter the size of the sections as well as remove the **Welcome Name Cell** or **Welcome Logo Cell** section by configuring a width of zero for the respective section. Please note that the size of the **Welcome Description Cell** section cannot be explicitly defined. The **Welcome Description Cell** section is automatically calculated based on the available screen size and the size definitions for the **Welcome Logo Cell** section and the **Welcome Name Cell** section.

To specify the content of the welcome panel:

1) Go to the guide page [icon] node that you want to configure and click the welcome panel [icon] node to open its attribute window.

2) Specify the **Welcome Name Cell** section on the left. You can define either text (**Welcome Name** attribute) or an image (**Name Picture** attribute). If both attributes are specified, only the image specified in the **Name Picture** attribute will be displayed. Define one of the following:

- **Welcome Name Text**: Enter a name or short text to display in the welcome name cell, or

- **Welcome Name Picture**: Select an image to upload to the welcome name cell.

- **Welcome Name Picture Alt**: This attribute is only necessary if you a user will be working with the screen reader capability provided in conjunction with JAWS® for Windows® software in order to support visually impaired users. Provide a text to be read aloud by the screen reader capability to describe the image displayed in the welcome name cell.

3) Specify the **Welcome Description Cell** section in the center.

- **Welcome Description**: Enter text for the **Welcome Description** section.

- **Welcome Description Accessibility Text**: This attribute is only necessary if a user will be working with the screen reader capability provided in conjunction with JAWS® for Windows® software in order to support visually impaired users. Provide a text to be read aloud by the screen reader capability to describe the welcome panel.

- **Welcome Description Text Alignment**: Select the alignment of the welcome description text from the drop-down list.

- **Welcome Description Background Image**: Select an image to upload and display as a background image in the welcome description cell.

- **Repeat Description Image** : Select `True` if you want the background images to be repeated endlessly within the welcome description section. It is useful to repeat the background image to make sure that the whole welcome description area is filled with the background image even if a very large screen is used to display the guide page. It is also useful to reduce the size of the guide page project by using a very small image to fill a large area with one color or the same background structure.

- **Logo**: Select an image to display in the welcome logo cell.

- **Logo Image Alt**: This attribute is only necessary if a user will be working with the screen reader capability provided in conjunction with JAWS® for Windows® software in order to support visually impaired users. Provide a text to be read aloud by the screen reader capability to describe the image displayed in the logo cell.

- **Logo URL**: Enter a URL that will open in a new window if a user clicks on the logo image (for example, http://www.yourcompany.com). The URLs defined for the guide pages must conform to current URL standards.

4) Click the **Save** button to save welcome panel definition.

5) To design the visualization of the navigator menu, expand the **CSS Styles** 🖊 node and configure the following CSS styles, as needed:

- **Welcome Pane**

- **Welcome Name Cell**

- **Welcome Description Cell**

- **Welcome Logo Cell**

For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

6) Click the **Save** button to save the style definitions.

Designing the Navigator Menu and Topic Pages

The configuration of the navigator menu includes the navigation menu on the left side of the guide page and optionally a topic page in the main area of the guide page.
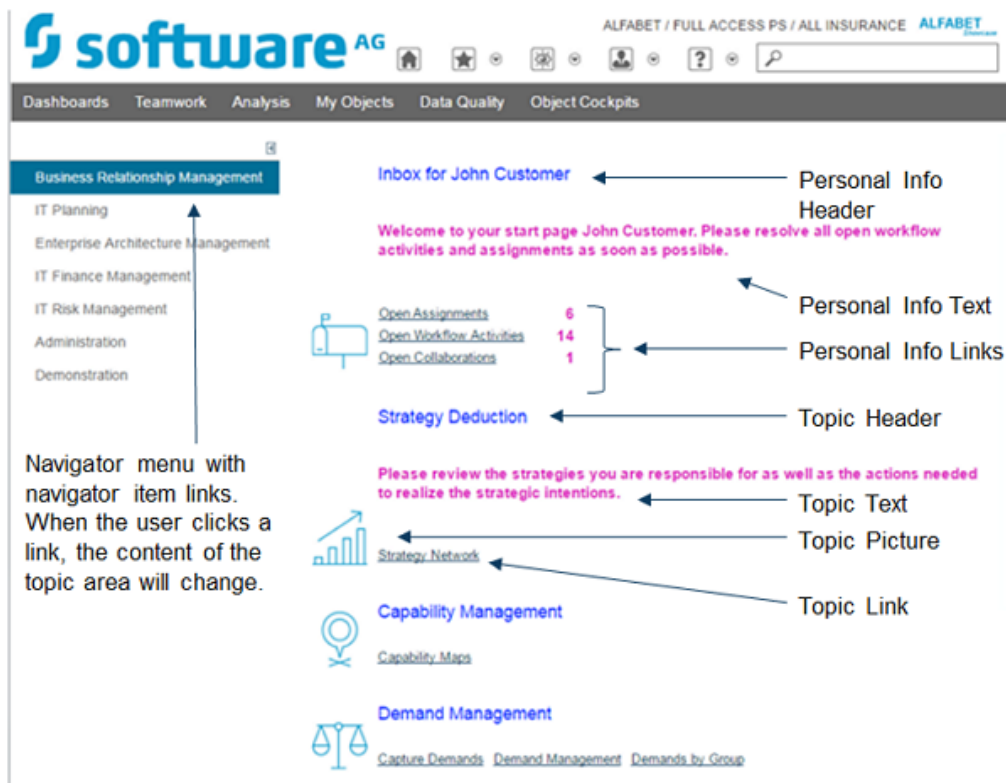
FIGURE: Example for navigator menu and topic page structure

The navigator menu panel typically contains a set of items that look like buttons. These elements may be either application links or navigator items. The navigator menu panel on the left may display any of the following:

- One or more application links that when clicked link directly to a functionality, standard view, configured report, or standard or configured object profile or guide view in Alfabet.

- One or more navigator items that when clicked open a topic page on the right.

- One or more navigator items that have subordinate navigator items and/or application links below. An expand/collapse arrow is displayed next to the navigator item if a subordinate navigator item or application link is available. An unlimited number of levels is possible in the navigator item hierarchy. Each navigator item in the hierarchy may have a different topic page.

Each navigator item may have one or more topics configured for the topic page area to the right of the navigator pane. A topic may display any of the following:

- Title

- Descriptive text

- Image

- One or more application links

- One or more internal links

- One or more external links

- One or more Help links

- One or more document links

- Embedded configured report or standard view

- One or more subordinate topics

Please note that you can create application links on the top-level of the navigator menu, as a sub-item of a navigator item, or in a topic. The links may target a functionality, standard view, configured report, or standard or configured object profile or guide view in Alfabet. A topic cannot be configured for an application link.

The design aspects of the navigator menu and topic pages are specified by means of CSS style definitions. For more information, see the section Formatting and Designing the Guide Pages.

⚠️ When you use the **Copy** and **Paste** functionalities, the copied navigator menu will overwrite the navigator menu that you are copying to. If the navigator menu that you are copying to has any subordinate navigator items or application links, these will also be overwritten.

The following information is available:

- Creating and Sequencing Navigator Items and Subordinate Navigator Items

- Creating Topics for the Topic Page of a Navigator Item

  - Adding an Application Link to a Topic

  - Adding an Internal Link to a Topic

  - Adding an External Link to a Topic

  - Adding a Help Link to a Topic

  - Adding a Document Link to a Topic

Creating and Sequencing Navigator Items and Subordinate Navigator Items

You can define a flat list of navigator items or structure the navigator items in a hierarchy with one level of subordinate navigator items and/or applications links. If you create a hierarchy of navigator items, the top-level menu items will be displayed in the navigator menu panel and with an expand/collapse arrow to indicate that subordinate navigator items/application links exist. Users can click the expand arrow to see the next level in the hierarchy.

Each navigator item in the hierarchy may have a different topic page.

There are two copy and paste mechanisms that differ from the mechanisms described above:

- You can copy a navigator item and paste it to the **Navigator Menu** node of the explorer. The navigator item is then added to the top-level navigator items of the navigator menu as the last element without overwriting any existing navigator elements.

- You can create an empty navigator item and paste a copied navigator item to it.

To create navigator menu items:

1) Click the arrow for the **Navigator Menu** node and click **Add Navigator Item**. A new navigator item is added below the **Navigator Menu** node.

   (i) Alternatively, you can use the copy and paste functionalities to create new navigator menu items. Please note that if you copy a navigator item, the topics of the navigator item are not simply copied, but a referenced copy is created. If you change a topic for one navigator item, both the original and the copy will be changed. Furthermore, you can only copy a navigator item to another navigator item of the same type. For example, if you copy a navigator item with a topic based on an external link, you can only paste it to another navigator item with a topic based on an external link. You cannot only paste it to another navigator item with a topic based on an internal link, for example. Both the original and the copies of any referenced topics defined for the navigator items will be displayed in blue in the explorer of the Guide Pages Designer. The following is possible:

      1) Click the navigator item that you want to copy and select **Copy**, create a new navigator item and click it, and select **Paste**.

2) Click the navigator item ▭ that you want to copy and select **Copy**, and click the

 Navigator Menu ▦ node and select **Paste**. The navigator item is added to the top-level navigator items of the navigator menu.

3) Enter a caption for the navigator item in the **Text** field and a tooltip in the **Tooltip** field.

⚠ Please note that you should not use the ampersand character nor the HTML entity specification for the ampersand character as a substitute for the word "and" in the Text field for a top-level menu item.

4) Create all top-level navigator items as described above.

5) Define the sequence of the top-level navigator items in the menu bar: Click the **Navigator Menu** ▦ node and click the **Items** attribute in the attribute window to open the **Sort Entries** editor. Reorder the menu items using the up and down arrows and click **OK** to save your changes.

6) For each relevant top-level navigator item, click the arrow ▾ for the parent navigator item ▭ and select **Add Sub-Item** to add a subordinate navigator item and define its the **Text** field and a tooltip in the **Tooltip** field. Optional: You can create an application link as a subordinate item for a navigator item. For more detailed information about configuring application links, see the section Adding Application Links to the Navigator Menu or to a Topic.

7) Once all sub-items have been created for a navigator item, define their sequence in the drop-down menu by clicking the parent navigator item ▭ node and clicking the **Sub-Items** attribute in the attribute window to open the **Sort Entries** editor. Reorder the sub-items using the up and down arrows and click **OK** to save your changes.

8) A topic page is automatically available for each navigator item. If relevant, define the **Topic Page Header** attribute and **Topic Page Text** attribute for each navigator item. For more information about adding one or more topics to the topic page, see the section Creating Topics for the Topic Page of a Navigator Item.

9) Click the **Save** button to save the top-level menu items and sub-items.

Creating Topics for the Topic Page of a Navigator Item

A topic page is automatically available for each navigator item. Each navigator item may have one or more topics configured for the topic page area to the right of the navigator pane. All elements that can be configured for a topic are optional.
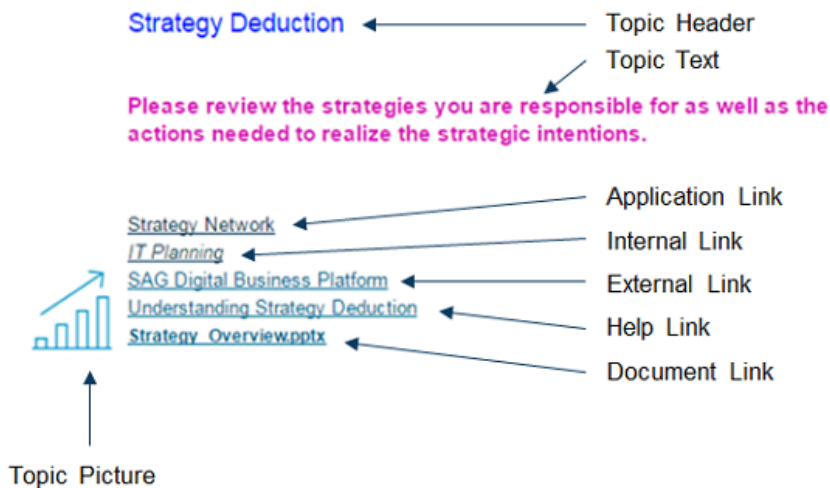
FIGURE: Navigator item with one single topic and multiple links

A topic may display any of the following:

- Title

- Descriptive text

- Image

- One or more application links

- One or more internal links

- One or more external links

- One or more Help links

- One or more document links

- Embedded configured report or standard view

- Subordinate topics with any of the above

You can configure a navigation item to have just a one topic with or without sub-topics, or multiple topics with or without sub-topics. Although it is possible to create multiple levels in the topic hierarchy, it is highly recommended for the sake of usability that you have only two levels in the topic hierarchy. If multiple levels are necessary in a topic hierarchy, you should consider reconceptualizing the design and layout of the guide page by distributing the information over several navigator items, for example.
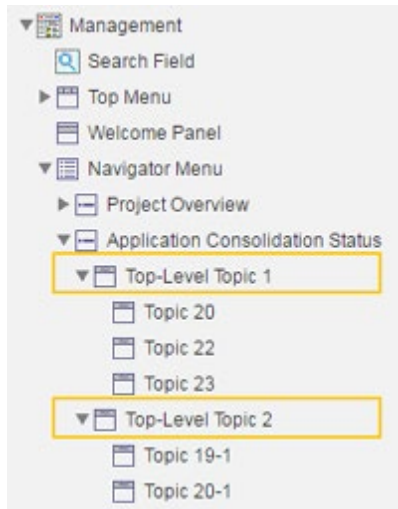
FIGURE: Hierarchy of topics configuration in Guide Page Designer

Although there is little technical difference in terms of the contents that can be displayed in a topic vs. a sub-topic, you should be aware that top-level topics are distributed vertically in the view and sub-topics are distributed horizontally in the view. In the example, two top-level topics have been defined for the navigator item. Top-Level Topic 1 and Top-Level Topic 2. Top-Level Topic 1 hast three sub-topics and Top-Level Topic 2 has two sub-topics.

Please note that besides the issue of vertical vs. Horizontal placement and the border color assignment, there is little technical difference between a topic vs. a sub-topic and both may contain any of the possible configurations listed in the bulleted list above. The content of each topic/sub-topic may differ so that you may have some topics with just informational texts, for example, whereas other topics can have with embedded reports and yet others can have links to documents.
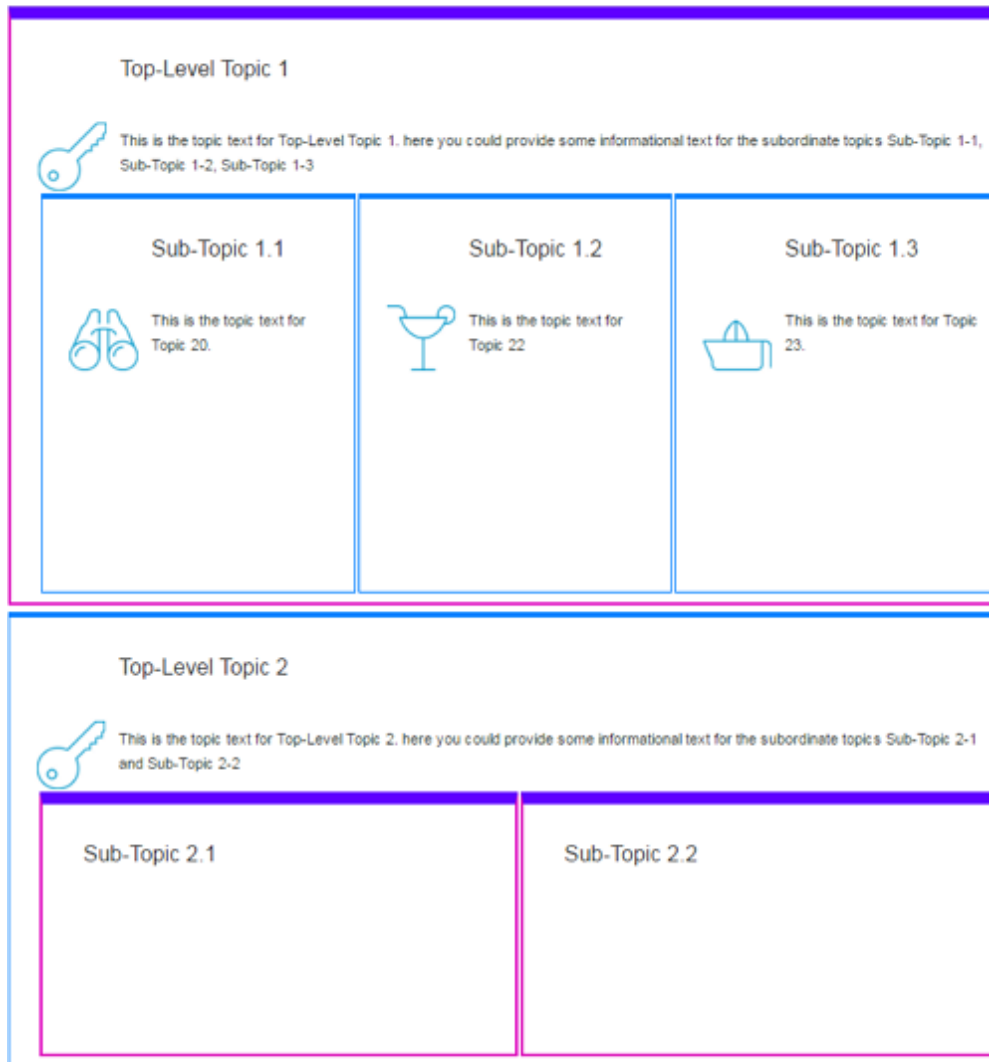
FIGURE: Configuration of guide page with topics and sub-topics

In the preview area of the Guide Pages Designer, the sub-topics are placed within the frame of their parent topic. In the example, the borders of the frames are colored as specified in the configuration. This will be replicated when displayed in the Alfabet interface, although you have the option to specify that the borders are not visible.

The example also shows that the top-level topics have a topic header, an image, and a descriptive text. The sub-topics in Top-Level Topic 1 also have a topic header, an image and descriptive text. The sub-topics in Top-Level Topic 2 only display a topic header. Per default, the width of each sub-topic is relative in comparison to the parent topic. In the example above, the sub-topics have equal width but you may choose to change the default specification and explicitly define the relative width of each sub-topic in your configuration.

What is not visible in the preview area shown above is that all sub-topics have reports embedded in them, which is specified via the attributes of the topic, as described in the section Embedding a Configured Report in a Topic.
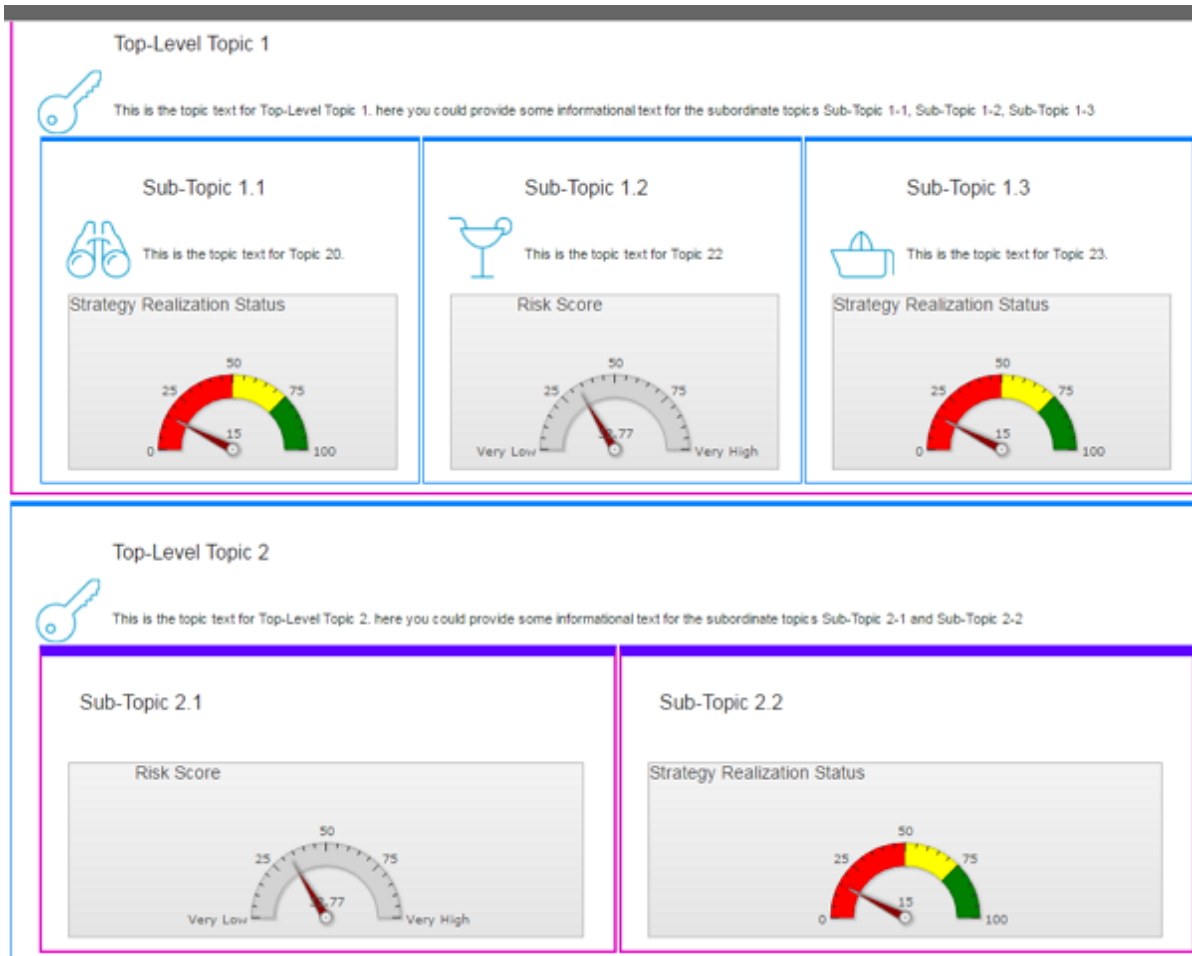
FIGURE: Display of topic/sub-topic configuration in user interface

The example above shows that graphic reports are embedded in each sub-topic. Please note that if multiple configured reports are embedded in a topic/sub-topic, the configured report should be simple configured reports, such as the gage reports displayed above. More complex visualizations such as matrix reports cannot be meaningfully displayed in such a small space.

Please keep the following in mind when configuring the layout of a topic with sub-topics:

- The borders of the topics are automatically sized. Therefore, the images placed in the sub-topics should be of equal size, otherwise the size of the sub-topic frames may differ and will need to be manually adjusted.

- The height of embedded reports are relational to the width of the sub-topic frame. In the example above, the configured reports for all sub-topics in Top-Level Topic 1 had the **Included Object Height** attribute set to a value of 150, whereas the configured reports for all sub-topics in Top-Level Topic 2 had the **Included Object Height** attribute set to a value of 300. As a result, the content of the embedded reports appear the same in the user interface.

- The width of sub-topics is automatically generated per default and is relative to the width of the parent topic. The width of a sub-topic may be explicitly defined in the **Sub-Topic Column Width** attribute.

- Two styles can be defined for the borders used to frame topics/sub-topics. You can specify which border to use for each individual topic and sub-topic in the CSS styles **Topic Frame**

and **Sub-Topic Frame**. The definitions can be assigned to the topics/sub-topics (regardless of their hierarchical level) via the **Frame Style to Use** attribute for each topic. The **Switch Off Frame Border** attribute can be selected if the border should be invisible for a topic/sub-topic.

To create a topic for a topic page:

1) Click the arrow 🔽 for the navigator item 🔲 and select **Create Topic**. A topic 🔲 is displayed below the navigator item.

> ℹ️ Alternatively, you can use the copy and paste functionalities to create new topics. Please note that if you copy a topic, the topic is not simply copied, but a referenced copy is created. If you change a topic, both the original and the copy will be changed. In this way, you can use referenced topics to reduce the effort for editing the guide pages. Referenced topics do not display the conventional icon for the topic (🔲), but instead display an icon for a referenced topic 🔲. Please note that if you delete links from a referenced topic, it will also be deleted from all related referenced topics. However, if you delete the entire referenced topic from a navigation item, the referenced topics will not be deleted. Both the original and the copies of referenced topics will be displayed in blue in the explorer of the Guide Pages Designer.
>
> Alternatively, you can create a reference to an existing topic by clicking the arrow 🔽 for the navigator item 🔲 and selecting **Add Topic**. An editor with all existing topics is displayed. Select a topic and click **OK**. The topic is added as referenced topic related to the original topic. Both the original and copy are displayed in blue in the explorer.

2) In the attribute window, edit the following fields, as needed:

- **Name**: Enter a technical name of the topic displayed in the Guide Pages Designer. This will not be displayed in the Alfabet interface.

- **Topic Header**: Enter a text for the topic headline.

- **Topic Picture**: Select an image to display on the right side of the topic. Please note that the picture will not be automatically re-sized by the Guide Pages Designer. If a picture is not imported in the desired size for display, expand the **CSS Styles** 🖊 node, click the **Topic Picture Cell** 🖊 node, and redefine the **Width** attribute to increase or decrease the picture as needed. You can remove the picture by clicking the **Clear** ✖ button in the attribute field.

- **Topic Text**: Enter a text providing an explanation about the topic page. Refine the layout by adjusting the **Topic Text** 🖊 node below the **CSS Styles** node 🖊.

- **Stacked Link Layout** : If you are adding application links, internal links, external links, Help links, or document links, you can specify whether they should be displayed next to each other (horizontally) or displayed below one another each on a new line (vertically). Select `False` to display all links in a horizontal orientation or select `True` to display links in vertical orientation.

- **Included Object Height**: If you have included a report or graphic view in the topic/sub-topic, adjust the height of the embedded object in relation to the width of the sub-topic frame.

- **Sub-Topic Column Width**: If the topic is a sub-topic, you may explicitly define the width of the sub-topic relative to the width of the parent topic. If this attribute is not defined, the sub-topic width will be automatically generated relative to the width of the parent topic.

- **Frame Style to Use**: Select the frame style to use for the topic/sub-topic, or select the **Switch Off Frame Border** attribute to hide the border for the topic/sub-topic. The frame styles that you select must be configured via the CSS styles **Topic Frame** and **Sub-Topic Frame**.

3) Click the **Save** button to save the topic.

4) Once all topics have been created for a navigator item, define their sequence in the drop-down menu by clicking the navigator item node and clicking the **Topics** attribute in the attribute window to open the **Sort Entries** editor. Reorder the topics using the up and down arrows and click **OK** to save your changes.

5) To design the visualization of the topic pages and topics, expand the **CSS Styles** node and configure the following CSS styles, as needed:

- **Topics Page Cell**

- **Topics Page Header**

- **Topics Page Text**

- **Topic Cell**

- **Topic Frame**

- **Sub-Topic Frame**

- **Topic Header**

- **Topic Picture Cell**

- **Topic Text Part Cell**

- **Topic Text**

- **Topic Links Cell**

Please note that the CSS configuration applies to all topic pages/topics. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

6) Click the **Save** button to save the style definitions.

Adding an Application Link to a Topic

Click the arrow for the topic that you want to create an application link for and select **Add Application Link**. The link may target a functionality, standard view, configured report, or standard or configured object profile or guide view in Alfabet. For detailed information about configuring an application link for a topic, see the information provided in the section Adding Application Links to the Navigator Menu or to a Topic.

Adding an Internal Link to a Topic

By adding an internal link, you can define a link that will open the topic page configured for a navigator item.

1) Click the arrow for the topic and select **Add Internal Link**. The attribute window is updated with attributes relevant for an internal link.

2) In the **Text** field in the attribute window, enter the caption of the link that should be displayed in the topic.

3) In the **Tooltip** field, enter a tooltip text that the user will see when moving the cursor over the link.

4) In the **Navigator Item** field, select an existing navigator item of your guide page as target of the internal link.

5) Click the **Save** button to save the internal link defined for the topic.

6) To design the visualization of the internal links, configure the CSS style **Internal Link**. Please note that the CSS configuration applies to all internal links. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Adding an External Link to a Topic

By adding an external link, you can define a link that will open a URL.

1) Click the arrow 🔻 for the topic 🗔 and select **Add External Link**. The attribute window is updated with attributes relevant for an external link.

2) In the **Text** field in the attribute window, enter the caption of the link that should be displayed in the topic.

3) In the **Tooltip** field, enter a tooltip text that the user will see when moving the cursor over the link.

4) In the **External URL** field in the attribute window, specify the external URL that shall open in a new window when the user clicks the link in the menu.

- Links to URLs defined for the guide pages must conform to current URL standards.

- Links to URLs defined for the guide pages must exclusively consist of ASCII characters. If, for example, you want to link to a configured report designed in Alfabet Expand, the name of the report must not contain any non-ASCII characters.

5) Click the **Save** button to save the external link defined for the topic.

6) To design the visualization of the external links, configure the CSS style **External Link**. Please note that the CSS configuration applies to all external links. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Adding a Help Link to a Topic

By adding a Help link, you can define a link that will open a standard or customized Alfabet Help file.

1) Click the arrow 🔻 for the topic 🗔 and select **Add Help Link**. The attribute window is updated with attributes relevant for a Help link.

2) In the **Text** field in the attribute window, enter the caption of the link that should be displayed in the topic.

3) In the **Tooltip** field, enter a tooltip text that the user will see when moving the cursor over the link.

4) In the **File Path** field in the attribute window, specify the path to the Help document. The path should be reflect the relevant language folder according to the location of the Help files as specified in the **Help Server** attribute in the server alias settings. For more information, contact your system administrator.

5) Click the **Save** button to save the Help link defined for the topic.

6) To design the visualization of the help links, configure the CSS style **Help Link**. Please note that the CSS configuration applies to all help links. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Adding a Document Link to a Topic

By adding a document link, you can define a link that will open a document stored in the **Internal Document Selector**. You can add a link to all documents in the **Internal Document Selector** except for the documents stored in the SYSTEM folder. The SYSTEM folder is reserved for system documents related to specific functionalities in Alfabet. For more information about making documents available to the user community, see the section *Uploading Documents and Managing User Permissions to Document Folders in the Internal Document Selector* in the reference manual *User and Solution Administration*.

ⓘ Please note that files must be stored in the **Internal Document Selector** to be used in the Guide Pages Designer. Files used in the Guide Pages Designer cannot be stored on an external file system.

⚠ Please note the following:

- The SYSTEM folder is reserved for system documents related to specific functionalities in Alfabet. You should not make any manual changes to the SYSTEM folder unless explicitly advised.

- Style sheets referenced in the context of object cockpits, wizards steps, HTML templates, etc. may not be stored in the root folder of the **IDOC** explorer. Stylesheets stored in the **Internal Document Selector** must be located in a document folder that is subordinate to the root folder of the **IDOC** explorer.

- For security reasons, a blacklist and whitelist concept has been introduced to restrict the uploading and downloading of files with permissible file extensions in Alfabet. An error message will be displayed f a user attempts to upload or download an impermissible file extension type. For more information about restricting file extensions, see the section *Specifying the Permissible File Extensions for Uploading/Downloading Files* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- Please note that the following file types cannot be opened directly in Alfabet and will be automatically saved and downloaded as a ZIP file even if not defined in the blacklist or additionally defined in the whitelist:.com,.bat,.exe,.ad,.adprototype,.asax,.ascx,.ashx,.asmx,.asp,.aspx,.axd,.browser,.cd,.compiled,.config,.cs,.csproj,.dd,.exclude,.java,.jsl,.ldb,.ldd,.lddprototype,.ldf,.licx,.master,.mdb,.mdf,.msgx,.refresh,.rem,.resources,.resx,.sd,.sdm,.sdmDocument,.sitemap,.skin,.soap,.svc,.vb,.vbproj,.vjsproj,.vsdisco, and.webinfo. A GUID extension will be added to the file name of the ZIP file.

1) Click the arrow ▼ for the topic 🗔 and select **Add Document Link**. The attribute window is updated with attributes relevant for a document link.

2) In the **Text** field in the attribute window, enter the caption of the link that should be displayed in the topic.

3) In the **Tooltip** field, enter a tooltip text that the user will see when moving the cursor over the link.

4) In the **Document Path** field in the attribute window, enter the path to the document in the **Internal Document Explorer**. The path has to start with IDOC:\ and define the full path under the IDOC node of the **Internal Document Selector** including the file name and extension.

> ⓘ To evaluate the link structure in the **Internal Document Selector**, you can open the **Internal Document Selector** in the Alfabet interface. The **Internal Document Selector** opens when you use the **New** > **Add Document** option in the **Attachment** page view in the object profile of an object or in the **Internal Documents** functionality available via the **Admin** user profile.

5) Click the **Save** button to save the document link defined for the topic.

6) To design the visualization of the document links, configure following CSS style **Document Link**. Please note that the CSS configuration applies to all document links. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Embedding a Configured Report in a Topic

A configured report can be embedded per topic in the topic page. If a configured report or view is embedded in the topic page, it is advised that you display only one topic for the topic page. If you plan to implement two topics, each with a configured report/standard view embedded in it, then you must adjust the height of each embedded view to ensure that the views are adequately displayed.

> ⚠ Please note the following:
>
> • A configured report embedded in or linked to a guide view/guide page will be accessible via the user profile that the guide page project is assigned to, regardless of the authorization defined for the configured report.
>
> • Please note that console reports cannot be embedded in a topic page. If the inclusion of a console report is necessary for the topic page, you can specify an application link to target the console report. For more information, see the section Adding Application Links to the Navigator Menu or to a Topic. For more information about the specification of console reports, see the section *Creating Configured Reports That Are Containers for Multiple Configured Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The embedded report or view is not visualized in the context of the Guide Pages Designer. To review the visualization and size of the embedded view, you must save the project to the database as described in the section Reviewing or Implementing the Guide Page Project in the Alfabet Solution and review the guide page in the context of the Alfabet interface.

The configured report must first be created by your solution designer in the configuration tool Alfabet Expand. For more information, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To embed a configured report in a topic:

1) Click the topic ▭ to open its attribute window.

2) In the **Included Object Type** field in the attribute window, select **Report**. The attribute window is updated with attributes relevant for a configured report.

3) If the configured report should be applied to an object class, you can limit the results of the report to a specific object of this class. In the **Included Object Arguments** field, specify the REFSTR property of the corresponding object with the entry: *ContextArgs=<REFSTR of object>*.

> The REFSTR property is not displayed on the Alfabet user interface. You can read the REFSTR of objects from the Alfabet database using Alfabet query language or native SQL queries, or by directly searching in the Alfabet database with SQL-based queries.

4) In the **Included Object Height** field, specify the height of the report. A value of 400-600 pixels is recommended if only one topic with an embedded report is configured for the topic page.

5) Click the **Save** button to save the configuration of the sub-item.

Embedding a Standard View in a Topic

Only page views associated with an explorer root node or functionality (Business Function) can be embedded in a topic. It is not possible to show results about a selected object and therefore you cannot embed a page view implemented in an object view. For an overview of page views assigned to explorer root nodes, see *Page Views Assigned to Explorer Root Nodes* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.

To embed a standard Alfabet view in a topic:

1) Click the topic ▭ to open its attribute window.

2) In the **Included Object Type** field in the attribute window, select **GraphicView**. The attribute window is updated with attributes relevant for a graphic view.

3) In the **Included Object Height** field, specify the height of the view. A value of 400-600 pixels is recommended if only one topic with an embedded view is configured for the topic page.

4) Click the **Save** button to save the configuration of the sub-item.

Adding Application Links to the Navigator Menu or to a Topic

You can create application links on the top-level of the navigator menu, as a sub-item of a navigator item, or in a topic. The links may target a functionality, standard view, configured report, or standard or configured object profile or guide view in Alfabet.

Please note that a topic page cannot be configured for an application link that is configured to be part of the navigator menu. If an application link is configured to be displayed in the navigator menu, the topic page area will remain empty.

The following information is available:

- [Defining a Link to a Functionality](#)

- [Defining a Link to a Configured Report](#)

- [Defining a Link to a Standard or Configured Object View](#)

- [Defining a Link to a Standard Page View](#)

Defining a Link to a Functionality

> ⓘ Please note that for any standard or custom business functions assigned to an administrative user pro-file, the **Restrict to Administrative User Profiles** must be set to `True` for a standard business function or custom explorer if only users with an administrative user profile may access the business function. For more information about configuring standard business functions and custom explorers, see the chapter *Configuring Standard Business Functions and Custom Explorers* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To configure a link to an Alfabet functionality

1) Click the arrow ▼ for the navigator menu element that you want to create an application link for and select **Add Application Link**. The application link ➡ is added below the navigator menu element. Click the application link ➡ to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `BusinessFunction`. The attribute window is updated with attributes relevant for a functionality.

3) In the **Business Function** field, select the Alfabet functionality that you want to link to.

4) If you have specified any of the functionalities listed below, you must specify arguments to define the link target in the **Application Link Arguments** field. The syntax for this entry is *<Type of Argument>=<Value of Argument>* (for example:`Explorer=COMG_Explorer` or `Class=Application`):

   - **Simple Search** functionalities (`GenericSearch`, `Simple_Search`, `Browse`):

     - If the search functionality should be limited to a set of object classes, specify the object class names in a comma-separated format with the argument `ContextArgs=` *<ObjectClassName>*. For example, to search for an object in the object classes `Application`, `Component`, and `ICTObject`, enter the following:
       `ContextArgs=Class:Application,Component,ICTObject.`

     - If the search functionality should be limited to a set of object classes and object class stereotypes, specify the object class stereotype in the comma-separated list as: *<ObjectClassName>:<ObjectClassStereotypeName>.* For example, to include the application stereotypes `BusinessApplication` and `TechnicalApplication` in the list, enter:
       `ContextArgs=Class:Application:BusinessApplication,Application:Technica lApplication,Component,ICTObject.`

   - **Capture Projects** functionalities (`PRJ_CaptureProjects` and `PRJ_CaptureProjects_Ex`): If the functionalities should open with the filter preset to a defined project stereotype. You must specify the project stereotype with the entry `ContextArgs=` *<ProjectStereotypeName>*. For example, `ContextArgs=ProjectStep`.

- **Generic Object Viewer** functionality (`GenericObjectViewer`): You must provide information about which object class can be searched via the Edit Search interface control. You must specify the object class name with the entry `ContextArgs=Class:` *<ObjectClassName>*. For example, `ContextArgs=Class:Application`.

- If you set a link to a functionality that includes sub-functionalities (for example, the functionalities **Define Business Standards** (`Business_Standards`) and **Define IT Standards** (`IT_Standards`), you must specify which sub-functionality should be accessed. If no sub-functionality is assessed, the default sub-functionality will be automatically displayed. In the case of the functionalities **Define Business Standards** (`Business_Standards`), this would be `BO_Explorer`. In the case of **Define IT Standards** (`IT_Standards`), this would be `COM_Explorer`. The syntax to specify the sub-functionality is *<Type of Argument>=<Value of Argument>*. For example, for the functionality `CostManagement`, you could specify either `ContextArgs=Explorer:COSTCG_Explorer` or `ContextArgs=GraphicView:COSTC_Overview`: To determine which functionalities have sub-functionalities, see the chapter *Business Functions and Their Sub-Functionalities* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.

5) Click the **Save** button to save the configuration of the navigator menu element.

Defining a Link to a Configured Report

The configured report must first be created by your solution designer in the configuration tool Alfabet Expand. For more information, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*

To configure a link to a configured report:

1) Click the arrow ▼ for the navigator menu element that you want to create an application link for and select **Add Application Link**. The application link ⬚ is added below the navigator menu element. Click the application link ⬚ to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `Report`. The attribute window is updated with attributes relevant for a configured report.

3) If you set a link to a configured report defined to be applied to an object class, you can limit the results of the report to a specific object of this class. In the **Application Link Arguments** field, specify the `REFSTR` property of the corresponding object with the entry: *ContextArgs=<REFSTR of object>*.

> ⓘ The `REFSTR` property is not displayed on the Alfabet user interface. You can read the `REFSTR` of objects from the Alfabet database using Alfabet query language or native SQL queries, or by directly searching in the Alfabet database with SQL-based queries.

If the link to the configured report is added to a guide view, filter field values can also be provided in the **Application Link Arguments**. The corresponding filters of the configured report are then preset to the defined values and the configured report opens with the filters already set. For

4) Click the **Save** button to save the configuration of the navigator menu element.

Defining a Link to a Standard or Configured Object View

Whether the link will open an object profile or object cockpit will depend on the configuration of the object view. For more information about configuring object views and object cockpits, see the chapter *Configuring Object Views* in the reference manual *Configuring Alfabet with Alfabet Expand*.

1) Click the arrow for the navigator menu element that you want to create an application link for and select **Add Application Link**. The application link is added below the navigator menu element. Click the application link to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `ObjectView`. The attribute window is updated with attributes relevant for an object view.

3) In the **Object Profile** field, select the object view that you want to link to.

4) In the **Base Object** field, enter the value of the `REFSTR` property of the object for which the object view shall open.

> (i) The `REFSTR` property is not displayed on the Alfabet user interface. You can read the `REFSTR` of objects from the Alfabet database using Alfabet query language or native SQL queries, or by directly searching in the Alfabet database with SQL-based queries.

5) Click the **Save** button to save the configuration of the navigator menu element.

Defining a Link to a Standard Page View

Only page views associated with an explorer root node or functionality (Business Function) can be specified as a link for a navigator menu element. It is not possible to show results about a selected object and therefore you cannot link a page view implemented in an object view. For an overview of page views assigned to explorer root nodes, see *Page Views Assigned to Explorer Root Nodes* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.

1) Click the arrow for the navigator menu element that you want to create an application link for and select **Add Application Link**. The application link is added below the navigator menu element. Click the application link to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `GraphicView`. The attribute window is updated with attributes relevant for a graphic view.

3) In the **Graphic View** field, select the graphic view that you want to link to.

4) Click the **Save** button to save the configuration of the navigator menu element.

Adding the Personal Info Section to the Topic Page

The personal info topic allows you to add a predefined topic section to the topic page with a personal message and information about the number of current assignments and workflow activities that they are responsible for as well as the collaboration topics that they have been invited to participate in. The personal info topic is configured in the **Personal Info (Design)** node. You can configure a header, descriptive text, and image to be displayed for the topic as well as the text and color of the link. In order to make the text more personalized, the variables `$CURRENT_USER` and `$CURRENT_PROFILE` can be used in the text to include the name of the currently logged in user or user profile.
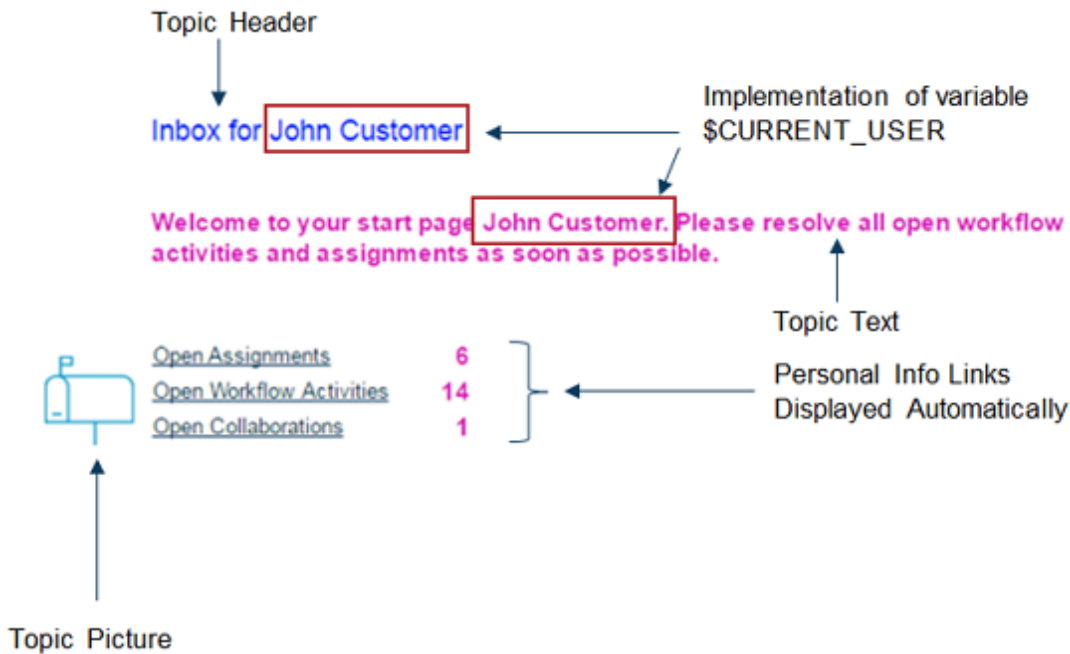
The information about the number of current assignments and workflow activities that they are responsible for as well as the collaboration topics that they have been invited to participate in is visualized as links that open the following views for the user:

- A link to the **My Assignments** page view that is displayed if the user has pending assignments.

- A link to the **My Workflow Activities** page view that is displayed if the user is responsible for active workflow steps or has a proxy responsibility for active workflow steps.

- A link to the **My Collaboration Topics** view that is displayed if the user has been invited to participate in a collaboration topic.

- A hyperlinked text that informs the current user about the number of Microsoft Teams® meetings due at the current date that he/she has initiated or been invited to via the Alfabet user interface. The link provides direct navigation to the **My MS Teams Meetings** functionality.

If the user has no assignments, workflow activities, Microsoft Teams meetings, or collaboration topics, the text **You have no pending tasks** will be automatically displayed. If you do not define customized text in the attributes **Custom String for Assignments**, **Custom String for Workflows**, **Custom String for MS Teams Meetings** and **Custom String for Collaborations**, then the standard preconfigured texts **Open Assignments <value>**, **Open Workflow Activities <value>**, **Today's MS Teams Meetings** and **Open Collaborations <value>** will be displayed. By means of the CSS styles, you can also configure the font color for the text **You have no pending tasks**. The configuration is used for all guide pages in the guide page project that you add a personal info topic to so that all personal info topics have the same design.

To design the **Personal Info** topic:

1) Click the **Personal Info (Design)** node directly below the root node.

2) In the attribute window, define the following fields:

- **Name**: The name of the personal info topic displayed in the Guide Pages Designer. This is not displayed anywhere on the Alfabet interface.

- **Topic Header** : Enter a text for the headline for the personal info topic. You can use the variables $CURRENT_USER and $CURRENT_PROFILE can be used in the topic header to include the name of the currently logged in user or user profile.

- **Topic Picture**: Select the image to be displayed to the right of the personal info topic. The picture is not resized by the Guide Pages Designer. If a picture is not imported in the desired size for display, the design of the topic page will be affected. You can remove the picture by clicking the

    Clear ✖ button in the attribute field.

    ⚠ The selected image is stored in the guide page project and the path to the image is displayed in the **Topic Picture** field. The path can NOT be copied to another topic! If the same picture is used for different topics, it must be uploaded separately for each topic.

- **Topic Text** : Enter a text providing additional information for the personal info topic. You can use the variables $CURRENT_USER and $CURRENT_PROFILE can be used in the topic text to include the name of the currently logged in user or user profile.

- **Custom String for Assignments** : Enter the text to display in the topic page to inform the user about the open assignments that he/she is responsible for. The variable {count} can be used in the string to display the number of currently open assignments. If this attribute is not defined, the default text **Open Assignments {count}** will be displayed.

    👁 For example, if you define:

    ```
    You have {count} open assignments!
    ```

    a user with 5 open assignments will see the following text in the topic:

    You have 5 open assignments!

- **Custom String for Workflows** : Enter the text to display in the topic page to inform the user about the workflow steps that he/she is responsible for. The variable {count} can be used in the string to display the number of currently open workflow steps. If this attribute is not defined, the default text **Open Workflows {count}** will be displayed.

    👁 For example, if you define:

    ```
    You must contribute to {count} workflows!
    ```

    a user with 9 open workflow tasks will see the following text in the topic:

    You must contribute to 9 workflows!

- **Custom String for MS Teams Meetings** : Enter the text to display in the topic page to inform the user about the Microsoft Teams meeting that he/she has been invited to or has scheduled and that are scheduled for the current date. The variable {count} can be used in the string to display the number of collaborations that the user is invited to. If this attribute is not defined, the default text **Open Collaborations {count}** will be displayed.

    👁 For example, if you define:

    ```
    You have {count} MS Teams meetings today.
    ```

    a user twith 4 MS Teams meetings will see the following text in the topic:

    You have 4 MS Teams meetings today.

- **Custom String for Collaborations** : Enter the text to display in the topic page to inform the user about the collaborations that he/she has been invited to. The variable `{count}` can be used in the string to display the number of collaborations that the user is invited to. If this attribute is not defined, the default text **Open Collaborations {count}** will be displayed.

For example, if you define:

```
You are currently participating in {count} collaborations.
```

a user that is involved in 4 collaborations will see the following text in the topic:

You are currently participating in 4 collaborations.

3) Click the **Save** button to save the configuration of the personal info topic.

4) To design the visualization of the personal info topic, configure the CSS styles **Personal Info Link** and **Personal info "No pending tasks" message**. Please note that the CSS configuration applies to the personal info topics in all topic pages. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

5) Click the **Save** button to save the style definitions.

6) Next, you must add the configuration of the personal info topic to all relevant topic pages. To do so, click the arrow 🔽 for navigator item 🔳 and select **Add Personal Info Topic**. The personal info topic 🔳 is displayed below the navigator item.

7) Click the **Save** button to save the configuration of the navigator menu element.

Removing Navigator Items, Application Links or Topics

To remove a navigator item, application link or topic from the navigator menu, click the arrow 🔽 for the element and select **Remove**.

Formatting and Designing the Guide Pages

Some of the formatting and style elements displayed in the guide pages are configured via the attribute window available for the guide page project whereas other design aspects are specified by means of CSS style definitions. For example, the appearance and behavior of the navigation menu or the alignment of texts in the topic pages is configured via the attributes available for the guide page project. Style issues such as the color and font size of links or text or the size and placement of images is specified by means of CSS style templates provided by Alfabet BD GmbH that require no previous knowledge of a markup language.

Please note that the configuration via both the guide page project as well as the CSS style definitions is valid for all guide pages in the guide page project:

The following information is available:

- Specifying the Visualization via the Guide Page Project Node

- Applying Style Definitions to Guide Pages

Specifying the Visualization via the Guide Page Project Node

Some of the graphic and style elements displayed in the guide pages are configured via the attribute window available for the guide page project root node whereas others are visualized by means of CSS style definitions. The configuration of the display is valid for all guide pages in the guide page project:

1) In the explorer, click the arrow [icon] for the guide page project node [icon] to open the attribute window.

2) Above the attribute window section, click the **Switch to Categories** [icon] button. Define the following fields in the attribute window:

- **Common** section:

  - **Name**: Edit the name of the guide page project, if necessary.

- **Design-Time Behavior**:

  - **Render Preview Area**: To render the preview area, click the checkbox field to enter a checkmark. To suppress the preview area, click the checkbox field to remove the checkmark. In some cases, you may want to suppress the display of the preview area. If, for example, a configured report is embedded or linked in a guide view/guide page and the query fails to execute properly, an error may occur. For more information, see the section Preventing the Rendering of the Preview Area.

- **Navigator Menu Appearance** section:

  - **Collapsed Bullet Image**: Select the image to display for navigator items containing sub-items when the sub-items are not displayed.

  - **Expanded Bullet Image Alt Text**: Enter the text to display instead of the icon specified in the **Expanded Bullet Image** attribute if the icon is not available. The text will also be read as description for the icon if a screen reader software is used.

  - **Draw Grid in Expansion**: To display grid lines in expanded menus, click the checkbox field to enter a checkmark.

  - **Collapsed Bullet Image**: Select the image to display for navigator items containing sub-items when the sub-items are not displayed.

  - **Expanded Bullet Image Alt Text**: Enter the text to display instead of the icon specified in the **Collapsed Bullet Image** attribute if the icon is not available. The text will also be read as a description for the icon if screen reader software is used.

  - **Leaf Bullet Image**: Select the image to display for application links and navigator items that do not contain sub-items.

  - **Leaf Bullet Image Alt Text**: Enter the text to display instead of the icon specified in the **Leaf Bullet Image** attribute if the icon is not available. The text will also be read as description for the icon if screen reader software is used.

- **Navigator Menu Behavior** section:

  - **Text Click Toggles Expand**: To specify the navigator item's sub-menu to open the link text if the navigator item is clicked, click the checkbox field to enter a checkmark. To specify that the sub-menu will only open when the icon in front of the navigator item is clicked, click the checkbox field to remove the checkmark.

- **Topics Layout** section:

  - **Center Topic Cell Columns**: To center the topic frame configured for a topic in a guide page in the guide page, click the checkbox field to enter a checkmark. To left-align the topic frame, click the checkbox field to remove the checkmark.

  - **Topic Header Alignment**: Select the alignment of the topic header from the drop-down list.

  - **Topic Picture Vertical Alignment**: Select the vertical alignment of the topic picture from the drop-down list.

- **Topics Pages Layout** section:

  - **Topic Page Header Alignment**: Select the alignment of the topic page header from the drop-down list.

  - **Topic Page Text Alignment**: Select the alignment of the topic page text from the drop-down list.

3) Click the **Save** button to save the specification of the guide page project.

Applying Style Definitions to Guide Pages

In the Guide Pages Designer, you can specify CSS style by means of CSS style templates provided by Alfabet BD GmbH that require no previous knowledge of a markup language. The CSS style definitions available allow you to configure the design of various aspects of the guide pages. For example, the style definitions allow you to change various aspects of the topic pages such as the color and font size of links, the personal info section, or the topic page header and text or the size and placement of images and text in the welcome panel. The style definition definitions are applied to all guide pages in your project, ensuring that the look-and-feel of the guide pages is the same among all pages.

Please note the following guidelines about working with the CSS style definitions:

- In general, the style definition ![icon] nodes are organized according to the navigation element that they are relevant for. For example:

  - **Welcome Panel**, **Welcome Name Cell**, **Welcome Description Cell**, **Welcome Logo Cell** allow you to design various aspects of the welcome panel.

  - **Navigator**, **Navigator Expand/Collapse Cell**, **Navigator Item**, etc. allow you to design various aspects of the navigator menu.

  - **Topics Page Cell**, **Topics Page Header**, **Topics Page Text**, **Topic Cell**, etc. allow you to design various aspects of the topics.

  - **External Link**, **Application Link**, **Personal Info Links**, **Internal Link**, **Help Link**, and **Document Link** allow you to design the visualization of the various kinds of links that can be included in guide pages.

  - **External Link Highlight**, **Application Link Highlight**, **Personal Info Links Highlight**, **Internal Link Highlight**, **Help Link Highlight**, and **Document Link Highlight** allow you to design the highlight of the various kinds of links when pointing to the link.

- Point to any CSS style definition ![icon] node to view a tooltip describing the purpose of the CSS style.

- The top menu cannot be designed via CSS style definitions. The visualization of the top menu is predefined by Alfabet BD GmbH.

- Although such aspects as font size and font color can be configured by means of the CSS style definitions, the font face cannot be explicitly configured for any aspects of the guide pages. The font face is specified in the **AlfaGUIScheme** and is used throughout the Alfabet interface in order to provide a consistent look-and-feel. The font face is configured by your solution designer in the **AlfaGUIScheme** available in the configuration tool Alfabet Expand.

- Point to each style listed below the **CSS Styles** node to view a tooltip describing the purpose of the style definition.

To change the style of your guide pages:

1) Expand the **CSS Styles** node to view all styles definition nodes available in the Guide Pages Designer.

2) Click the element that you want to design.

3) Above the attribute window section, click the **Switch to Categories** button. The attribute window displays the following sections:

    - **General Information**: This section cannot be edited. It displays general information about the change history of the style definition.

    - **Style Common**: This section cannot be edited. It displays the technical name of the style definition.

    - **Style Rules**: This section allows you to define the look of the guide page element. Expand relevant sub-sections of the grid as needed. The attributes that can be meaningfully defined will depend on the element you are designing.

4) Click the **Save** button to save the specification of the style definition.

Chapter 6:   Configuring a Top Menu for a Guide View or Guide Page

The guide view/guide page may include an additional configured toolbar at the top of the start page which may include menu buttons or menus with menu items that users can click to navigate to a functionality in Alfabet. The top menu that you configure will be displayed directly below the standard Alfabet toolbar. Unlike the content of a guide page's navigator menu, which may change depending on the link you click, the top menu will remain available in the standard Alfabet toolbar during the entire user session, even after the user has navigated away from the guide view/guide page. The top menu allows you to provide links to functionalities that a user might need to have easily accessible at all times, such as **Search**, **Bookmark Desktop**, **Workflows**, **Capture Applications**, or specific configured reports, etc. You can include any functionality, standard view, configured report or standard or configured object profile in the top menu configuration.

The top menu provides menu items that allow users to navigate to Alfabet functionalities. Each menu item consists of sub-items that are displayed as options in a menu that opens when users click the top-level menu item. The sub menu items can either link directly to an Alfabet functionality or provide a link to an external URL. Only one top menu can be configured per guide view/guide page. In other words, one top menu can be configured per user profile. The design of the top menu cannot be customized via style definitions.

ⓘ The top menu bar will not be displayed if the **Top Menu** is not defined for the guide page/guide view.

The **Top Menu** ⬚ node is displayed below every guide view/guide page node, but the top menu will not be visible in the Alfabet interface unless it is explicitly configured in the Guide Pages Designer.

⚠ When you use the **Copy** and **Paste** functionalities, the copied top menu will overwrite the top menu that you are copying to. If the top menu that you are copying to has any subordinate menu items, these too will be overwritten.

The following information is available:

- Creating and Sequencing Menu Items and Sub Menu Items

- Defining a Link to a Functionality

- Defining a Link to a Configured Report

- Defining a Link to a Standard or Configured Object View

- Defining a Link to a Standard Page View

- Defining an External Link for a Sub-Item

- Removing Menu Items and Sub-Items

Creating and Sequencing Menu Items and Sub Menu Items

You can define two levels of menu items. The top-level menu items are directly displayed in the menu bar and when clicked by the user, open as a drop-down menu with subordinate menu items that link to a functionality, standard view, configured report, or standard or configured object profile or guide view in Alfabet, or a link that targets an external URL.

To create menu items for the top menu:

1) Click the arrow ▼ for the **Top Menu** ▢ node and click **Add Item**. A new top-level menu item ▢ is added below the **Top Menu** ▢ node.

2) Enter a caption for the menu item in the **Text** field and a tooltip in the **Tooltip** field.

⚠ Please note that you should not use the ampersand character nor the HTML entity specification for the ampersand character as a substitute for the word "and" in the **Text** field for a top-level menu item.

3) Create all top-level menu items as described above.

4) Define the sequence of the top-level menu items in the menu bar: Click the **Top Menu** ▢ node and click the **Items** attribute in the attribute window to open the **Sort Entries** editor. Reorder the menu items using the up and down arrows and click **OK** to save your changes.

5) For each top-level menu item ▢ , click the arrow ▼ and select **Add Application Link Sub-Item** to add a link to an Alfabet functionality, configured report, object view, or page view, or select **Add External Link Sub-Item** to link to an external URL. The sub-item ▢ is added below the top-level menu item. For more detailed information about configuring the sub-items, see the sections:

- [Defining a Link to a Functionality](#)

- [Defining a Link to a Configured Report](#)

- [Defining a Link to a Standard or Configured Object View](#)

- [Defining a Link to a Standard Page View](#)

- [Defining an External Link for a Sub-Item](#)

6) Define the caption for the sub-item in the **Text** field and a tooltip in the **Tooltip** field.

⚠ Please note that you should not use the ampersand character nor the HTML entity specification for the ampersand character as a substitute for the word "and" in the Text field for a sub-item.

7) Once all sub-items have been created, define their sequence in the drop-down menu by clicking the top-level menu item ▢ node and clicking the **Sub-Items** attribute in the attribute window to open the **Sort Entries** editor. Reorder the sub-items using the up and down arrows and click **OK** to save your changes.

8) Click the **Save** button to save the top-level menu items and sub-items.

9) To design the visualization of the navigator menu, expand the **CSS Styles** 🖊 node and configure the following CSS styles, as needed:

- **Navigator**

- **Navigator Expand/Collapse Cell**

- **Navigator Item**

- **Navigator Item Highlight**

- **Selected Navigator Item**

- **Selected Navigator Item Highlight**

Please note that the CSS configuration applies to all navigator items. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

10) Click the **Save** button to save the style definitions.

Defining a Link to a Functionality

To configure a link to an Alfabet functionality

1) For each top-level menu item, click the arrow for the top-level menu item and select **Add Application Link Sub-Item**. The sub-item is added below the top-level menu item. Click the sub-item to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `BusinessFunction`. The attribute window is updated with attributes relevant for a functionality.

3) In the **Business Function** field, select the Alfabet functionality that you want to link to.

4) If the configurations listed below apply: In the **Application Link Arguments** field, specify arguments to define the link target. The syntax for this entry is *<Type of Argument>=<Value of Argument>* (for example: Explorer=COMG_Explorer). Please note the following:

- If you set a link to the **Simple Search** functionality and the search functionality should be limited to a set of object classes, specify the object class names in a comma-separated format with the argument *ContextArgs=<class names in comma-separated format>*. To specify an object class stereotype, specify the object class stereotype in the comma-separated list as: *<class name>:<stereotype name>*.

- If you set a link to the **Project Management** functionality, you can open the functionality with the filter preset to a defined project stereotype. You must specify the project stereotype with the entry *ContextArgs=<project stereotype name>*.

- If you set a link to an Alfabet functionality that includes sub-functionalities (typically explorers or graphic views), you must specify which sub-functionality should be accessed. To determine which functionalities have sub-functionalities, see the section *Business Functions and Their Sub-Functionalities* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*. To reference an explorer, specify *Explorer=<name of explorer>*. To reference a view, specify: *GraphicView=<name of graphic view>*.

5) Click the **Save** button to save the configuration of the sub-item.

6) To design the visualization of the application links in the navigator menu, configure the following CSS styles, as needed:

- **Navigator Application Link**

- **Navigator Application Link Highlight**

Please note that the CSS configuration applies to all application links including those targeting a functionality, object view, standard view, and configured report. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Defining a Link to a Configured Report

The configured report must first be created by your solution designer in the configuration tool Alfabet Expand. For more information, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

> A configured report embedded in or linked to in a guide view/guide page will be accessible via the user profile that the guide view/guide page is assigned to, regardless of the authorization defined for the configured report.

To configure a link to a configured report:

1) For each top-level menu item, click the arrow ▼ for the top-level menu item and select **Add Application Link Sub-Item**. The sub-item is added below the top-level menu item. Click the sub-item to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `Report`. The attribute window is updated with attributes relevant for a configured report.

3) If you set a link to a configured report defined to be applied to an object class, you can limit the results of the report to a specific object of this class. In the **Application Link Arguments** field, specify the `REFSTR` property of the corresponding object with the entry: *ContextArgs=<REFSTR of object>*.

> The `REFSTR` property is not displayed on the Alfabet user interface. You can read the `REFSTR` of objects from the Alfabet database using Alfabet query language or native SQL queries, or by directly searching in the Alfabet database with SQL-based queries.

4) If you set a link to a configured report with filters, you can define the filter settings for the configured report in the **Application Link Arguments** field. The configured report will open with the specified filter settings. The following syntax is used to specify the filter settings in the `ViewContextVals` application link argument:

```
ViewContextVals:@FilterFieldName=FilterFieldValue&&@FilterField2Name=Filt
erField2Value
```

Note the following about the definition of the filter field settings:

- The following data types can be specified in the `ViewContextVals` application link argument: `String, Boolean, Real, Integer, Reference, ReferenceArray`. The data types should be space-separated.

- The `ViewContextVals` application link argument must be appended to the end of the string specified in the **Application Link Arguments** field in the guide page/guide view and must follow the other defined arguments without any delimiter or whitespace. The filter field name and value

are delimited with = and if multiple filter fields are defined, the definitions are delimited with &&. If the filter field values contain either = or &, this character must be escaped with a backslash (\) (for example: `ViewcontextVals:@AppName=Credit\&Loans*`). Filter field names must start with an At sign <@>. Therefore, the filter field names and parameters in the underlying query must also start with an At sign <@>

- If both `ContextArgs` and `ViewContextVals` application link arguments are defined in the **Application Link Arguments** field, the `ViewContextVals` must be appended to the end of the string specified in the **Application Link Arguments** field and must follow the other defined arguments with no delimiter or whitespace.

- Filter field names must start with an At sign @. Therefore, the filter field names and parameters in the underlying query must also start with an At sign @ The Alfabet Query Builder defines parameters starting with `a  :` instead of an At sign @. You must change this manually using the text editor in the **Query as Text** attribute of the configured report or in the report assistant.

- The filter field name and value are delimited with the Equal sign = and if multiple filter fields are defined, the definitions are delimited with Ampersand signs &&. If your filter field values contain either the Equal sign = or the Ampersand sign &, this character must be escaped with a backslash (\) (for example: `ViewcontextVals:@AppName=Credit\&Loans*`).

5) Click the **Save** button to save the configuration of the sub-item.

6) To design the visualization of the application links in the navigator menu, configure the following CSS styles, as needed:

- **Navigator Application Link**

- **Navigator Application Link Highlight**

Please note that the CSS configuration applies to all application links including those targeting a functionality, object view, standard view, and configured report. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Defining a Link to a Standard or Configured Object View

Whether the link will open an object profile or guide view will depend on the configuration of the object view.

For more information, see the chapter *Configuring Object Views* in the reference manual *Configuring Alfabet with Alfabet Expand*.

1) For each top-level menu item, click the arrow for the top-level menu item and select **Add Application Link Sub-Item**. The sub-item is added below the top-level menu item. Click the sub-item to open its attribute window.

2) In the **Link Destination** field in the attribute window, select `ObjectView`. The attribute window is updated with attributes relevant for an object view.

3) In the **Object Profile** field, select the object view that you want to link to.

4) In the **Base Object** field, enter the value of the REFSTR property of the object for which the object view shall open.

> The REFSTR property is not displayed on the Alfabet user interface. You can read the REF-STR of objects from the Alfabet database using Alfabet query language or native SQL queries, or by directly searching in the Alfabet database with SQL-based queries.

5) Click the **Save** button to save the configuration of the sub-item.

6) To design the visualization of the application links in the navigator menu, configure the following CSS styles, as needed:

- **Navigator Application Link**

- **Navigator Application Link Highlight**

Please note that the CSS configuration applies to all application links including those targeting a functionality, object view, standard view, and configured report. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

7) Click the **Save** button to save the style definitions.

Defining a Link to a Standard Page View

Only page views associated with an explorer root node or functionality (Business Function) can be specified as a link for a sub-item. It is not possible to show results about a selected object and therefore you cannot link a page view implemented in an object view. For an overview of page views assigned to explorer root nodes, see *Page Views Assigned to Explorer Root Nodes* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.

1) For each top-level menu item, click the arrow ▼ for the top-level menu item 🗔 and select **Add Application Link Sub-Item**. The sub-item 🗔 is added below the top-level menu item. Click the sub-item 🗔 to open its attribute window.

2) In the **Link Destination** field in the attribute window, select GraphicView. The attribute window is updated with attributes relevant for a graphic view.

3) In the **Graphic View** field, select the graphic view that you want to link to.

4) Click the **Save** button to save the configuration of the sub-item.

5) To design the visualization of the application links in the navigator menu, configure the following CSS styles, as needed:

- **Navigator Application Link**

- **Navigator Application Link Highlight**

Please note that the CSS configuration applies to all application links including those targeting a functionality, object view, standard view, and configured report. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

6) Click the **Save** button to save the style definitions.

Defining an External Link for a Sub-Item

You can add an external link to the menu item. When the user clicks the link in the guide view/guide page, a new browser tab will open displaying the content of the URL.

To define a link to an external URL:

1) For each top-level menu item, click the arrow for the top-level menu item and select **Add External Link Sub-Item**. The sub-item is added below the top-level menu item. Click the sub-item to open its attribute window.

2) In the **External URL** field in the attribute window, specify the external URL that shall open in a new window when the user clicks the link in the menu.

   - You may specify a relative path for the external link. In this case, the string defined in the **External Link** attribute will be concatenated to the server URL. In order to specify a relative path for the external link, you must select the checkbox for the **Relative Path** attribute.

   - If you do not select the checkbox for the **Relative Path** attribute, you must specify the prefix `http` or `https` for the external link, otherwise an error will be displayed explaining that the URL is invalid.

   - Links to URLs defined for the guide pages must conform to current URL standards.

   - Links to URLs defined for the guide pages must exclusively consist of ASCII characters. If, for example, you want to link to a configured report designed in Alfabet Expand, the name of the report must not contain any non-ASCII characters.

3) Click the **Save** button to save the configuration of the sub-item.

4) To design the visualization of the external links, configure the CSS style **External Link**. Please note that the CSS configuration applies to all external links. For more information about working with the CSS style definitions provided available in the Guide Pages Designer, see the section Applying Style Definitions to Guide Pages.

5) Click the **Save** button to save the style definitions.

Removing Menu Items and Sub-Items

To remove a menu item or a sub-item, click the arrow for the menu item and select **Remove**.

Chapter 7:   Configuring a Global Search Field for a Guide View or Guide Page

A global search field can be configured to be displayed in the standard Alfabet toolbar of the user interface. The global search field allows the user to search for objects in the Alfabet database. The availability of the search field is part of the guide view/guide page configuration and relies on a configured report to search for objects. The configured report must be configured in the configuration tool Alfabet Expand. The configured report should be designed to display a simple table with search results that are found based on a query. The query must contain a condition with a parameter definition.

When the user enters a string in the global search field and clicks the **Search** icon, the configured report will open in the main viewing area of the guide view/guide page. Once the first three letters of a search string have been entered in the global search field, the auto-fill function will invoke a search and start displaying a list of the first thirteen objects found by the query. The list of matching objects will be updated with each additional letter typed in to the search field. The search string that the user has entered will substitute the parameter in the configured query and the results found by the query will be displayed in the table in the configured report.

The search field will remain available in the standard Alfabet toolbar during the entire user session, even after the user has navigated away from the guide view/guide page. Only one search field can be configured per guide view/guide page. In other words, one search field can be configured per user profile.

The **Search Field** node is displayed below every guide view/guide page node, but the search field will not be visible in the Alfabet interface unless it is explicitly activated in the Guide Pages Designer. Please note that the search field is not displayed in the preview area of the Guide Pages Designer. The search functionality should be tested in the context of the configured report in the configuration tool Alfabet Expand.

Please note that the creation of a configured report is not explained in detail here. Only information relevant to the configuration of the report for the purposes of the search field is described below. For detailed information about the definition of configured reports, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Please note the configured report that you implement for the search field functionality must fulfill the following criteria:

- The report must be of the type `Query` or `NativeSQL`. See specifically the sections *Creating a Tabular Configured Report of the Type Query* and *Creating a Tabular Configured Report of the Type NativeSQL* in the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- The report must return a simple data set. Expandable report tables cannot be used for the search functionality.

- The report must not use filter definitions stored in `UserGlobalData`.

- The report must contain at least one `WHERE` condition defined with a parameter for the filter definition. The parameter must be written in the query with the parameter prefix @. The search field in the guide view/guide page serves as a filter field based on the parameter. Please note the following:

  - If you define only one parameter, you can either define a filter panel to allow the user to alter the search condition after the report has opened or you can define a report without a filter panel. If no filter panel is specified in the configured report, the report will be executed with the search criteria entered by the user in the search field and the user cannot alter the search criteria from within the configured report. The user must enter the new search criteria directly in the search field in the standard Alfabet toolbar.

- If the configured report has more than one parameter definition in the `WHERE` condition, a filter panel must be added to the configured report with one filter field per parameter. The value that the user enters in the search field will automatically fill the respective filter field. The user can enter search criteria in the other filter fields in the configured report. The filter settings are stored in the user context settings and the next time the user opens the configured report all filter settings will be automatically defined with the filter settings from the previous user context. The user can change this, as needed.

- Unlike the filter fields in the filter panel of configured reports, the search field associated with the guide view/guide page is not configurable. As a result, users may only enter a string as search criteria. Therefore, if users should search for objects via properties that are not of the type `String` or `Text`, you should provide the user with a tooltip explaining how they should enter the search criteria. For example, if the property value they are searching for is of the type `Date`, the date must be entered in the format appropriate to the user's current culture. If the property value they are searching for is based on an enumeration, the permissible values for the enumeration should be described in the tooltip.

To configure the global search field:

1) In the configuration tool Alfabet Expand, define the configured report that shall open when the user clicks the button **Search** in the search functionality of the guide view/guide page. Please ensure that the criteria explained in the note above is fulfilled by the configured report.

> ⓘ For general information about creating configured reports, see the sections *Creating a Tabular Configured Report of the Type Query* and *Creating a Tabular Configured Report of the Type NativeSQL* in the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

2) In the explorer of the Guide Pages Designer, click the **Search Field** 🔍 node for the guide view/guide page that you want to add a search field for.

3) In the attribute window, edit the following fields:

- **Report**: Select the configured report designed for the global search field functionality. All reports that have been configured in Alfabet Expand will be displayed.

- **Application Link Arguments**: Enter the parameter in the query specified in the configured report that the search criteria will substitute when the query is executed. Please note that the parameter must be written in the query with the parameter prefix @.

- **Text**: Enter a caption for the search field. The caption is displayed next to the global search field located in the standard Alfabet toolbar.

- **Tooltip**: Enter the tooltip to display when the user points to the global search field.

- **Autocomplete**: Select `True` if the autocomplete functionality should be available for the global search field. In this case, object names and their respective icons will be displayed in a drop-down box directly under the field making it fast and easy to identify what's being looked for. Select `False` if the autocomplete functionality should not be available.

- **Autocomplete Drop-Down Columns**: If the **Autocomplete** is set to `True`, a comma-separated list of the column numbers in the dataset resulting from the associated configured report to be shown in the search field. The column number 0 is the first column visible in the report sequenced from left to right. For Arabic, this will be sequenced from right to left. Once the first three letters of a search string have been entered in the global search field, the auto-fill function will invoke a

search and start displaying a list of the first thirteen objects found by the query. The list of matching objects will be updated with each additional letter typed in to the search field.

- **Visible** : Select `True` to display the global search field on the Alfabet user interface. Please note that the global search field will not be displayed in the preview window of the Guide Pages Designer.

4) Click the **Save** button to save the search field definition.

Chapter 8: Reviewing or Implementing the Guide Page Project in the Alfabet Solution

Regardless of whether you simply want to review the design and behavior of a guide page or whether you want to make the guide pages available to the user community, the procedure is similar. You must carry out the following steps:

- **Save the guide pages to the Alfabet database** to implement them in the Alfabet solution.

- **Assign the guide pages to the relevant user profiles** in the configuration tool Alfabet Expand.

- **Translate the strings displayed in your guide pages** to provide localized versions for the user community.

- **Upload the guide pages to the production environment** if they have been configured in your test or design environment.

The following information is available:

- Setting the Guide Page Project as Current

- Assigning Guide Pages or Guide Views to an Alfabet User Profile

- Creating a New Language Version

- Uploading the Guide Views/Guide Pages to the Production Environment

Setting the Guide Page Project as Current

Only one guide page project can be submitted to the Alfabet database and implemented in the Alfabet solution. When a guide page project is saved and implemented in the Alfabet solution, the guide pages already implemented in the Alfabet solution will be overwritten.

If you save the guide page project to the Alfabet solution while users are currently logged in to Alfabet, the changes will apply only after the next re-login of the user to the Alfabet user interface.

1) After you have finished the configuration and design of your guide pages, you must save the guide page project to the Alfabet database. To do so, click the **Save** button to save the configuration.

2) Click the **Update Guide Pages** button.

3) Click the **Save** button again.

4) Ensure that the guide page that you want to review is assigned to a user profile. This is explained in more detail in the section Assigning Guide Pages or Guide Views to an Alfabet User Profile.

5) Restart the Web application.

6) Open the Alfabet interface and review the relevant guide page.

Assigning Guide Pages or Guide Views to an Alfabet User Profile

After you have set the guide page project as the current project, you must assign the guide page or guide views to a user profile to make them available to the user community. Please note the following:

- If you are implementing a guide page for a user profile, then you must specify the guide page as the start page in the **Guide Page** attribute of the user profile.

- If you implement a guide view as the start page for a user profile, then you must specify the guide view in the **Guide Page** attribute of the user profile. Because guide views may have links that target other guide views, you must explicitly define access permission to all guide views that may be accessed by the user profile. All other guide views that are targeted by links in the start page or other permissible guide views must be specified in the **Allowed Guide Views** attribute for the user profile. If a user attempts to navigate to a guide view that he/she does not have access permission to, an informational message will be displayed.

- The user profile definition can be carried out either in the configuration tool Alfabet Expand or the **User Profiles Administration** functionality that can be accessed in the Alfabet user interface via the `Admin` user profile. For more information about configuring access permissions for a user profile, see either the section *Configuring User Profiles for the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*, or the chapter *Defining and Managing User Profiles* in the reference manual *User and Solution Administration*.

- If a guide page or guide view is added or modified, users currently logged in to Alfabet must re-login to Alfabet to view the changes.

Creating a New Language Version

It is recommended that the content in the guide views/guide pages is written in English.. The strings can be translated to any secondary language currently supported by Alfabet. Translation is carried out in the configuration tool Alfabet Expand.

> ⚠️ Please note that the strings specified for guide pages will be extracted to the `GUIDEPAGES` vocabulary and the strings specified for guide views will be extracted to the `METAMODEL` vocabulary.
>
> Custom strings for guide pages and guide views must be captured in English, regardless of the primary culture definition. All strings for captions for configuration objects and guide page/guide view content will be displayed in the `Original` column in the **Translation Editor** or XLSX files of the relevant vocabulary.

The Alfabet interface is available in the following languages:

Language	Locale ID
Arabic (Saudi Arabia)	1025
German (Germany)	1031
English (United States)	1033
French (France)	1036

Language	Locale ID
Portuguese (Brazil)	1046
Polish (Poland)	1045

After uploading the guide page project to the Alfabet database, all text in the guide pages/guide views will be added to the relevant vocabulary and can be translated. You can translate the content of the guide page project using the **Translation Editor** available in the configuration tool Alfabet Expand or in exported Microsoft Excel files that can be translated and reimported to Alfabet.

> (i) For more information about the translation of Alfabet vocabularies, see the section *Modifying, Translating and Managing the Vocabularies* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To create a new language version of your guide pages/guide views:

- In the Guide Pages Designer, upload the original into the Alfabet database. For more information, see Setting the Guide Page Project as Current.

- In the configuration tool Alfabet Expand, use the **Translation Editor** functionality to create a translation of your uploaded guide page project.

If a language version of your guide pages is not required any longer and you would like to delete it completely from the Alfabet database, carry out the following steps in the configuration tool Alfabet Expand:

- Export the vocabulary of all other language versions to either a Microsoft® Excel® or a VOC file.

- In the menu of Alfabet Expand, select **Globalization** > **Delete Guide Pages Translation**. The translation table **Guide Pages** is removed from the translation editor for all language versions.

- Close Alfabet Expand and open the Guide Pages Designer.

- In the Guide Pages Designer, open the Alfabet database and reload the original guide pages to the Alfabet database. For more information, see Setting the Guide Page Project as Current.

- Close the Guide Pages Designer and open the configuration tool Alfabet Expand.

- Open the translation editor. You will see that the translation table **Guide Pages** is empty for all language versions. To restore the vocabulary for the language versions that you have stored in a VOC or Microsoft® Excel file, you must open the respective vocabulary in the **Vocabulary Manager** and import the vocabulary from the VOC or Excel file.

Uploading the Guide Views/Guide Pages to the Production Environment

If you have configured the guide views and guide pages in a test or design environment, you will need to upload them to the production environment. To do so, go to the Alfabet Expand classic and click **Meta-Model** > **Create Configuration Meta-Model Update File**. Go to the **Guide Pages** tab. All guide views and guide pages saved to Alfabet database are displayed. Select the guide views/guide pages that you want to migrate to the target database. Optionally, you can select the **Remove All Guide Pages from Target Database Before**

Updating checkbox to overwrite the complete guide page configuration in the target database with the guide pages in the AMM file.

⚠️   If no guide views or guide pages are selected, then all guide views and guide pages in the AMM file will be added to the target database, thus overwriting any existing guide views and guide pages with the same name.

The AMM file with the guide pages can be updated to the production environment via **Meta-Model** > **Update Meta-Model**.

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