



Horizon Enterprise Content Manager (HECM)

User Interface Styles & Standards Guide

Baselined/Approved

Version 3.05

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1.0. General Information

1.1. Preface

1.1.1. Reference and Function

For tracking and recordkeeping purposes, this document has been assigned the following reference code: **BID125628**.

This document is designed to support, drive and streamline user interface (UI) design and front-end development operations in an open, transparent and readily available fashion. The UI team heartily encourages constructive feedback, recognizing that communication is a prerequisite to consensus-building, mutual understanding and the overall cohesion and effectiveness of the group.

1.1.2. Authority and Rationale

The guidelines herein are not merely recommendations; they are standards. Follow these standards in all cases, without deviation, embellishment, second-guessing or selective application. Only rarely and under specific circumstances are exceptions allowed, and then only with the express consent of UI specialists. In the absence of further clarification from authorized personnel regarding UI issues, this document is the [final authority](#) on these matters. This authority is derived directly from management.

Standards serve a vital purpose in maintaining consistency. Since learning curves are inherent to all software use, consistent UI principles condition users to expect certain predictable patterns in both presentation and functionality. Similar instructions, for example, worded in similar ways, *should* appear in the same font face, color and size in similar screen locales under similar circumstances. Furthermore, with consistency, the company's image and brand are perceived as a coherent whole. This in turn conveys stability and assures the client that their trust in the company's products is not misplaced. It fosters loyalty and cultivates an emotional bond with the brand. In short, consistently applied standards make for a better product and user experience.

1.1.3. Evolution and Availability

This is an evolving document. With refinement and improvement, McKesson products adhering to its tenets will continually mature. The prime objective in this endeavor is, of course, to produce the best quality software on the market. The fluid nature of software development necessitates that these guidelines variably act and react to new conditions. Therefore, try to consult this document on a regular basis to remain up to date on revisions, additions and clarifications. Everyone affected by changes in this document must remain current on all standards.

This guide as a single Word-formatted document is available through StarTeam as [HECM UI Standards.doc](#) (see below for full path).

- **Location:** StarTeam: eig\HECM\doc\ProductMgt\User Interface\R1.0\UI Guidelines\HECM UI Standards.doc
- **Hyperlink:**
starteam://starteamapp.mckesson.com:49260/158;ns=Project;scheme=id/580;ns=View;scheme=id/5309754;ns=File;scheme=id;scope=full

1.2. Background

1.2.1. Scope

Many roles attached to the project benefit from its existence. This document attempts to present standards in a straight-forward manner, with background, when possible, on the rationale and reflection behind those decisions. The reason for this is three-fold.

- First, **transparency**. It demonstrates that decisions adhere to sound principles (UI best practices) and are **NOT** arrived at arbitrarily. This in turn instills greater accountability, accuracy and confidence through team-wide checks and balances.
- Second, **erudition**. It elucidates the decision-making path, such that the underlying logic becomes second-nature and propagates through the team. This guide is **NOT** meant to be all-inclusive. It assumes that the reader is capable of extrapolating the reasoning beneath the guidelines, so that patterns can be discerned and similar solutions applied under like circumstances.
- Third, **efficiency**. It streamlines development by reducing churn. By consensus-building through stakeholder buy-in early in the design process, standards can be established and locked down sooner. As a result, the rework rate plummets dramatically and the product moves more rapidly from idea to implementation.

1.2.2. Authors

All style guide changes funnel through the User Interface team to keep the quantity and quality of changes at a manageable level. This ensures consistency and helps eliminate the dissemination of contradictory or otherwise faulty information. Please thoroughly consult this guide before you contact UI with inquiries. The following are user interface designers in McKesson's Alpharetta, Georgia facility:

1.2.2.1. Christine Walker (*Christine.Walker@McKesson.com*) – (404) 338-3575

1.2.2.2. Nick Zedlar (*Nick.Zedlar@McKesson.com*) – (404) 338-4311

1.2.2.3. Bob Owen (*Bob.Owen@McKesson.com*) – (404) 338-2049

1.2.3. Frequently Asked Questions

1.2.3.1. Horizon Enterprise Content Manager

🔗 **What is HECM?**

HECM is short for **Horizon Enterprise Content Manager**. Formerly known by its internal codename, ENIGMA, it is McKesson's next generation content and workflow management computer program. It follows in the footsteps of the company's successful software solution widely used throughout the medical sector, **Horizon Patient Folder (HPF)**.

🔗 **What are the general features of HECM?**

HECM is meant to be a generic (domain-independent) document-imaging content manager with basic core services such as COLD document-imaging, native content viewer, version control, and workflow and work list task management.

1.2.3.2. Updates and Maintenance

🔗 **What constitutes an update?**

An update is considered brand new content or a significant change in meaning or way of presenting something (for example, adding screen captures). Minor formatting, wording or spelling corrections are **NOT** marked as updates.

🔗 **How do I know what's been updated?**

It's easy. Check the Table of Contents (TOC) to see at a glance what sections have been updated since the previous version; they are marked with the ★ symbol. Parent headings are not update-marked unless every child section under it has been updated. In this case, the parent and all children are shown as updated.

1.2.3.3. Submitting Feedback

🔗 What types of things are appropriate to communicate to the UI team?

Virtually anything that pertains to the form and function of the application user interface *on the front end* and this Guide that documents them. Welcome are praise or constructive criticism of spelling, word choice, control types, colors, fonts, images, layout—anything you can think of that would make the product itself or the User Guide better and easier to use.

🔗 Who do I contact regarding the Style Guide?

See [Authors](#) above.

1.2.3.4. Using the Guide

🔗 This is a big document. How do I find what I'm looking for, get there fast and get out?

Your best bet is the Table of Contents. Navigate via the first- (chapter), second- (section) or third-level (subsection) heading in the TOC to jump to a topical part of this document.

🔗 What are the hyperlinks in this document for?

In almost all cases, these are bookmark links that jump within the Style Guide itself, usually to provide more information about a particular related or relevant topic. Occasionally, links to external content can be found, which always explicitly spells out the URL.

🔗 What if I don't know what a particular acronym stands for?

Check the [Acronyms](#) section of the [Glossary](#) (if it's not there, search the document for it). Usually there are multiple instances of the acronym spelled out and sprinkled throughout the Guide.

🔗 In the event of conflicting information, which takes precedence: the Guide or the UI specification document/BID?

The Guide catalogs generally applicable, predominant system-wide behaviors, properties and appearances. UI specs/BIDs, on the other hand, document exceptions and describe specific details that markedly differ from Guide specifications. BID descriptions trump those of the Guide.

1.2.3.5. *Baselining the Guide*

🔍 **If this is a “living document” that changes fairly often, how can anyone ever keep up to date?**

The answer is baselining. Sections of the Guide get “locked” after an intensive stakeholder group review process. This ensures that those sections receive the official “stamp of approval” and should, theoretically, experience relatively few changes afterwards. As section after section is baselined, the Guide as a whole becomes a more stable and orderly reference document.

🔍 **How does one know by looking at the Guide what has or hasn’t been baselined?**

Just as updated material is denoted by the ★ icon, recognize baselined material by the 🗝️ symbol attached to the applicable first-, second- or third-level heading. The symbol automatically appears in the Table of Contents, so approved or “locked” material is easy to spot at a glance. The 📄 icon shows line items that require baseline review. **The entire Guide is currently under baseline review, except those sections marked with a 🚫 icon.**

1.2.3.6. *Deferred Features*

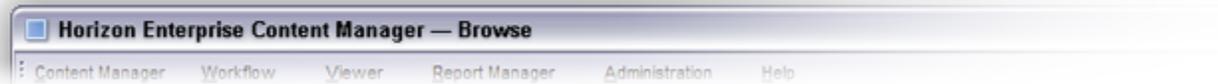
🔍 **How does one tell if certain features described in this document pertain to Release 1 or a later release?**

In addition to features approved for Release 1 use, the Guide documents proposed features deferred to later versions of the software. Any such functionality slated for future inclusion/examination occurs in the [Deferred Items](#) section.

2.0. Development Specifications

2.1. Main Application Window

2.1.1. Title Bar



↑ Figure 1: Browse Titlebar Example

The main HECM window features the left-aligned application icon and the title “Horizon Enterprise Content Manager.” It also indicates the current [tab](#) selection in the following form: <Application Icon> + <Application Name> + <Em Dash (Unicode 2014)> + <Tab Name>. Text in the title bar is also contingent upon the user’s role, since the title reflects the active tab. If a tab does not, for some reason apply, the title bar reverts to its default state, as described in the first sentence above. While the title bar shows to only the tab level, the [BCT](#) shows the entire path to a specific folder, when dealing with content.

Buttons in the title bar are Minimize, Restore/Maximize and Close; Help only occurs in [dialog boxes](#).

Present in Title Bar
(Minimize, Restore or Maximize and Close)



Absent from Title Bar
(Help)



2.1.2. Window Properties

2.1.2.1. Window Dimensions

The HECM window at launch is always maximized (full screen). All panes assume their [default allocations](#). The HECM application’s *minimum resizable dimensions* are **640 pixels x 480** pixels, principally to avoid odd rendering behavior in too-small window dimensions. The program is designed for display resolutions of **1024 pixels x 768** pixels and higher.

2.1.2.2. Color Scheme

As of the time of this writing, no official (custom) color themes exist. Standard .NET controls, which comprise the interface, inherit their look and feel from Microsoft Windows (in other words, themes are user-configurable at the operating system level, and the HECM application inherits those settings). Besides a considerable number of “Windows Classic” styles, XP ships with three “Windows XP” styles: Default (blue), Olive Green and Silver. The following table describes which HECM elements inherit settings from what system color member.

 Review the following on a line item-by-line item basis, not by section.

Name	Description / Purpose	Linked HECM Object(s)	Status
ActiveBorder	active window border color		
ActiveCaption	active window title bar background color		
ActiveCaptionText	active window title bar text color		
AppWorkspace	application workspace color		
ButtonFace	3-D element face color		
ButtonHighlight	3-D element highlight color		
ButtonShadow	3-D element shadow color		
Control	3-D element face color		
ControlDark	3-D element shadow color		
ControlDarkDark	3-D element dark shadow color		
ControlLight	3-D element light color		

ControlLightLight	3-D element highlight color		
ControlText	3-D element text color		
Desktop	desktop color		
GradientActiveCaption	active window title bar lightest gradient color		
GradientInactiveCaption	inactive window title bar lightest gradient color		
GrayText	dimmed text color		
Highlight	selected item background color		
HighlightText	selected item text color		
HotTrack	hot-tracked item color		
InactiveBorder	inactive window border color		
InactiveCaption	inactive window title bar background color		
InactiveCaptionText	inactive window title bar text color		
Info	tooltip background color		
InfoText	tooltip text color		
Menu	menu background color		
MenuBar	menu bar background color		
MenuHighlight	flat menu item highlight color		
MenuText	menu text color		
ScrollBar	scroll bar background color		
Window	window client area background color		
WindowFrame	window frame color		
WindowText	window client area text		

Source: MSDN ([http://msdn2.microsoft.com/en-us/library/system.drawing.systemcolors_members\(VS.80\).aspx](http://msdn2.microsoft.com/en-us/library/system.drawing.systemcolors_members(VS.80).aspx)).

2.1.2.3. Status Bar

The main application *does* have a status bar (unlike dialog boxes). However, it does **NOT** have any text in it.

2.1.3. Resizing Behavior

The resizing behavior described here is intended to minimize implementation time for Release 1. Expect this behavior to change in future versions, so that users with higher-resolution displays will get greater value from resizing the application.

2.1.3.1. Toolbar

When the user resizes the width of the display, anchor the buttons on the tool bar to the left-hand side of the application window. When the width of the line of tool bar buttons exceeds the width of the display, hide the tool bar buttons that extend beyond the width of the display on the right side. Restore these buttons when the user expands the application window wide enough to include the previous hidden buttons.

2.1.3.2. Left Side Pane (LSP)

When the user resizes the height of the HECM application window to obscure [LSP](#) options and controls, display a vertical scroll bar anchored to the right side of the [LSP](#) to allow the user to scroll through the options.

When the user resizes the width of the HECM application window, leave the vertical pane separator at the same distance from the left side of the application window as before the resize. That is, when the user makes the width of the application window smaller, the [LSP](#) should remain the same width and the [MCP](#) and [ODP](#) areas should be smaller. When the user makes the width of the application window larger, the [LSP](#) should remain the same size and the width of the [MCP](#) and [ODP](#) should be larger.

2.1.3.3. Object Details Pane (ODP)

When the user resizes the height of the HECM application window, leave the horizontal pane separator at the same distance from the bottom side of the application window as before the resize. That is, when the user makes the height of the application window smaller, the ODP should remain the same height and the [MCP](#) area should be smaller. When the user makes the height of the application window larger, the ODP should remain the same size and the height of the [MCP](#) should be larger.

In the ODP, display the application buttons anchored to the lower, right-hand corner of the application window, offset as described in this document. If the user resizes the ODP to obscure any of the other controls, display vertical and horizontal scroll bars to allow full access to the controls. Do **NOT** allow the buttons to obscure other controls in the pane.

2.1.3.4. Main Content Pane (MCP)

In the [MCP](#), display the application buttons anchored to the lower, right hand corner of the application pane, offset as described in this guide. If the user resizes the [MCP](#) such that any of the other controls are obscured, display vertical and horizontal scroll bars to allow full access to the controls. Do **NOT** allow the buttons to obscure other controls in the pane.

2.1.4. Cascading Menu

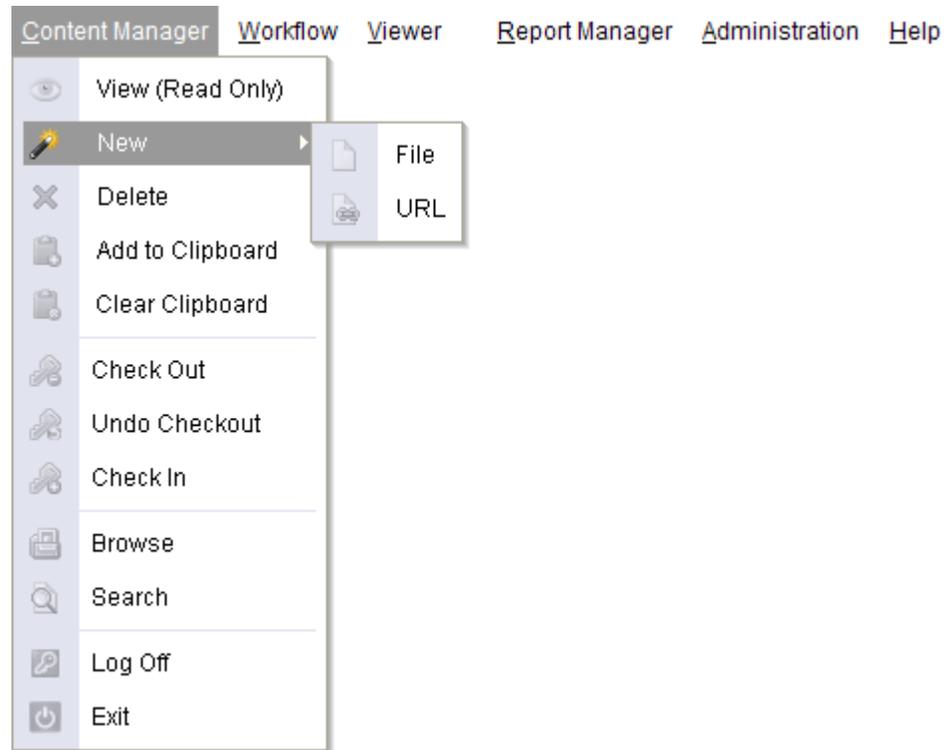
At the top of the main window interface (**NOT** in dialog boxes), a persistent cascading menu allows the user to drill down to specific operations. There are six (6) primary menus as follows:



↑ Figure 2: Main Menu Bar

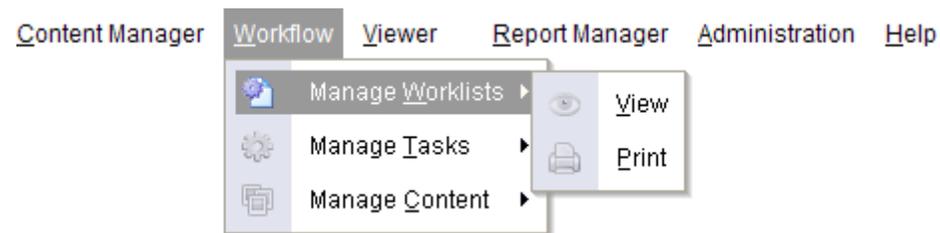
Note: all selections in the following examples are shown in their *enabled states*. Some selections are mutually exclusive and/or module-dependent, so will never appear exactly as shown. Also, they are presented in the order they appear in the interface from left to right, not alphabetically.

2.1.4.1. Content Manager

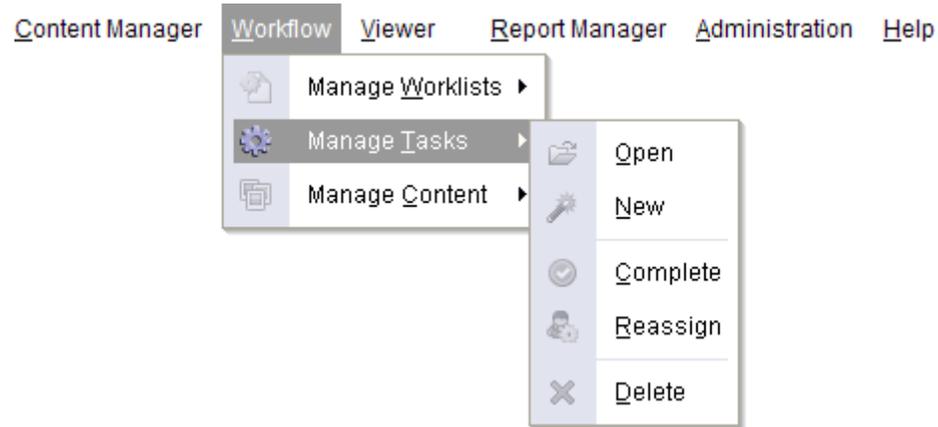


↑ Figure 3: Main Cascading Menu (Content Manager Menu)

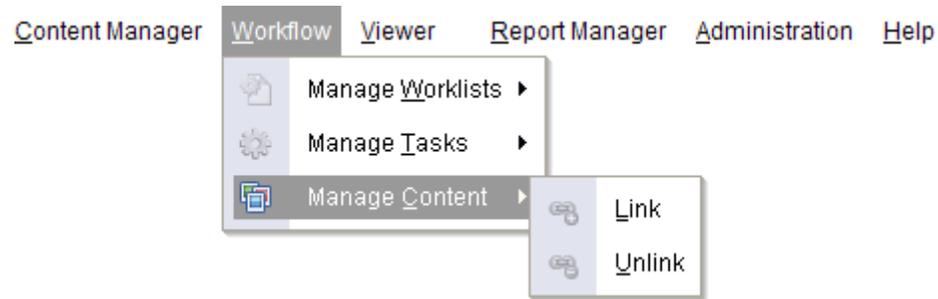
2.1.4.2. Workflow



↑ Figure 4: Main Cascading Menu (Workflow > Manage Worklists Menu)

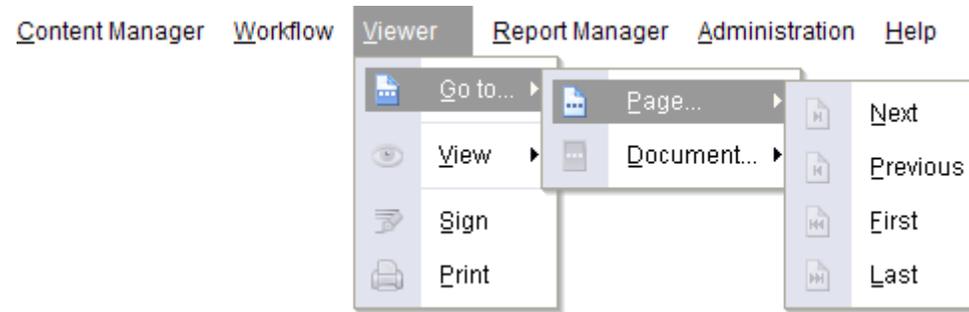


↑ Figure 5: Main Cascading Menu (Workflow > Manage Tasks Menu)

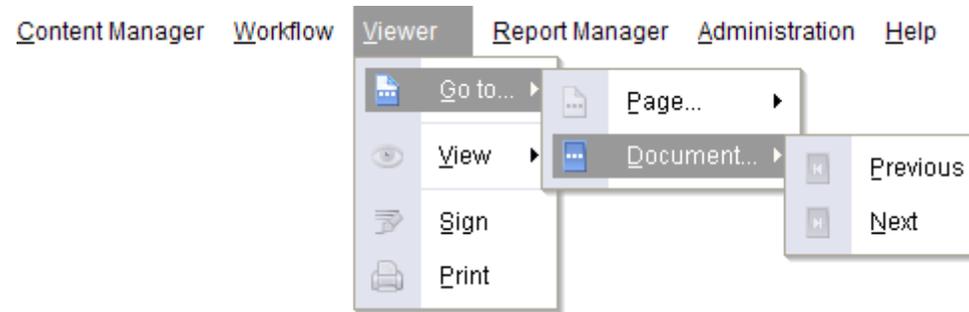


↑ Figure 6: Main Cascading Menu (Workflow > Manage Content Menu)

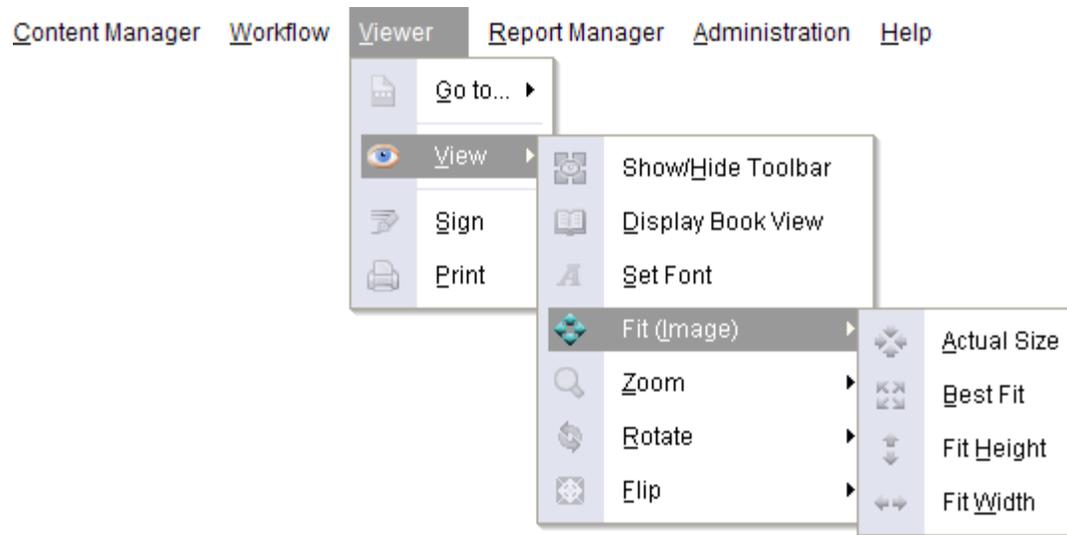
2.1.4.3. Viewer



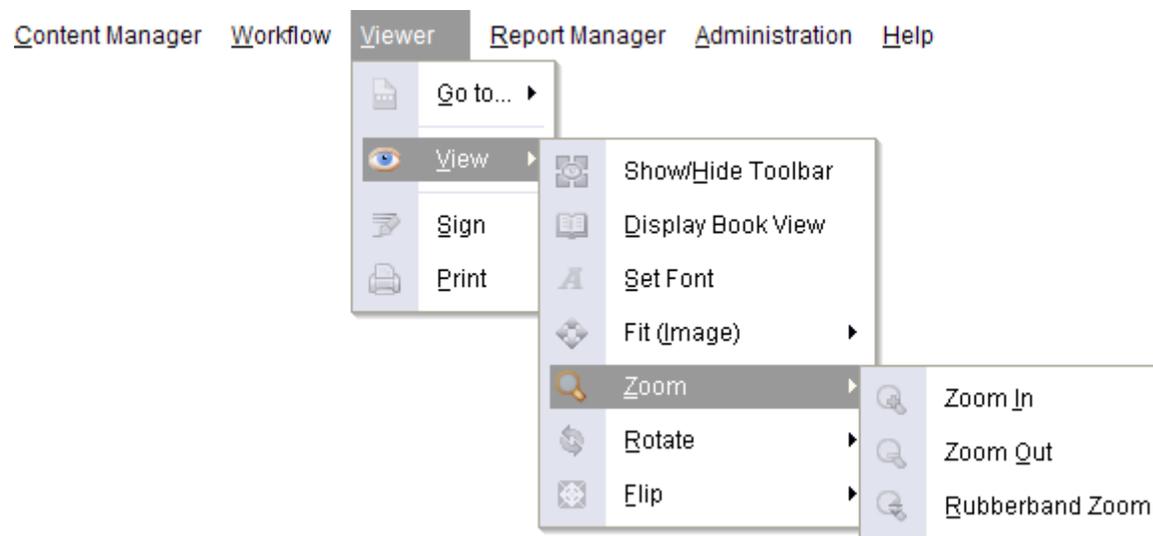
↑ Figure 7: Main Cascading Menu (Viewer > Go to... > Page... Menu)



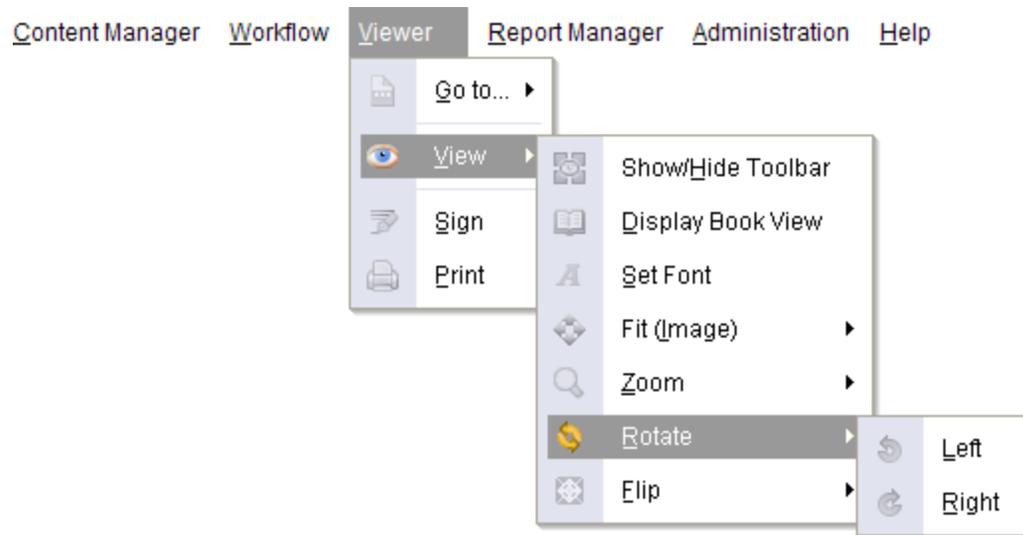
↑ Figure 8: Main Cascading Menu (Viewer > Go to... > Document... Menu)



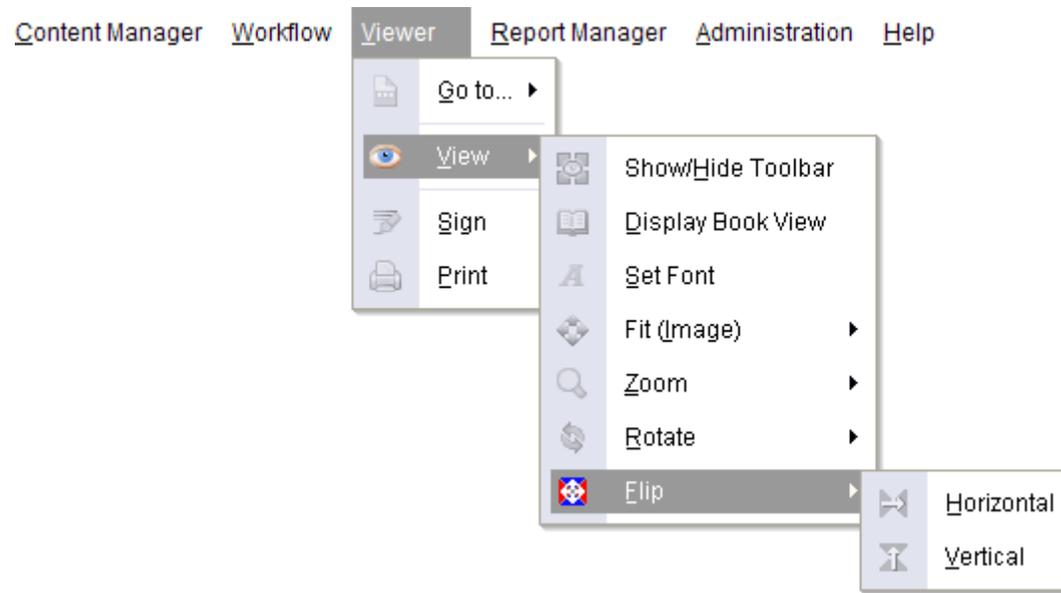
↑ Figure 9: Main Cascading Menu (Viewer > View > Fit Menu)



↑ Figure 10: Main Cascading Menu (Viewer > View > Zoom Menu)

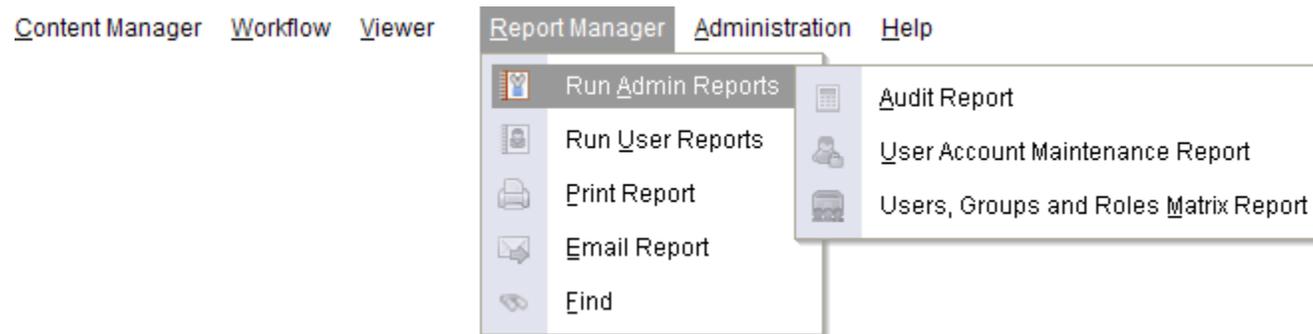


↑ Figure 11: Main Cascading Menu (Viewer > View > Rotate Menu)

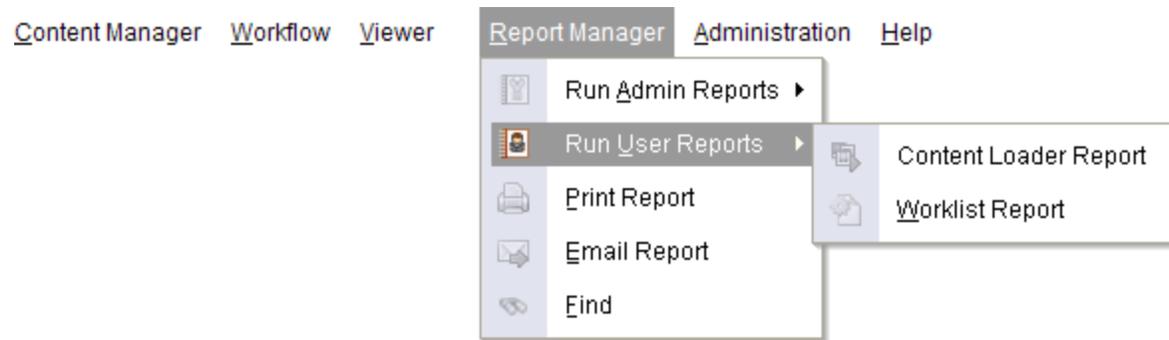


↑ Figure 12: Main Cascading Menu (Viewer > View > Flip Menu)

2.1.4.4. Report Manager

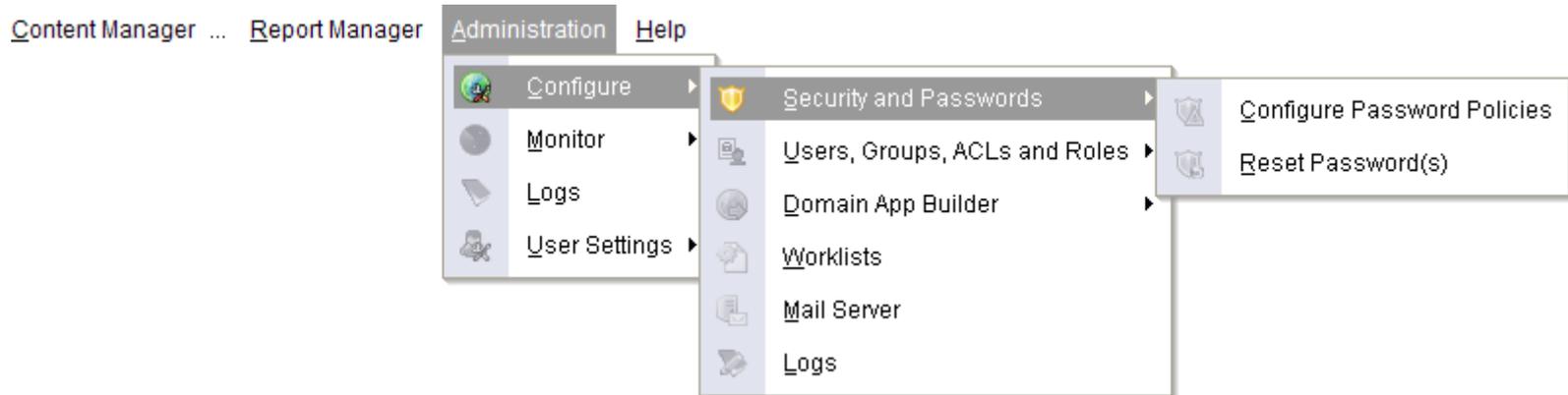


↑ Figure 13: Main Cascading Menu (Report Manager > Run Admin Report Menu)

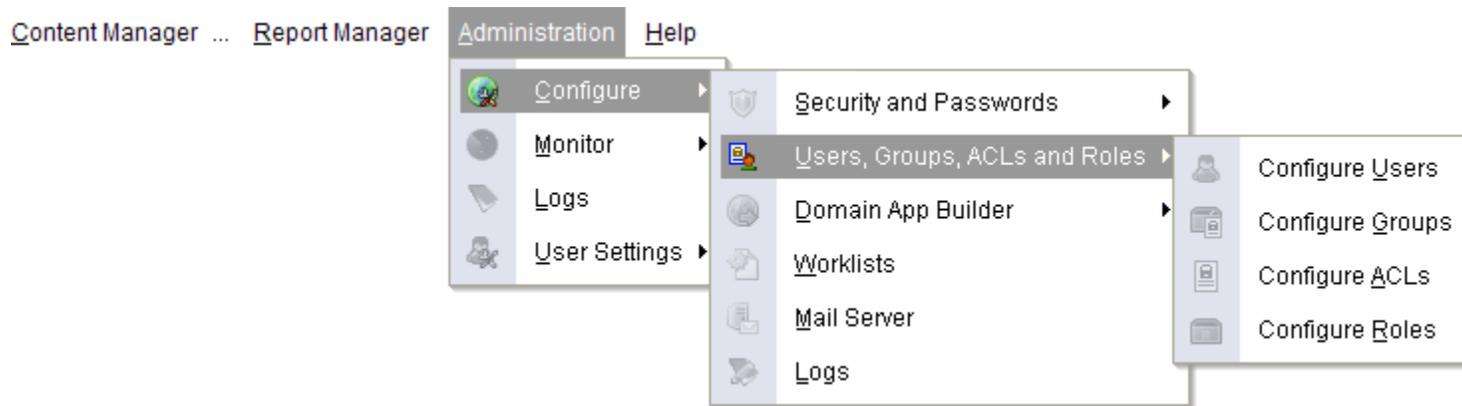


↑ Figure 14: Main Cascading Menu (Report Manager > Run User Report Menu)

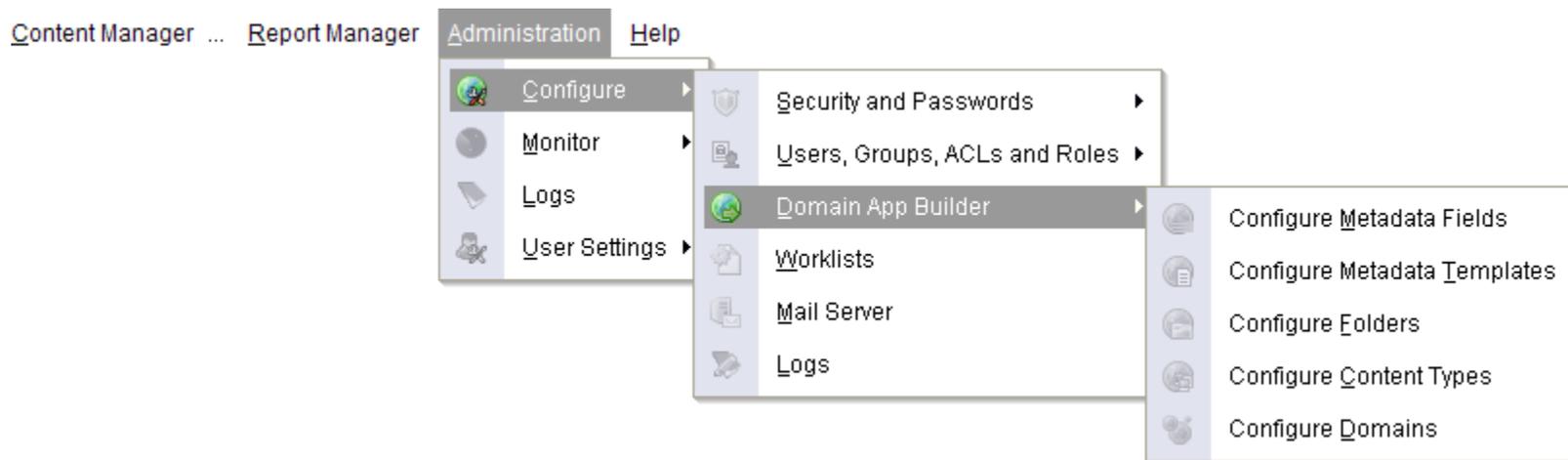
2.1.4.5. Administration



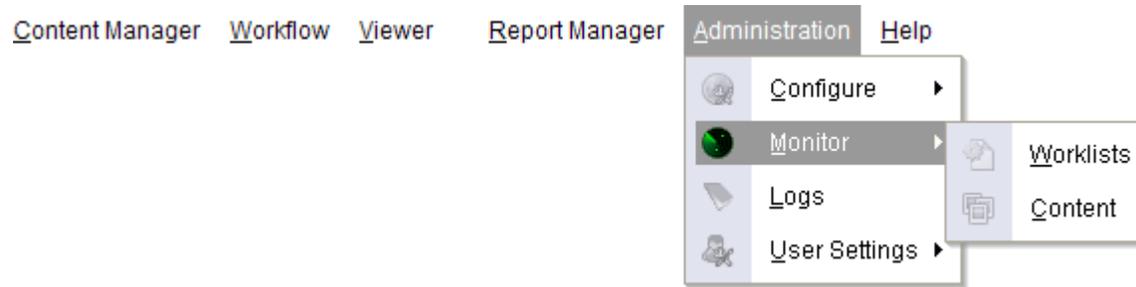
↑ Figure 15: Main Cascading Menu (Admin > Configure > Security and Passwords Menu)



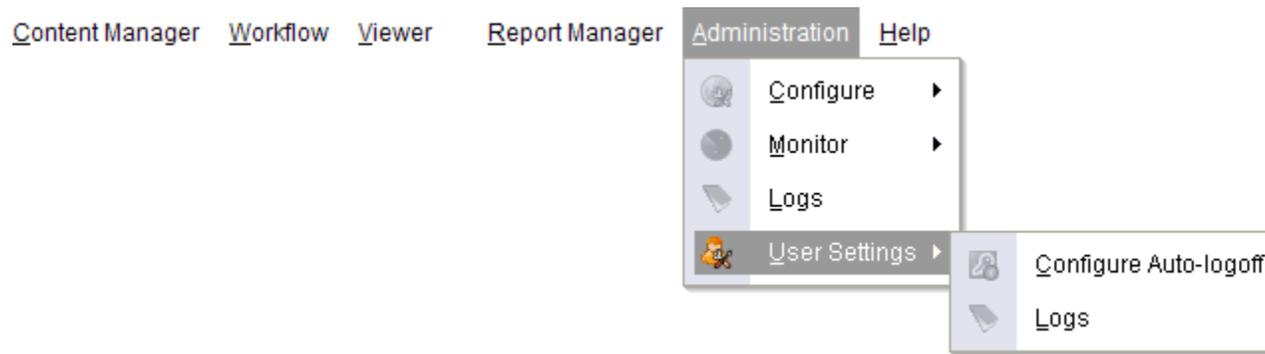
↑ Figure 16: Main Cascading Menu (Admin > Configure > Users, Groups, ACLs and Roles Menu)



↑ Figure 17: Main Cascading Menu (Admin > Configure > Domain App Builder Menu)



↑ Figure 18: Main Cascading Menu (Admin > Monitor Menu)



↑ Figure 19: Main Cascading Menu (Admin > User Settings Menu)

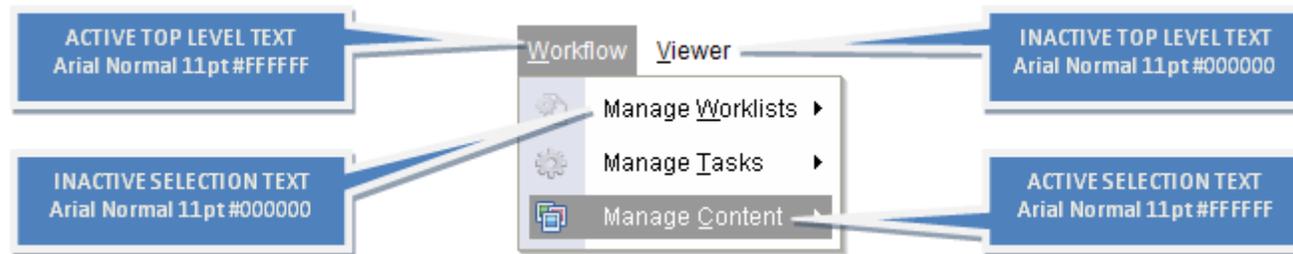
2.1.4.6. Help



↑ Figure 20: Main Cascading Menu (Help Menu)

For details on the Help icon on the far right of the menu bar, refer to [Help](#).

2.1.4.7. Font Attributes



↑ Figure 21: Cascading Menu Font Attributes

2.1.5. Button Bar/Toolbar ★

The button bar occurs only in the main application menu, **NOT** in dialog boxes. Detailed button bar documentation occurs in individual User Interface Specification documents, while the images and a description of their properties occur in this document in the [Button Bar/Toolbar Icons](#) section.

2.1.5.1. Drop Zone 🚫

Information pending.

2.1.5.2. Content Bin 🚫

Information pending.

2.1.6. Breadcrumb Trail (BCT) 🗺️

The breadcrumb trail (BCT) originates above the [Main Content Pane \(MCP\)](#), just to the right of the tabs. It is left-aligned. The BCT’s behavior and presentation depend upon where the user is in the application (i.e., either a content- or operation-based tab/module). It occurs only in the main application menu, **NOT** in dialog boxes. The BCT at HECM launch shows the domain name only. If the user has access to multiple domains, the dropdown domain selector is present, showing by default the first domain in the list (it sorts alphabetically ascending by default). See the [Operation-based Behavior](#) description of the BCT for an example of each.

2.1.6.1. Content-based Behavior

The BCT serves as a reliable, quick-reference gauge of the user’s current location within a content directory structure. When working with content directly (e.g., when in Browse, Search or Viewer), the BCT starts with the domain root (preceded by the generic domain icon and labeled with the name of the domain itself) and proceeds down the directory tree to the user’s currently selected folder. Each tier of the path is clickable, which allows the user to jump from level to level as desired (provided that the user’s folder access rights allow it). File names do **NOT** appear at the end of this path, only the folder at the lowest level (i.e., the parent of a selected object).

The BCT’s behavior is simple: it shows the lowest common denominator of all files in a set. In other words, it shows the path to the common parental folder to a group of files/folders as a whole, even if said commonality exists only at the top node (domain) level. This behavior is consistent when the user selects none, one or multiple line items.

2.1.6.2. Operation-based Behavior

The BCT shows the domain name/selector when **NOT** working with content directly. The generic domain icon precedes the domain label. If a user has access rights to multiple domains, the domain indicator displays as a dropdown in the [BCT](#), from which the user can switch between domains at will.



↑ Figure 22: Non-content, Single- and Multi-domain BCT

2.1.6.3. Inter-tab Dynamics

If the user is in Search, for example, and clicks on a folder link in the BCT, the application takes the user to the Browse tab/module, highlights and expands the folder in the [LSP](#), and displays the folder contents (including child folders) in the [MCP](#). See also [Sortable Columns](#) for sorting rules.

2.1.6.4. Long Path Truncation

The contents of the BCT do **NOT** wrap. The BCT displays as much of the path that fits in the available space, adapting truncation in real time to dynamic window conditions (any resizing operation, folder changes, etc.). There is, however, a limit to how much horizontal space the BCT can claim for itself, regardless of whether the path itself is too long or HECM window resizing causes the situation. Either way, the [OCD-1](#) can **NOT** be displaced, so the BCT must truncate itself *after* the domain name and folder indicator (>) with an ellipsis (...). The ellipsis replaces only as much of the path as is necessary, even if it means showing a partial folder name. The image below demonstrates this truncation schema.



↑ Figure 23: Truncated Multi-Domain BCT

When the mouse pointer hovers over any portion of the path, a tooltip displays the entire path. If the tooltip itself should be too long to display in one line, it wraps.

2.1.6.5. Font Attributes



↑ Figure 24: BCT Font Attributes

2.1.7. Object Count Display (OCD)

2.1.7.1. Alignment and Behavior

Right-aligned on the same line, horizontally opposite the [BCT](#), the object count display (OCD) indicates the list view count for the current folder (or domain, whichever is applicable at the moment). Both folders and files add to the count, but only those that are “visible,” based upon the user’s security access rights. In other words, a folder may contain 20 items total (files and/or folders), but a restricted user may see only five of them.

Conversely, for the same folder, a user with full rights will see all 20. The syntax and formatting for the OCD is: number in bold followed by the word “objects” in lower case, right-aligned. If there are no child objects, the OCD displays “0 objects.” See the [Font Attributes](#) section for OCD font attributes. It occurs only in the main application window, **NOT** in dialog boxes. See Application Detailed View in [The Three Panes](#) section for an example in context.

Space provision for three (3) digits, plus a six-pixel buffer on each side of the text, guarantees that the [BCT](#) length will never affect the OCD.



↑ Figure 25: The BCT and OCD-1

2.1.7.2. Font Attributes



↑ Figure 26: OCD Font Attributes

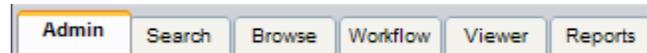
2.1.8. Navigation Tabs

The main navigation tabs in HECM serve as single-click vectors to the primary modules of the application. For details of the proposed visibility feature, see [Tab Row Persistence](#). At HECM launch, the user’s role dictates the initial active [tab](#) and what options exist in the [cascading](#) and [right-click](#) contextual menus. Standard users land on the Search tab/screen and see only Admin options regarding a few personal settings. Contextual menu options are also limited by the user’s access rights, as certain controls and menu items are

either disabled or absent. System administrators, on the other hand, land on the Admin tab/screen and enjoy a wider range of controls and permissions in addition to their own personal settings. For more information and an example, see [Title Bar](#).

Note: the following are presented in the order they appear in the interface from left to right, not alphabetically.

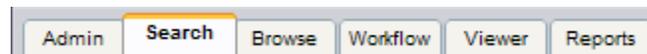
2.1.8.1. Admin



↑ Figure 27: Admin Tab

Upon logon, if the user’s role is that of administrator, the default landing area is the Admin tab. For the *system administrator*, this tab has a dual role: it provides quick access to the system administrative module, where one can manage users, groups, ACLs, roles, worklists, reports, metadata, domains, folders, mail server configuration, content types and more; it also gives the means for the Administrator to manage personal user settings, such as auto logoff configuration and logs. For the *standard user*, this tab’s singular function is to give the means for personal user settings management, such as auto logoff and logs. Whereas system administrators land on the Admin tab upon logon, other users do **NOT**; they land on Search.

2.1.8.2. Search



↑ Figure 28: Search Tab

The function of the Search tab is to jump immediately to the Search form, so that the user can personalize a search to locate and retrieve specific content. The module complements Browse, while it offers more powerful means to sift (i.e., proactively "filter" expected results via specific criteria, such as name, creation date, version, type and other metadata and properties), locate and sort files. Search is the default landing tab at logon for users *without* system administrator privileges. Also, see an [example of the Search form](#).

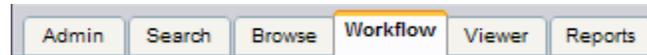
2.1.8.3. Browse



↑ Figure 29: Browse Tab

The Browse tab allows the user to navigate through a familiar hierarchical directory tree to manage content. Considerably more basic in functionality than its Search counterpart, Browse works well for manipulating content routinely accessed from specific folders. It is well-suited for users that rely upon a formally defined folder structure rather than metadata to store and retrieve content. Also, see an [example of the Browse screen](#).

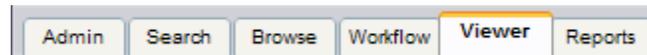
2.1.8.4. Workflow



↑ Figure 30: Workflow Tab

The Workflow tab delivers the user to a sophisticated “to do” list of tasks and their various assignments, statuses, deadlines and other tracking criteria. The module affords the ability to manage (e.g., add, delete, assign and reassign) worklists and tasks according to a logical and prescribed process.

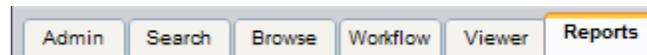
2.1.8.5. Viewer



↑ Figure 31: Viewer Tab

The Viewer tab/module allows the user to view content in a read-only environment. In this mode, the user can **NOT** permanently alter a system-resident file in any way, though zoom, rotate, flip, book view and other presentation options exist. The application natively supports a large number of popular formats. In the event that HECM can **NOT** internally handle rendering of a file, it hands off the task to another application. Content is **NOT** directly accessible in the Viewer tab; the user must first choose a piece of content from elsewhere in the system, such as in the Search or the Browse modules or in cases where content is linked to task.

2.1.8.6. Reports



↑ Figure 32: Reports Tab

For the *system administrator*, this tab has a dual role: it provides quick access to system audit, account maintenance and matrix reports; it also gives the means for the Administrator to manage personal user reports regarding content manager, content loader and workflow. For the *standard user* (i.e., one lacking system administrative privileges), this tab's singular function is to give the means for the same personal user reports mentioned above.

2.1.9. The Three Panes

2.1.9.1. Overview

As far as layout and appearance are concerned, the HECM application's main interface exists within the framework of a common window. It borrows heavily from the typical left-hand navigation scheme so prevalent in the Web world and a number of popular Microsoft products, among them Windows Explorer, Outlook and Visio.

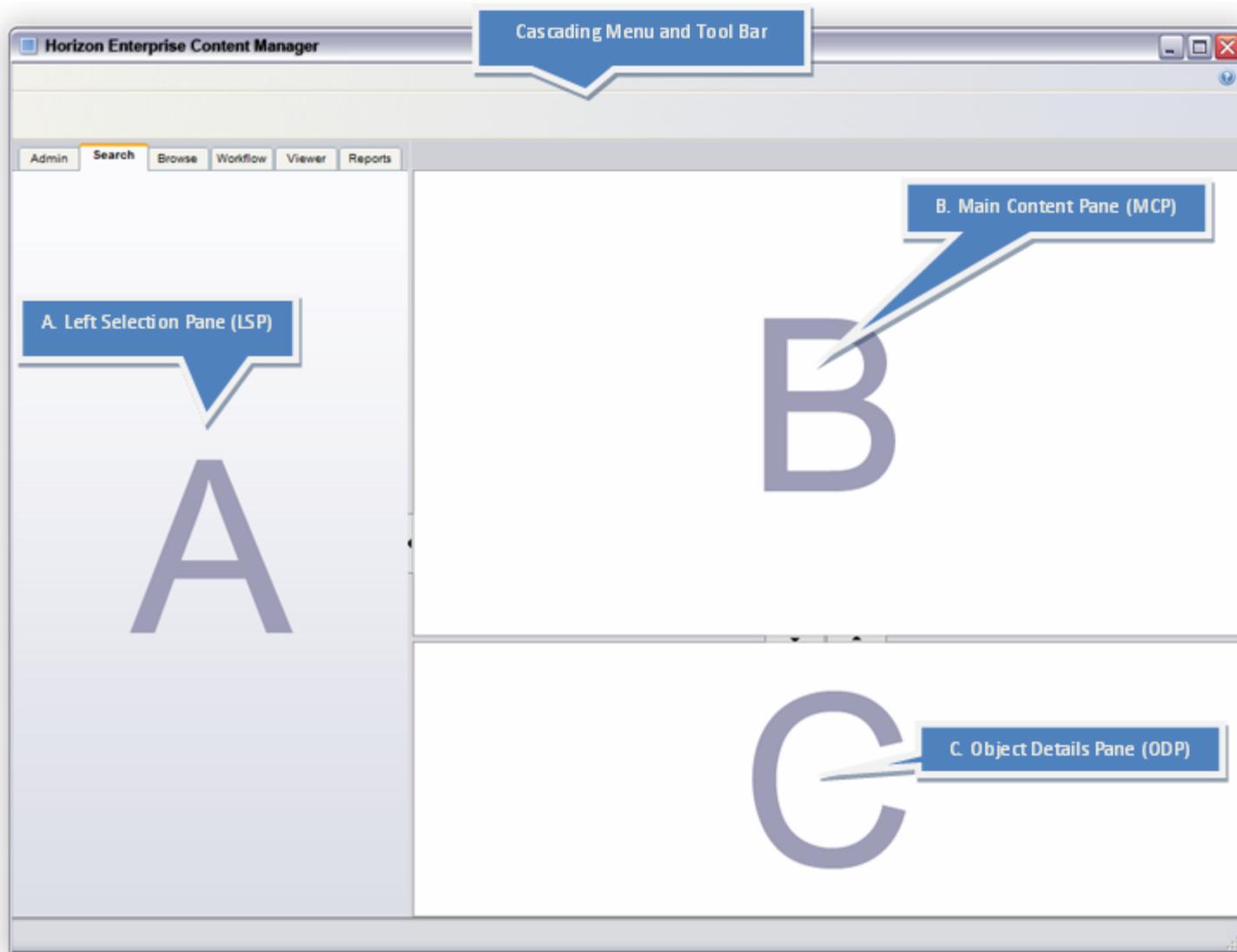
Immediately noticeable, the standard [cascading main menu](#) and [button toolbar](#) combination stretches across the upper portion of the window. All common commands used throughout the application occur in the menus. Their enabled or disabled statuses depend upon what type of object is being viewed, what the user's role is, where he or she is in the application and what security rights he or she enjoys.

Nestled below the menus and the buttons are the [main navigation tabs](#) on the left and the [breadcrumb trail](#) and [object count display](#) on the right. These divide the user experience into logically separated components by function, and provide persistent contextual feedback on the user's location and operations.

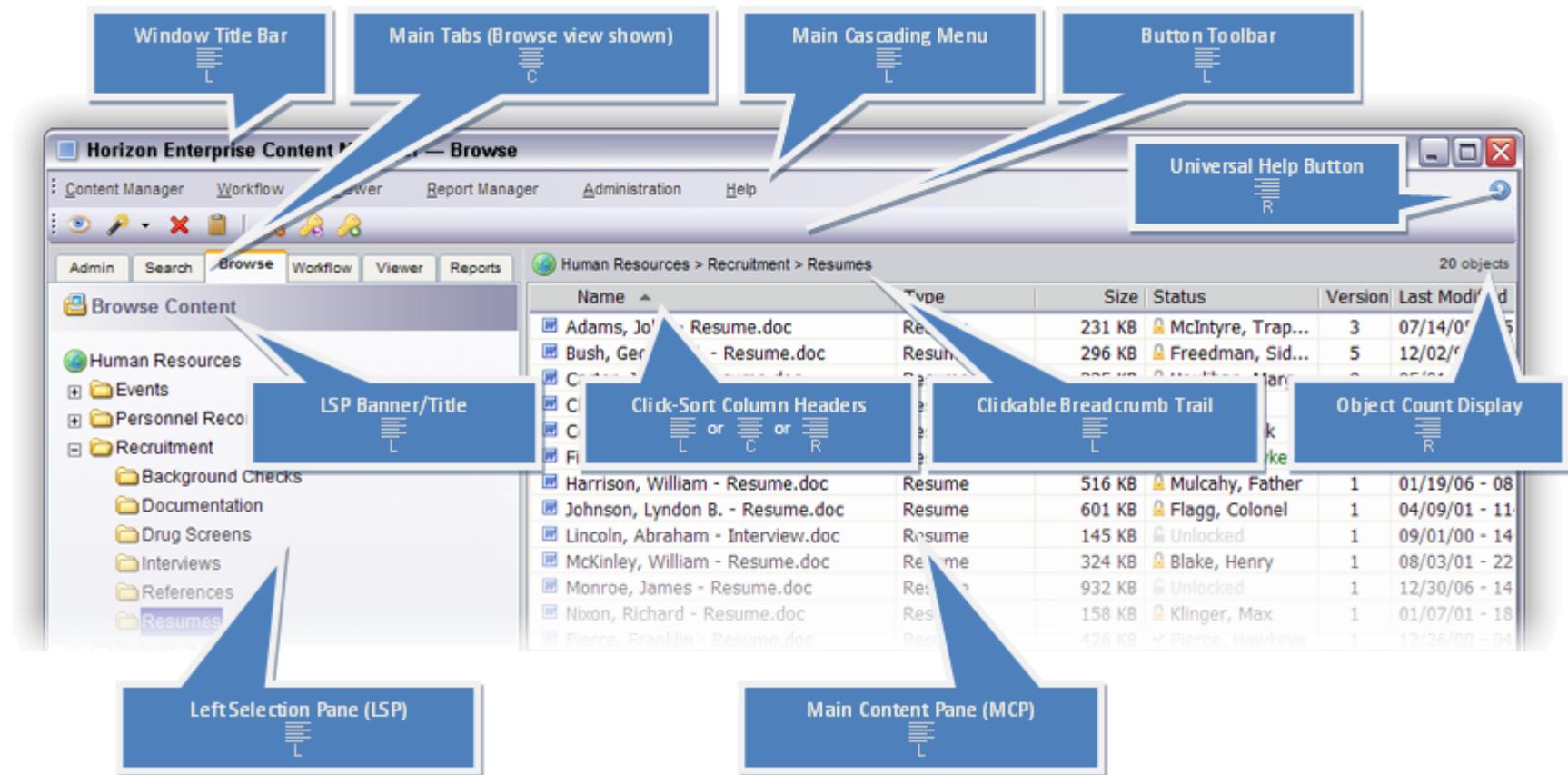
Below, the three main components of the UI dominate the display; they are:

- the collapsible [Left Selection Pane \(LSP\)](#), or "Left Pane"
- the collapsible/expandable [Main Content Pane \(MCP\)](#), or "Main Pane," and breadcrumb trail navigation assistant combination
- the collapsible/expandable [Object Details Pane \(ODP\)](#), or "Details Pane," which appears only when required

All panes share some common features. In particular, all scroll vertically and horizontally *when required to accommodate content*. When scrollbars are not needed, they are simply not visible.



↑ Figure 33: HECM Pane Arrangement



↑ Figure 34: Application Detailed View

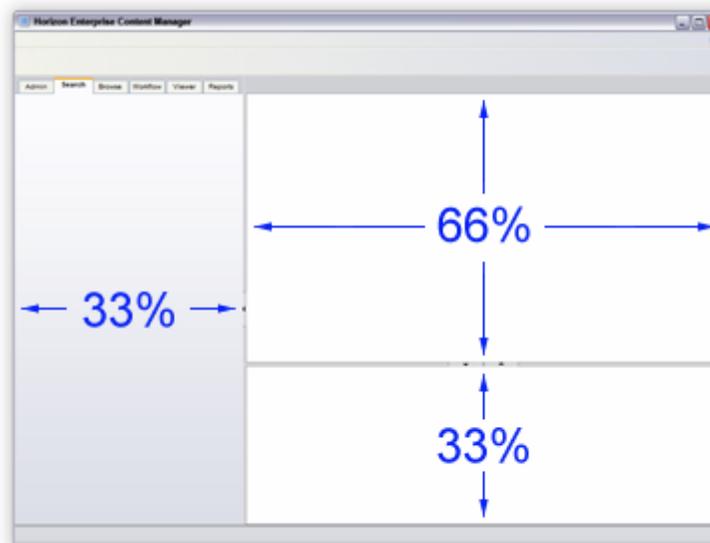
Note: A column can **NOT** align different ways simultaneously. Sorting does **NOT** effect alignment at all. The above is meant to convey that there are three possible alignment choices for any given column, whereas most other elements of the UI have but one.

2.1.9.2. Expansion and Collapse

The three panes in the HECM application are divided by two shared, resizable pane separators. The resize feature is zero-sum, meaning that the space one gains is at the expense of the other(s). The expand/collapse control sits in the center of each pane separator; arrows indicate which way a click will send the separators.

The custom controls shown in these sections describing pane behavior are intended to appear in Release 1, but may be deferred depending upon resources available to Development. Development will employ default .NET controls, and should time allow later in the cycle, create the custom ones described here.

2.1.9.3. Space Allocation



↑ Figure 35: Default Pane Space Allocation

Default pane widths are one-third of the available horizontal space (application left edge to right edge) for the [LSP](#) with the remaining two-thirds allocated to the [MCP](#) and/or [ODP](#). Vertically, the [LSP](#) gets 100 percent, while the [MCP](#) takes two-thirds and the [ODP](#) one-third. Unless the user explicitly changes the pane separator placement(s), they remain in the same arrangement, regardless

of whether or not the user moves to another tab. Should the [ODP](#) “disappear” when it is not required, its “reappearance” will be in exactly the same spot as previously, whether it was system default or user-directed. The locations of the pane separators *persist throughout a given session*, but return to their defaults each time the user logs back on. Future releases of HECM could possibly track pane separator locations from session to session as part of a user’s configurable, personalized user settings/profile. This is, however, out of scope for Release 1.

2.1.10. Left Select Pane (LSP)

2.1.10.1. Overview

The multi-purpose Left Select Pane (LSP) modifies, in most cases, the content of the main content pane ([MCP](#)). A variety of navigation and operation-oriented presentations can co-exist in the LSP. For example, one can run searches, browse or navigate throughout the system. In a typical case, the main navigation tabs represent the top-level area, while menu trees or collapsible/expandable categories within the tabs allow the user to drill down to logically grouped operations.

LSP forms, when they exist, are “mini-forms.” To fit more effectively in the tight space, controls, labels and text are smaller versions, single column-stacked and packed more tightly than their larger, more liberally spaced brethren in the [MCP](#). This minimizes the need for excessive scrolling.

“Search” is an example of a form-driven, operations-oriented LSP function. Search criteria and parameters are selected in the LSP, while results appear in a grid list in the [MCP](#). On the other hand, other actions—such as “Browse” and “Admin”—see the user merely selecting an operation from a collapsible/expandable category or navigating down a directory tree to reach a specific set of operations or a filtered result set.

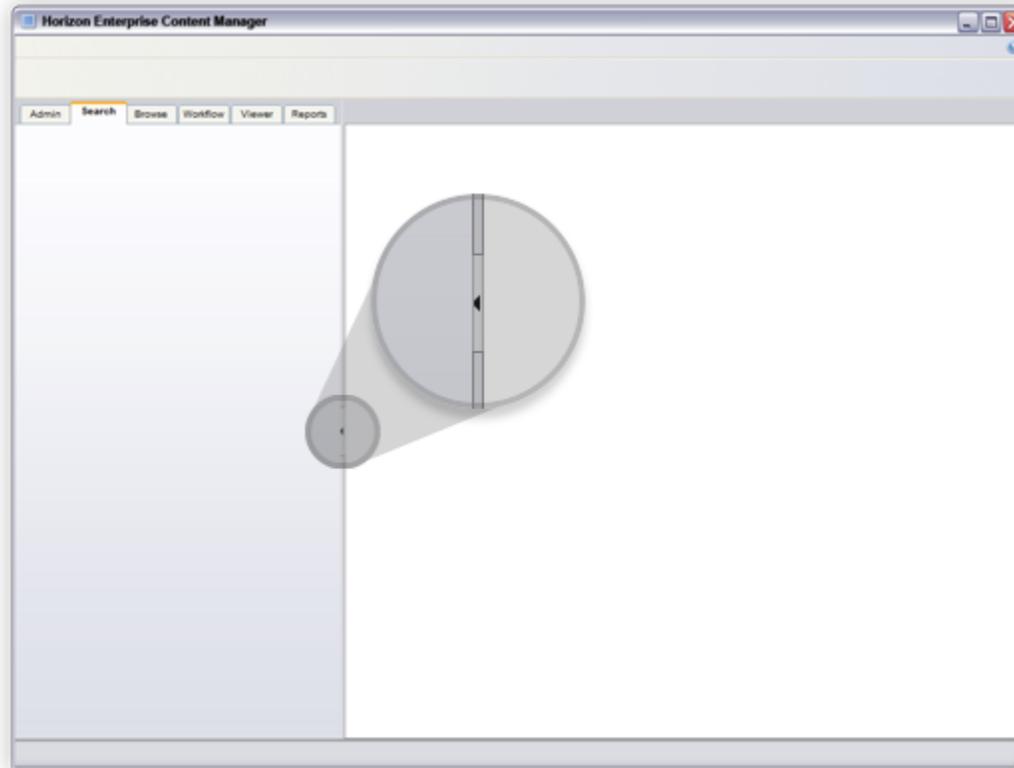
The contents of the LSP change based upon a variety of command vectors. The most obvious are the main navigation tabs located just above the LSP. These are, from left to right, Admin, Search, Browse, Workflow, Viewer and Reports. Other content changers are the cascading menu, the button bar and the breadcrumb trail.

The LSP is collapsible to the left margin, where its control arrow changes direction (from left- to right-oriented) to indicate its expandability.

2.1.10.2. Pane Resize Behavior

For the LSP, clicking the control toggles between collapse to the left application window edge and expansion to the expanded setting. Of the three panes, the LSP is the simplest, because it does **NOT** *automatically* expand to the right edge with a click on the

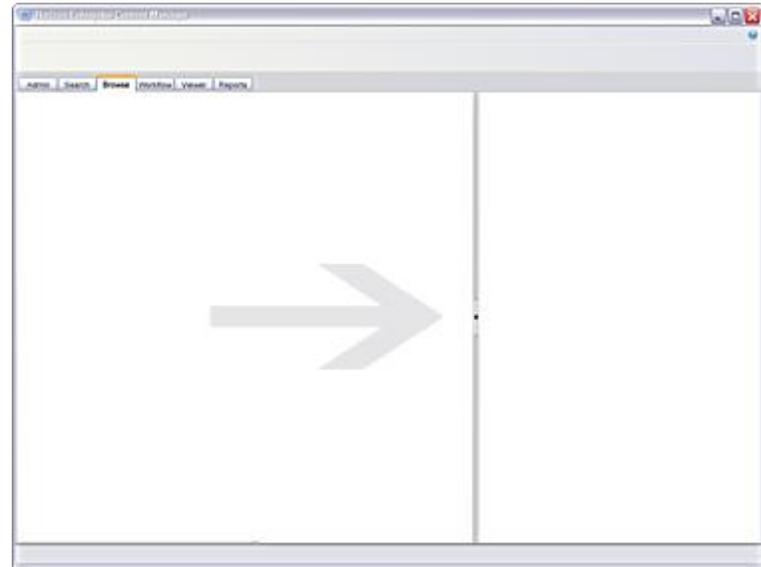
control (this can be achieved manually, however, via a click-and-drag). There are only *two* states: collapsed left and expanded (default or user-defined), with the arrow on the control merely switching direction. The figure below shows the [ODP](#) present with the LSP in the (left-)collapsed state.



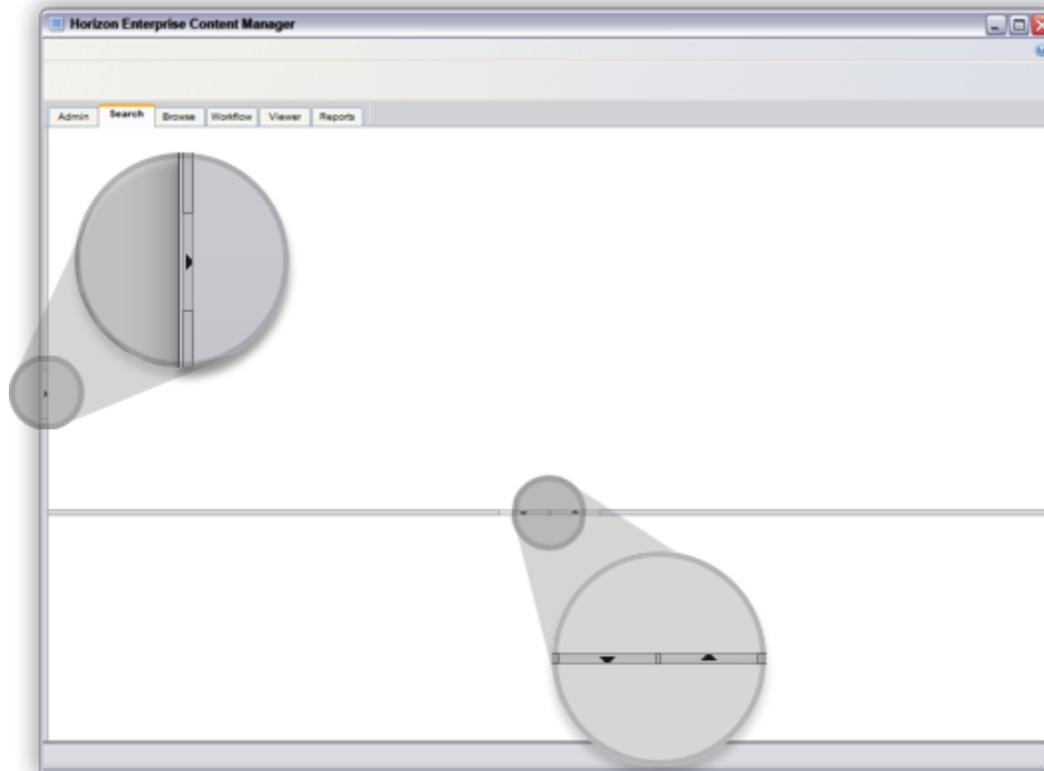
↑ Figure 36: Default LSP/MCP Expanded State with Zoomed Control (ODP Absent)



↑ Figure 37: LSP in Collapsed State

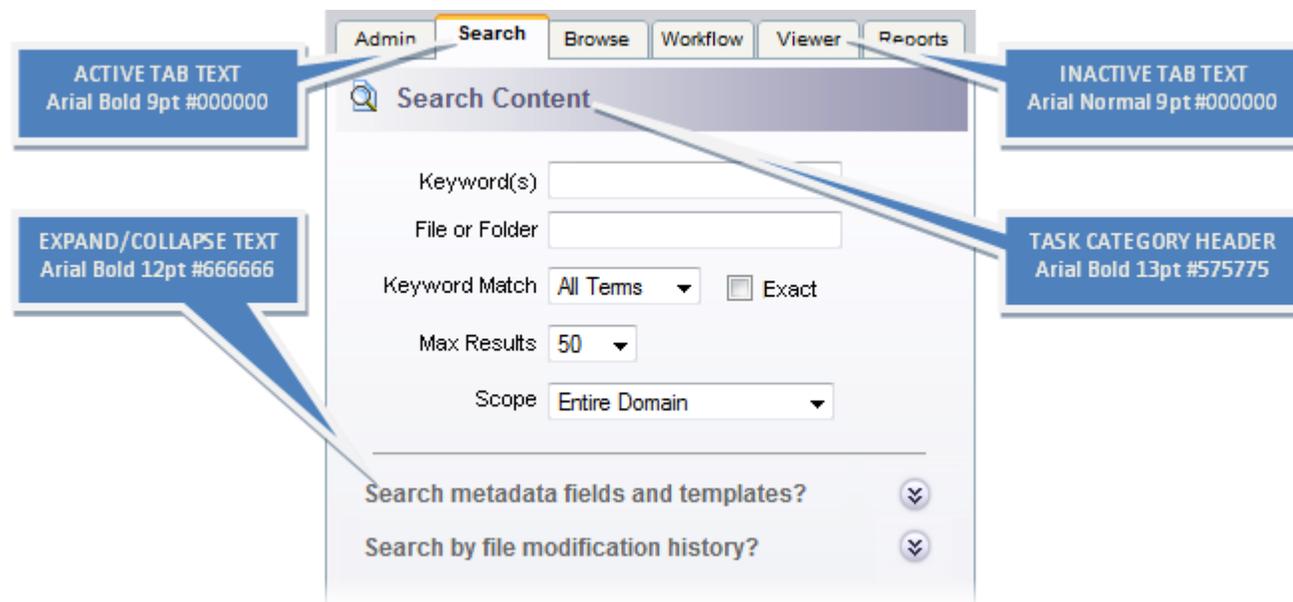


↑ Figure 38: LSP in Manually Expanded State



↑ Figure 39: Default MCP/ODP Heights with Collapsed LSP and Zoomed Controls

2.1.10.3. Font Attributes



↑ Figure 40: LSP Font Attributes

2.1.11. Main Content Pane (MCP) 

The Main Content Pane (MCP), as mentioned above, depends largely upon input from the [LSP](#), and, secondarily, from other command vectors elsewhere. If the [LSP](#) presents the user with more general selection categories and operations, the MCP displays the specific. For example, a user can search for content via the [LSP](#) and then view the result set in the MCP. Upon selecting a list item in the MCP, the user can then view specific details of a given file, such as metadata, properties, comments and signatures. Furthermore, the user can elect to view or edit a file as desired.

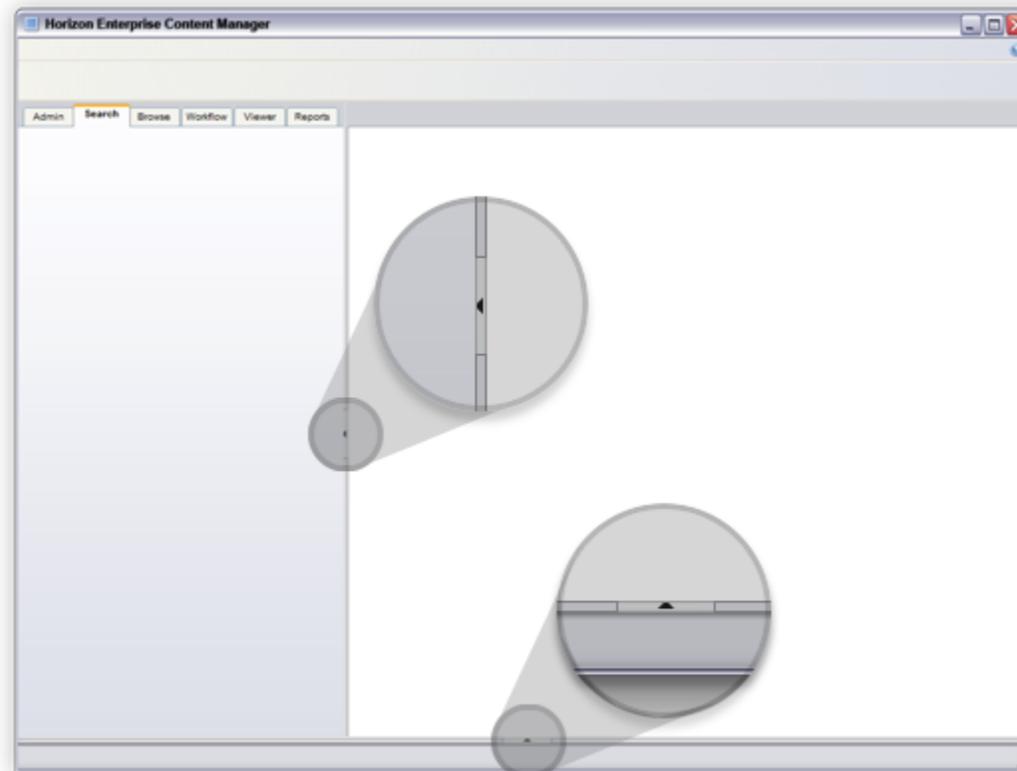
From Browse in the [LSP](#), the user drills down through the directory tree from the domain level down to a specific. The behavior of the MCP in this case is virtually identical to that of Search. Workflow and Reports follow a similar method of perusing lists of worklists and report types in the [LSP](#), to selecting and managing operations and reports in the MCP. When in Viewer mode, the native content viewer loads the read-only files one at a time into the MCP. Collapsing the [LSP](#) maximizes the view space in the MCP.

2.1.12. Object Details Pane (ODP)

Located beneath the [MCP](#), the Object Details Pane (ODP) represents the final level of increasingly specific data presentation to the user. In a typical scenario, the user first selects a tab, then an operation category and operations from the list in the [LSP](#) (for example, a search with particular criteria). The [MCP](#) populates with a list of objects and their high-level details. The user sorts and peruses the list, then selects a particular line item. The ODP then takes its cues from this selection and displays the detailed information and operations associated with the object in question.

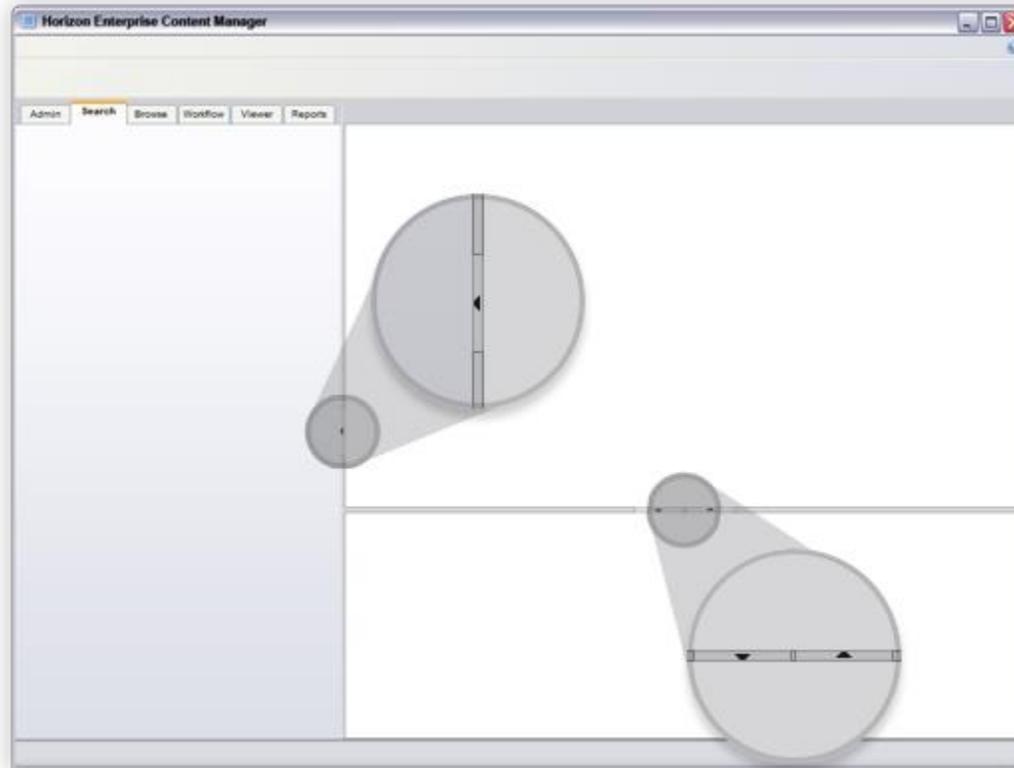
When the operation or information specificity display level does **NOT** require the ODP, the system removes it completely (i.e., it is **NOT** even shown in its collapsed state). In a multi-select situation, the ODP remains visible at the same position, but *removes all content from itself*.

The [MCP](#)/ODP expansion and contraction behavior is similar to that of the [LSP](#), but with *three* distinct states: collapsed down ([MCP](#) maximized vertically), expanded (default or user-defined, in which the [MCP](#) and ODP in some fashion divide up the window's vertical space) and collapsed up (ODP maximized vertically). The figure below demonstrates the ODP in the collapsed-down state.



↑ Figure 41: Default LSP Expanded State and Collapsed ODP with Zoomed Controls

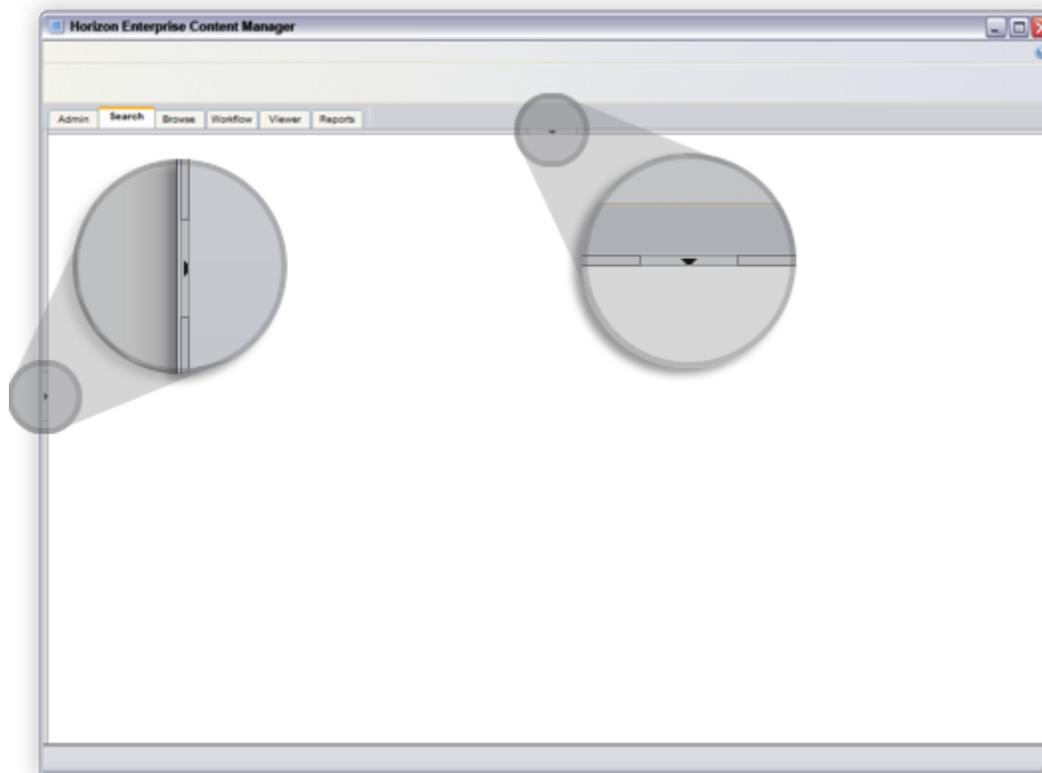
The example below demonstrates the system default expanded view. Notice the bi-directional control on the [MCP](#)-ODP separator. As expected, a click on the down arrow control collapses the ODP down, maximizing the [MCP](#) vertical space. Likewise, a click on the up arrow collapses the [MCP](#) up, maximizing the ODP vertical space.



↑ Figure 42: Default LSP/MCP/ODP Expanded States with Zoomed Controls

In this final example, the entire window area is devoted to the ODP. Generally speaking, this is probably not the most judicious use of screen real estate, but the user can elect to do this, nonetheless. In some cases, this may be a useful configuration, especially, for example, if the Details Pane contains a lot of metadata or other information that would otherwise require excessive horizontal and/or horizontal scrolling.

Note that in both the collapse-up and collapse-down scenarios, the double direction control becomes a single one, which points back to the one direction it can go. In both cases, subsequent clicks in the same direction cycle through one collapsed state, through the (default or user-defined) expanded state to the other collapsed state.



↑ Figure 43: LSP Collapsed, MCP Collapsed and ODP Expanded with Zoomed Controls

2.2. Dialog Boxes

2.2.1. Relationship with Parent

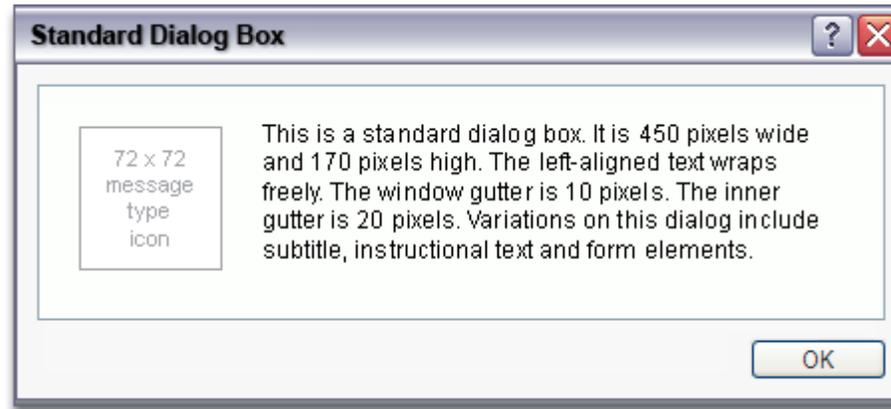
Dialog boxes appear horizontally and vertically centered atop the triggering shell display (that is, the HECM main window, not necessarily the center of the monitor, unless HECM is maximized). That is to say, the parent window is never blank; instead, it contains the fully rendered display the user had just seen prior to the pop-up launch. The only exception to this rule regards auto logoff, in which case the user sees a “stripped” version of the main application window.

Users often use buttons to launch dialog boxes to complete a specific operation, such as looking up and selecting users, groups, content, etc. Such button labels are verbs that describe the operation followed by an ellipse (...). The ellipse cues the user that the operation continues in a popup window, not the main application window. An example would be “Reassign...,” which launches a dialog box, whereas “Own” occurs in the parent window.

Likewise, if the operation is known to consistently launch an external editor/viewer application or leverages some inherent Windows functionality—such as a “Browse Folder” dialog—it is appropriate to use the ellipse in such cases as well. However, in the event that an action switches the interface to another section within the same window—for instance, a different tab in the ODP—do NOT use the ellipses after the verb.

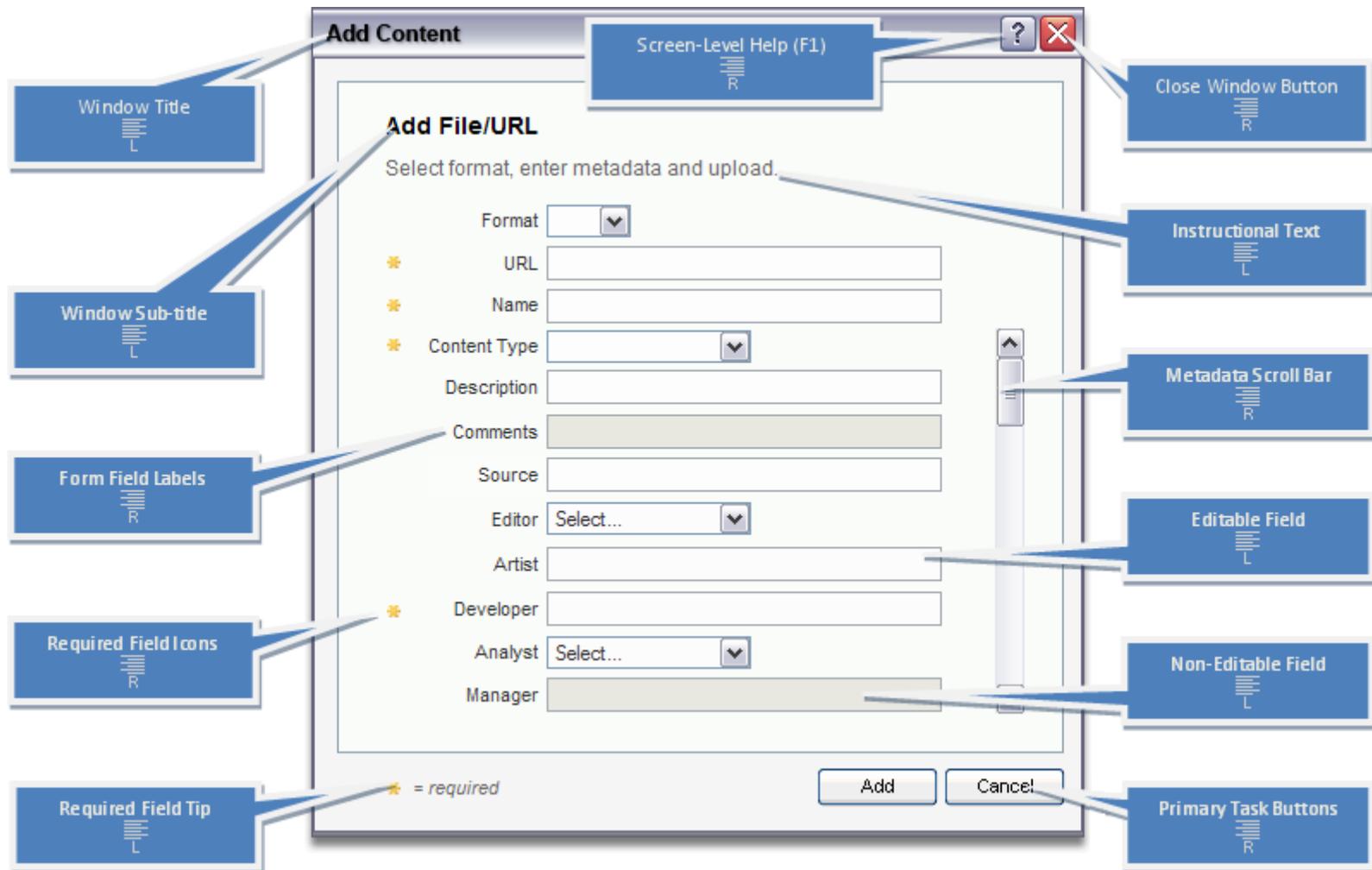
2.2.2. Pop-up Anatomy

2.2.2.1. Window Dimensions



↑ Figure 44: Standard Dialog Box

Maximum typical dimensions are 500 pixels wide x 600 pixels high, though there are a few exceptions to this rule. Use scrollbars, but only if absolutely necessary. See actual-sized example image below. The standard dialog box’s dimensions are fixed at 450 pixels wide x 170 pixels high.



↑ Figure 45: Jumbo Dialog Box with Form

2.2.2.2. Title Bar

For the sake of consistency in informing the user of where they are and what the consequences are of their actions, dialog window titles take on the verbiage of the trigger that spawned them; thus, a button that reads “Add Content” results in a dialog box with an “Add Content” title. A “Reset Password” dialog will have assumed the namesake of its corresponding cascading menu selection. Both the icon and the “Horizon Enterprise Content Manager” text are absent from pop-ups.

Note that [title bar](#) specifications for dialog boxes differ from those of the main window. See also [status bar](#).



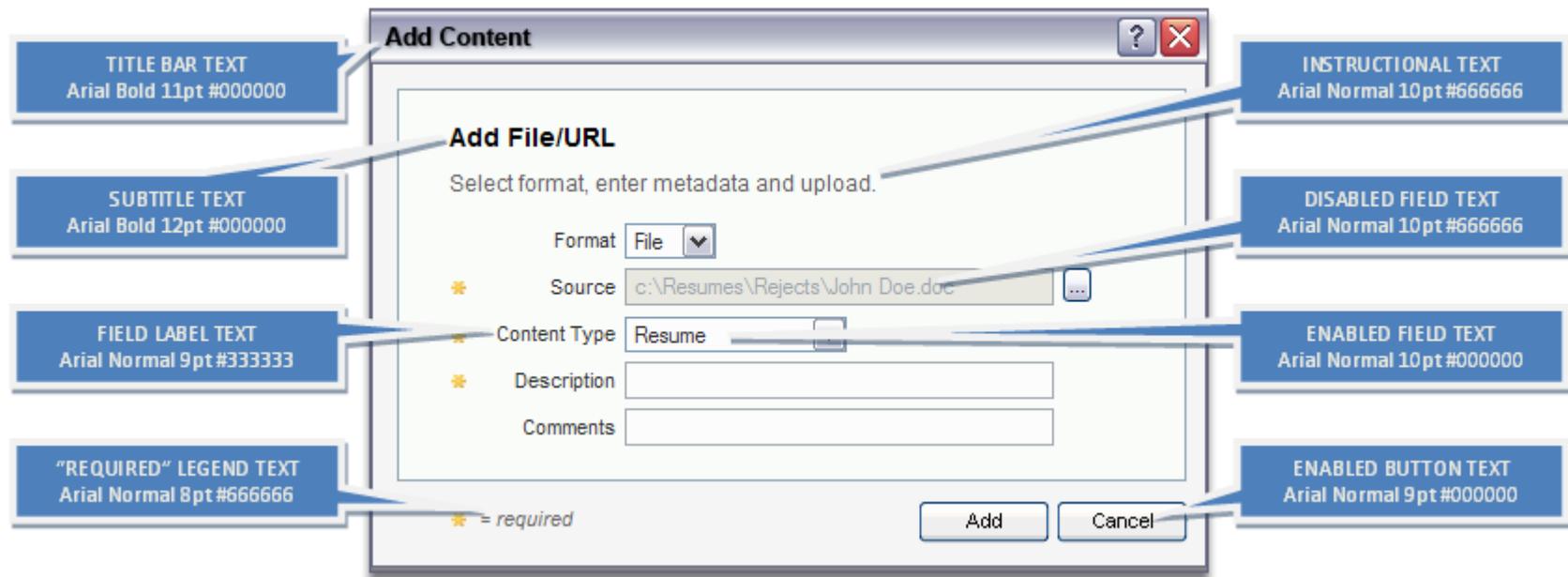
2.2.2.3. Modality and Resizing

All dialog boxes in HECM are modal, *except for Help*. Help is not modal by design, so that the user can continue to simultaneously work in HECM and reference the Help window at will. Modality is application-level, not system. Dialogs do **NOT** resize in any fashion.

2.2.2.4. Status Bar

Dialog boxes do **NOT** have status bars.

2.2.2.5. Font Properties



↑ Figure 46: Dialog Box Font Attributes

2.3. Forms

2.3.1. Layout

In general, form elements are stacked vertically in a form. This is particularly true of forms in the [LSP](#) and in pop-up dialog boxes. In the [MCP](#), [ODP](#) and in jumbo dialogs, form elements may display in two columns. Think of a form element as comprised of four parts:

- required field indicator, when applicable
- form element text label
- the (enabled or disabled) form element itself
- post-validation tooltip-equipped error icon, when applicable

Often data or operations logically group together on the same screen and in close proximity. For example, add, delete, view and rename operations can fall under the common label “Manage.” Likewise, data like street, city, state and zip code can be said to fall under the category “Address Information.” Be constantly alert to these logical conglomerations, as they make the user interface more intuitive, easier to use and orderly.

2.3.2. Common Elements

HECM uses a number of form elements users recognize from the Windows operating system and browser-based applications. See also [Field Labels](#). **Note:** appearance will vary between operating systems; examples are from Windows XP Service Pack 2.

2.3.2.1. Labels

All labels sit right-aligned to the left of form elements. Labels next to (radio buttons and checkboxes) are also clickable. A colon (:) does **NOT** follow any label. Labels do **NOT** wrap, except in extreme circumstances when severe space limitations so dictate.

2.3.2.2. Sortable Columns

Tables are always sortable by column header, unless otherwise specified. A subsequent mouse-click on a column header reverses the previous sort. Tables are default sorted by the first column in ascending order, unless otherwise specified.

Clicking a different column to sort triggers an ascending order sort. Click the same column a second time to descend-sort. Sorting is case-insensitive (i.e., a=A). Ascending sorts have an upward-pointing triangle, while descending have a downward-pointing triangle.

Null or blank values are treated as the first items in an array sorted in ascending order. See sort order for column values, below.

Sort Type	Alphabetical	Numerical	Alphanumeric	Dates	Directories	Checkboxes
 Ascending	Low → High (e.g., null, a, b, c...)	Low → High (e.g., null, 1, 2, 3...)	Low → High (e.g., null, 1, 2, 3, a, b, c...)	Earlier → Later (e.g., null, Jan. 1, Feb. 1, Mar. 1...)	Folders → Files Low → High	<input checked="" type="checkbox"/> → <input type="checkbox"/>
Descending 	Low ← High (e.g., c, b, a, null...)	Low ← High (e.g., 3, 2, 1, null...)	Low ← High (e.g., c, b, a, 3, 2, 1, null...)	Earlier ← Later (e.g., Mar. 1, Feb. 1, Jan. 1, null...)	Folders ← Files Low ← High	<input checked="" type="checkbox"/> ← <input type="checkbox"/>

Note: Checkboxes take primary sort when their headers are clicked, then the next column (e.g., “Name”) takes secondary sort.

The following example shows an alphabetical, ascending sort of some fictitious files.

Name ▲	Type	Size
Adams, John - Resume.doc	Resume	231 KB
Bush, George W. - Resume.doc	Resume	296 KB
Carter, Jimmy - Resume.doc	Resume	235 KB
Clinton, William J. - Resume.doc	Resume	561 KB
Coolidge, Calvin - Resume.doc	Resume	778 KB
Filmore, Millard - Resume.doc	Resume	826 KB
Harrison, William - Resume.doc	Resume	516 KB
Johnson, Lyndon B. - Resume.doc	Resume	601 KB
Lincoln, Abraham - Interview.doc	Resume	145 KB
McKinley, William - Resume.doc	Resume	324 KB
Monroe, James - Resume.doc	Resume	932 KB
Nixon, Richard - Resume.doc	Resume	158 KB
Pierce, Franklin - Resume.doc	Resume	426 KB
Roosevelt, Franklin D. - Resume.doc	Resume	849 KB

↑ Figure 47: Column Header Sorting

2.3.2.3. Text Fields ★

Standard Size

- **Width:** 200 px fixed
- **Height:** one 20-px-high row (including 1-px border)
- **Max Characters:** 80
- **Wraps:** No

Intermediate Size

- **Width:** 500 px fixed
- **Height:** one 20-px-high row (including 1-px border)
- **Max Characters:** 250
- **Wraps:** Yes

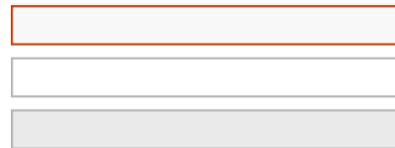
Jumbo Size

- **Width:** 500 px fixed

- **Height:** three 20-px-high rows (including 1-px border)
- **Max Characters:** 500
- **Wraps:** Yes

Hybrid Size

- **Width:** 200 px fixed
- **Height:** three 20-px-high rows (including 1-px border)
- **Max Characters:** 250
- **Wraps:** Yes



↑ Figure 48: Standard Text Fields (Error, Active and Inactive)

Use text fields to collect free-form user text input and secondarily to display pre-populated text. They are blank by default, unless otherwise specified. Wrapping applies to jumbo-sized fields only. Employ such fields sparingly. For example, “Comment” and “Description” fields implicitly call for longer text strings than, say, “First Name.” In the [MCP](#) and [ODP](#) where two columns of elements are common, span long fields across the columns (so that they do not dictate column width). Examples are for comments or descriptions, which require more space). For more information on colors and fonts attributes associated with text fields, see [Messaging](#) and [Fonts](#).

Note: In the [LSP](#) where space is limited, use the *hybrid field* instead of jumbo.

2.3.2.4. Dropdowns 

Standard Size

- **Width:** variable, dictated by content (no fixed size)
- **Height:** one 20-px-high row (including 1-px border)
- **Max Characters:** N/A
- **Wraps:** No



↑ Figure 49: Dropdowns

Primarily used for selecting a single value from two or more that must be explicitly spelled out (for simple toggles—a simple binary choice—single checkboxes, checked or unchecked, are usually more useful and real estate-efficient). The default initial value is “Select...” or “Select <item>...”, unless otherwise specified. In the absence of other instructions, values should be shown in alphabetical order. Length of the element is only as long as the contained text (i.e., no fixed width).

2.3.2.5. Checkboxes

Standard Size: .NET default

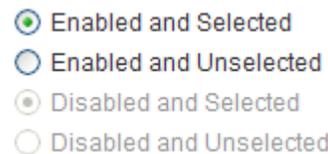


↑ Figure 50: Checkboxes

Checkboxes are binary switches: they toggle a single item on and off. By default, checkboxes are blank (unchecked), unless otherwise specified. Dimensions are Windows standard. Checkboxes are center-aligned in columns, when used. However, HECM does not use Checkboxes to select tabular data. Clicking the box itself or the label toggles the checkbox if it is enabled. For checkbox sorting details in grids, refer to the table in the [Sortable Columns](#) section.

2.3.2.6. Radio Buttons

Standard Size: .NET default



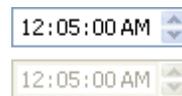
↑ Figure 51: Radio Buttons

Radio buttons are also binary switches when used in pairs. When three or more are used in conjunction, they present the user with mutually exclusive selection options (i.e., only one can be chosen at a time). By default, radio buttons are blank, unless a default selection is otherwise specified. Radio buttons align left with other form elements, but generally labels do **NOT** accompany them to their left. A group of radio buttons extends out horizontally on the same line, as they are **NOT** stacked vertically (unless there is need to wrap, which should be a rare occurrence). For an example of a horizontal group and its affect on tab order, see [Tab Key and Tab Order](#).

2.3.2.7. Spinner Controls

Standard Size

- **Width:** variable, dictated by content (no fixed size)
- **Height:** one 20-px-high row (including 1-px border)
- **Max Characters:** N/A
- **Wraps:** No



↑ Figure 52: Spinner Controls

Spinners are a convenient way to increment or decrement a selection. The user may left-click on the arrow buttons or use the vertical arrow keys (Up is next, Down is previous). The horizontal arrow keys transfer selection left and right to jump from item to item (in the example above, between hours, minutes and seconds. As of this writing, the only example of a spinner control in HECM is the [Time Picker](#).

2.3.2.8. Mover Boxes

Standard Size: Variable, depending upon pane and case-by-case use (no fixed size)



↑ Figure 53: Mover Boxes

Mover boxes are used to transfer list items back and forth between two text areas. By default, usually one is blank and the other is populated. HECM mover boxes have grids to clarify the line item through descriptions, comments and/or other cues.

2.3.2.9. Buttons

Standard (Minimum) Size: 69 pixels wide and 21 pixels high; variable to accommodate content, as required*

69 x 21 px All buttons must comply with the minimal size directive, even those with very short text on them, such as “OK.” Exceptions are specialty buttons, such as title and toolbar, look-up, mover buttons and the like.

*If button text exceeds the standard 69 pixels wide, the text plus its six-pixel buffer dictate button size. See below for illustration.



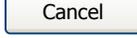
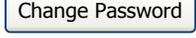
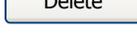
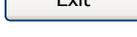
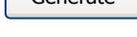
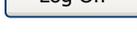
↑ Figure 54: How to Determine Long Button Size

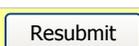
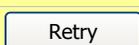
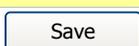
Buttons that are not (yet) usable at a certain point in an operation are visible, but disabled. If, based on a user selection, a button becomes relevant to the operation (for instance, the user enters all required information into a given form), the button becomes enabled. The user may then proceed. For more information, see [Enabled, Disabled or Absent?](#)

Text on buttons use verbs in the imperative and often a noun object for clarification. For example, “Apply Settings” or “Add” is more immediately descriptive and useful at a glance than a vague “OK,” which, by itself, doesn’t tell the user what the button explicitly

does.

Also, word choice for a given button/action must remain constant throughout the application. For instance, although “Add,” “New” or “Create” may all be equally valid choices for a certain operations, one must pick one and consistently use it. For this reason, the following table is maintained to keep track of whether the same button with the same function elsewhere in the application reads, say, “Quit,” “End” or “Finish” instead of “Close.”

Button	Description / Purpose	Status
	Launches a look-up dialog.	
	Transfer Left (all items and single item, respectively); used in mover boxes.	
	Transfer Right (single item and all items, respectively); used in mover boxes.	
	Saves and immediately applies any changes made to a (usually admin) form.	
	Quits the current operation without saving changes (if applicable), but does not exit application.	
	Provides functionality to change a password.	
	Closes and cancels the operation. It returns to a “default” operation specifically defined for that operation area.	
	Used for intermediate steps in a multi-screen operation.	
	Triggers the operation that enables the <i>non-admin</i> user to add a new item.	
	Deletes the active record shown in the displayed form.	
	Closes all open windows and exits the application to the OS desktop.	
	Instructs the application to generate some value, for example, a temporary password.	
	Logs user off of application, but does not quit the application.	

	Triggers the operation that enables the <i>admin</i> user to add a new item.	
	Used in dialogs when the user has nothing to do but acknowledge the box to dismiss it.	
	Refreshes the view (field values, grid data, etc.) of a form by asking the server for the most recent data. Used primarily in operations where a list needs to be refreshed from the server more frequently than upon form submission, or when the user wishes to verify visually the addition of new data in a record or a file to the system.	
	Clears all user-entered data and resets a form to its default state.	
	See Submit.	
	Closes a dialog, so the user can return to a given task and try again.	
	Generic button for general use across the application to save changes and finish a particular operation.	
	Saves any changes made to a (usually admin) form.	
	Clicked after a user enters parameters to run a search.	
	Indicates selection of a line item in a grid.	
	Allows the user to decline a system prompt to undertake some optional operation.	
	Submits and saves data, but does NOT close an operation. Form remains populated and the record remains active in the form until the user clicks [Close] or [New], or selects a different item to edit.	
	Provides functionality to unlock a locked account.	

2.3.2.10. Grids  

Grid sizes, resizing behavior and properties follow .NET defaults.

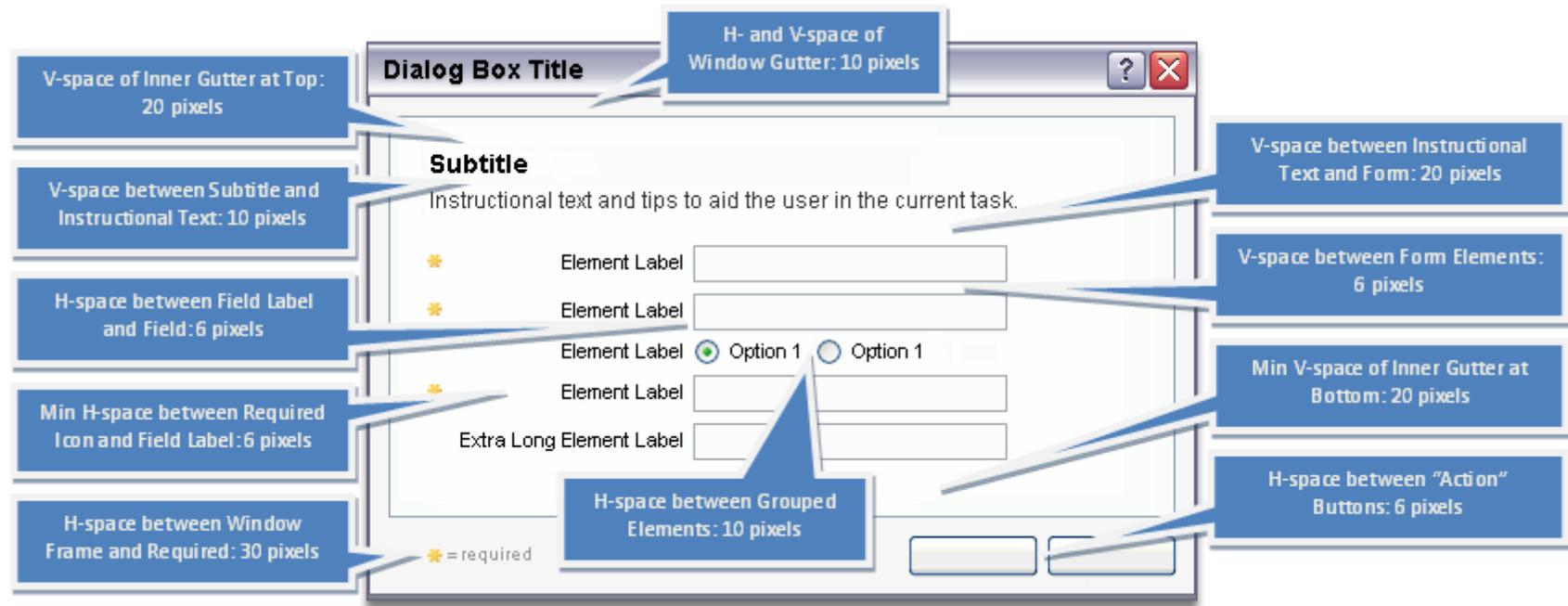
Following .NET standards, if the length of the data in a row cell exceeds the amount of space for the column the name will be truncated and will end in "...". If a user hovers over the data, the tooltip will display the data in its entirety. Neither the "..." nor the tooltip apply to a grid column header.

2.3.3. Spacing, Placement and Alignment 

2.3.3.1. Horizontal Alignment

Alignment	Description / Details
 Left	Numerical grid data
 Left	All form elements (text fields, dropdowns, checkboxes, radio buttons, etc.)
 Left	Most non-numeric text in tables, whether in fields or in cells
 Left	Breadcrumb trail
 Left	Text in the LSP, including banners
 Left	Menu items
 Left	Buttons on the button bar
 Center	Dates and date ranges in tables
 Center	Tab labels (both active and inactive)
 Center	Text and icons on buttons
 Right	Field labels
 Right	Control buttons themselves
 Right	Object count display

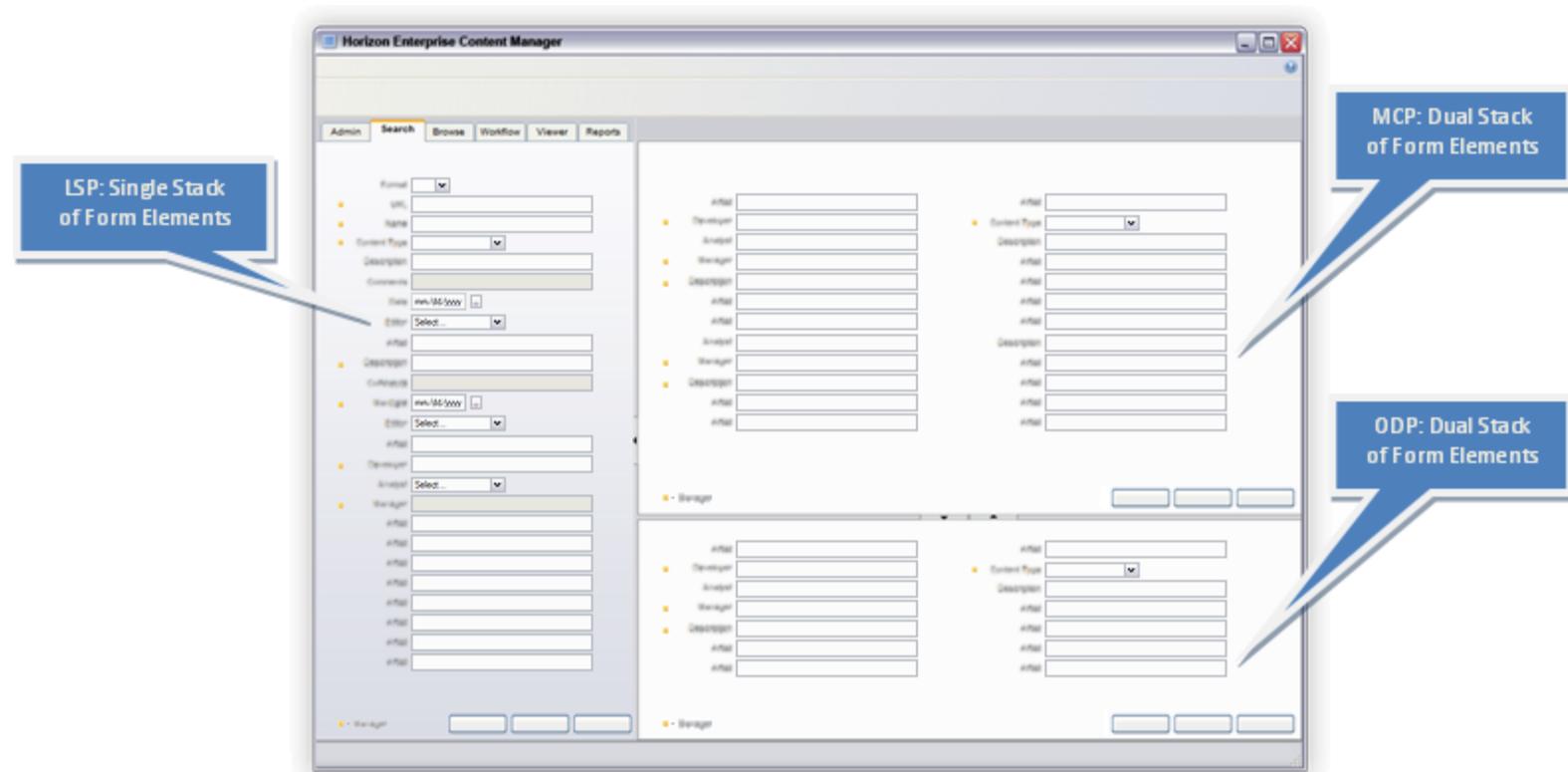
2.3.3.2. In Dialog Boxes



↑ Figure 55: Form Element Spacing in Dialogs

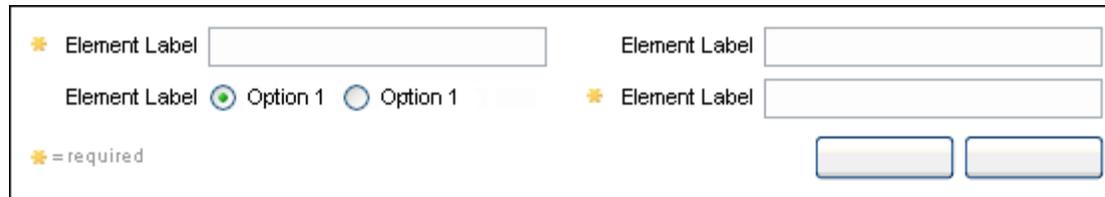
2.3.3.3. In Panes

Form elements in the [LSP](#) stack in a single column. Occasionally, related elements may occupy a single row, but this is the exception rather than the rule. The maximum [MCP](#) and [ODP](#) column count is two. A form’s “master buttons” always appear in the same place in each pane: right-aligned at the bottom edge, regardless of how many or few elements populate the form. These buttons occur *outside any scrollable areas*. If a pane must scroll its content, the master buttons remain persistently visible and fixed.



↑ Figure 56: Form Element Placement within Panes

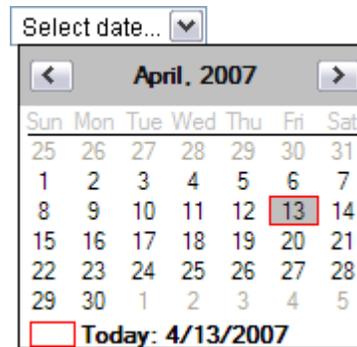
Pane content does **NOT** necessarily have a double gutter as dialog boxes do. In cases where no inner bounding box exists, a single 15-pixel “buffer” pushes all vertical and horizontal content away from the inner edge of the frame. Otherwise, all relative positioning of elements is exactly the same as in dialogs, with the exception that [ODP](#) and [MCP](#) forms can sometimes consist of two columns. Separate these columns by at least 20 pixels. Treat tabs in the [ODP](#) in precisely the same manner as the inner bounding boxes of dialog boxes (i.e., 30 pixels of total padding between the inner window edge and content).



↑ Figure 57: Form Element Spacing in Panes

2.3.4. Special Considerations

2.3.4.1. Date Picker



↑ Figure 58: Date Picker

HECM uses a calendar control developed in-house. It offers additional customization options over the default .NET one. Specifically, it initially displays no date and reads “Select date...,” as required by, for example, Search. It accepts manual input or use of a dropdown-navigable calendar to choose a specific date.

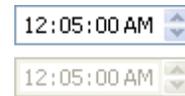
Manual Input

The user can **NOT** directly type in a date. Instead, the user must open the control and choose





2.3.4.2. Time Picker



↑ Figure 59: Time Picker

HECM uses the standard Microsoft .NET clock control. It uses a spinner control to increment or decrement hours, minutes and seconds. The user may optionally jump between the three using horizontal arrow keys, and increase or decrease numbers using the vertical arrow keys. The time picker inherits its format (e.g., a 12- or 24- hour display) from the operating system’s regional and language settings.

2.3.4.3. Required Fields ★

Occasionally, the user must address certain form elements in order to proceed with a given HECM operation. For example, user name and password fields are mandatory in order for the user to log on to the system. The “Required Field” marker appears in any pane that houses mandatory form elements. It is not uncommon for all panes to simultaneously display the marker. The marker image has the “required” text included in the image itself; no additional text is necessary.



↑ Figure 60: Required Field Indicator Key

The icon in the marker aligns vertically with the required icons (★) next to each field in the first column (see the vertical arrow shown in the image below). The marker simultaneously aligns horizontally with the center of the main buttons in the pane (see the

horizontal arrow shown in the image below).



↑ Figure 61: Required Field Marker Alignment

Note: In addition to any other existing validation rules, “Space” and “Tab” key entry in required fields is invalid and will generate an error.

2.3.4.4. Enabled, Disabled or Absent?

What manner of alchemy or voodoo explains when a given control—be it a button, menu option, tab or other element—is visible or invisible, enabled or disabled? The answers to a few questions make it clear:

- **Absent** – Does the user possess sufficient security rights to view it? For example, a regular user will never see a strictly Admin-level control, because it is absent from the application altogether. As a general rule, if the user will **NEVER** have an opportunity under any circumstances to use a given element, *remove it from the interface*.
- **Disabled** – Have all logical preconditions for a certain action been fulfilled? For instance, assuming a user has the appropriate access commands, a “Delete” menu option will activate only when in a content management-oriented module (such as Search or Browse) *and* the user selects a file or folder to manage. Until an object is selected, the “Delete” command remains disabled (i.e., visible, but inactive). Even if a user **RARELY** has an opportunity (even under a single set of circumstances) to use a given element, *include it in the interface*.
- **Enabled** – Whereas security rights and preconditions dictate the appearance and functionality of many elements, others are perpetually enabled, because they **ALWAYS** meet all of the aforementioned criteria. For example, the options in Help are available to any user at any time, without regard to contingencies or security levels. Users can elect to cancel an operation, jump between tabs or cascading menus or exit the system at any time.

2.3.4.5. File Size 📄★

Content file size will be displayed to the user following the below rules:

- Show and round values out to no more than two decimal places, as appropriate.
- If value is a whole number (all values after the decimal are zero), no decimal is necessary.
- If hundredths digit (the second one after the decimal) is zero, show only to tenths (just the first one after the decimal).
- If the value of the tenths digit is zero, but that of the rounded hundredths is 1 – 9, show to hundredths (both digits after the decimal).
- **RIGHT:** 1 MB, 2.5 KB, 5.05 TB
- **WRONG:** 1.00 MB, 2.50 KB or 5.0 TB

Range	Display Format	Abbreviated?	Notes
0 bytes – 999.99 bytes	bytes	No	Use entire lowercase word
1 KB – 999.99 KB	KB	Yes	Stands for “kilobytes”; use uppercase
1 MB – 999.99 MB	MB	Yes	Stands for “megabytes”; use uppercase
1 GB – 999.99 GB	GB	Yes	Stands for “gigabytes”; use uppercase
1 TB – 999.9 TB	TB	Yes	Stands for “terabytes”; use uppercase

2.4. Mouse and Keyboard Input

2.4.1. Mouse

2.4.1.1. Left Click



Left mouse clicks select rows in grids, activate controls and place focus on fields, folders and files, as applicable. Sustained left mouse clicks provide drag-and-drop capability. Shift+ click allows selection of multiple rows in lists of content and/or folders.

2.4.1.2. Right Click



Right mouse clicks give rise to contextual menus for specific relevant operations to a given module in accordance with rules regarding content manipulation, the user’s permissions, etc. These menus include icons and disabled options for unavailable selections, just as the cascading menu does.

2.4.1.3. Double (Left) Click



Double mouse clicks launch the Viewer module for (read-only) viewing of content.

2.4.1.4. Pane Resizing

When the user places the mouse pointer—be it the arrow pointer or text selector, for example—on the vertical pane separator, the pointer changes to a horizontal resizer. In the case of the horizontal pane separator, the pointer changes to a vertical resizer. The user then clicks and drags to the desired position. On the pane control itself, the user sees the arrow pointer, which indicates a clickable action. A single-click on the control expands or collapses, as applicable, according to the direction the control arrow indicates. The controls themselves on the pane separators are non-standard.



↑ Figure 62: Mouse Pointer Reference

2.4.2. Keyboard

Physical impairment, environmental factors, hardware availability and maintenance and a host of other variables affect the user’s input device options. As a matter of principle, the UI team recognizes the importance of keyboard-only access to every facet of the application. Although initial release does **NOT** attain an analogous level of utility and navigability to mouse input, future HECM versions will.

Please note that the following is **NOT** a comprehensive account of all supported Windows standard hotkeys and key combinations, just those deemed most relevant for the majority of key HECM operations.

2.4.2.1. Menu Hotkeys

Each cascading menu patriarch accepts keyboard input to receive focus and highlight the first selection, as denoted by the underlined letter.



↑ Figure 63: Main Cascading Menu (Keyboard Access)

Second- and third-level cascading menu selections also accept keyboard navigation. Once the user chooses a menu, a subsequent letter key press—corresponding to one of the underlined letters in the menu options—shifts selection to that item. Note that the letter assignments *per menu* must be unique, but *the same letter may be used in any or all menus without adverse consequences*, since no more than one cascading menu can ever be activated and in use at the same time.

2.4.2.2. Function Keys



↑ Figure 64: F1 Key

Windows Default: Displays help.
HECM Application: Launches universal HECM help.
States Toggle: No.



↑ Figure 65: F5 Key

Windows Default: Updates (refreshes) the active window.
HECM Application: Refreshes view.
States Toggle: No.



↑ Figure 66: F8 Key

Windows Default: None.
HECM Application: Exits the HECM application to desktop.
States Toggle: No.
Notes: Equivalent to Windows' ALT+F4, which is also supported.



↑ Figure 67: F10 Key

Windows Default: Activates the menu bar in the active program.
HECM Application: Activates the Content Management menu bar.
States Toggle: Yes.



↑ Figure 68: F12 Key

Windows Default: Shows/hides the toolbar in Internet Explorer.
HECM Application: Shows/hides the toolbar in Viewer.
States Toggle: Yes.

2.4.2.3. Tab Key and Tab Order

Specifying a tab order allows users to access items in a logical order. Otherwise, applications generally present the sequence in the order it appears in the source code, which may appear haphazard and difficult to understand. Unless otherwise specified, tab order logically progresses line by line from top to bottom, left to right. From a pane perspective, this equates to the following order: [LSP](#) → [MCP](#) → [ODP](#).

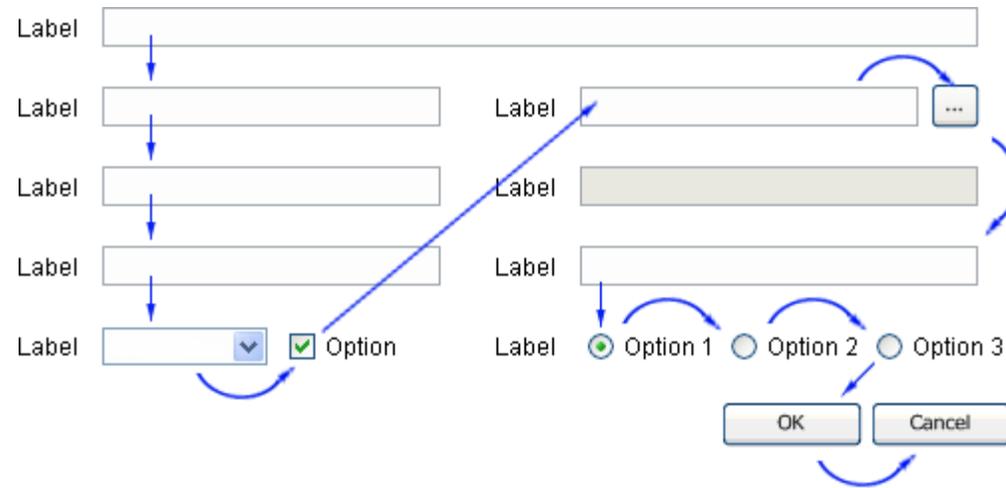


↑ Figure 69: Tab Key

Menus: Cycles vertically through menu selections or horizontally to a child menu.
Fields: Jumps between *editable elements* in a predetermined order dictated by the tab index.
Trees: Shifts focus from tree to next *editable element*, but retains selected directory.
Grids: Moves focus from grid to next *editable element* outside the grid.
Notes: The Shift+Tab key combination reverses the direction of the above actions.

A few notable rules regarding tab order in forms follow:

- Error conditions do **NOT** alter tab order (in other words, tab order remains the same whether field data is erroneous or not).
- Tabbing entirely skips field labels, LSP banner titles and other text, plus “[Required Field](#),” error and other images and disabled form elements, such as read-only fields.
- In two-column scenarios (such as that shown in the image below), the left column completes first row-by-row, then jumps to the top of the right column and proceeds in like manner to the end of the form (consider [jumbo fields](#) part of the left column, though they span).



↑ Figure 70: Form Tab Order Example

Note: spacing is not to scale in the above image to more easily illustrate tab order.

2.4.2.4. Other Keys



↑ Figure 71: U/D Arrow Keys

Menus: Cycle vertically through menu selections in the active menu.
Fields: Expands dropdowns; shifts a row up/down in list boxes, text areas, dropdowns, etc.
Trees: Up selects previous shown item (above); Down selects next shown item (below).
Grids: Jumps between *editable elements* in a column; moves selection one row.
Notes: In a radio button group, Up selects previous, Down selects next



↑ Figure 72: L/R Arrow Keys

Menus: Cycle between top-level menus; expands menus and selects top-most option in each.
Fields: Moves the cursor through text one character forward or backward at a time.
Trees: Left collapses folders; Right expands folders.
Grids: Jumps between *editable elements* in a row.
Notes: In a radio button group, Left selects previous, Right selects next



↑ Figure 73: Spacebar

Menus: No effect.
Fields: Selects/deselects checkboxes.
Trees: No effect.
Grids: No effect.



↑ Figure 74: Delete Key

Menus: No effect.
Fields: Deletes selected contents of a field, but **NOT** the field itself.
Trees: Deletes objects, if the user has sufficient rights, and no system dependencies exist.
Grids: Deletes objects, if the user has sufficient rights, and no system dependencies exist.



↑ Figure 75: Shift+Click

Menus: No effect.
Fields: No effect.
Trees: Select multiple adjacent objects, if the user has sufficient rights and module supports.
Grids: Select multiple adjacent objects, if the user has sufficient rights and module supports.



↑ Figure 76: Control+Click

- Menus:** No effect.
- Fields:** No effect.
- Trees:** Select multiple objects, if the user has sufficient rights and module supports.
- Grids:** Select multiple objects, if the user has sufficient rights and module supports.

2.5. Images

2.5.1. Library

All images reside in StarTeam for interested parties and Development personnel alike. They share a naming convention and remain consistent with the file names listed in this document.

- **Location:** StarTeam: eig\HECM\doc\ProductMgt\User Interface\R1.0\Image Library
- **Hyperlink:** [Image Library](starteam://starteamapp.mckesson.com:49260/158;ns=Project;scheme=id/580;ns=View;scheme=id/6708921;ns=Folder;scheme=id;scope=full/):
starteam://starteamapp.mckesson.com:49260/158;ns=Project;scheme=id/580;ns=View;scheme=id/6708921;ns=Folder;scheme=id;scope=full/

Below is the current list of images used in HECM. Icons with active and inactive states (mostly applicable to the main cascading menu) following the naming convention that active and inactive names are the same except for their suffixes, “-a” and “-i,” respectively. For example, the active state for “open” is “open-a” and the inactive state is “open-i.”

Review the following on a line item-by-line item basis, not by section.

2.5.1.1. Cascading Menu and LSP Banner Icons

Active	Inactive	File Name	Dimensions	Format	Description	In Library	Status
		addfile	16 x 16	PNG	Add File icon in Content Manager and Viewer menus.	✓	
		addurl	16 x 16	PNG	Add URL icon Content Manager menu.	✓	
		lspadmin	16 x 16	PNG	Admin LSP banner icon.	✓	
		lspbrowse	16 x 16	PNG	Browse LSP banner icon and Browse icon in Content Management menu.	✓	
		lspreports	16 x 16	PNG	Report Manager LSP banner icon.	✓	

		lspsearch	16 x 16	PNG	Search LSP banner icon.	✓	
		lspviewer	16 x 16	PNG	Viewer LSP banner icon.	✓	
		lspworkflow	16 x 16	PNG	Workflow LSP banner icon.	✓	
		checkin	16 x 16	PNG	Check In icon in Content Manager menu.	✓	
		checkout	16 x 16	PNG	Check Out icon in Content Manager menu.	✓	
		checkundo	16 x 16	PNG	Undo Checkout icon in Content Manager menu.	✓	
		comments	16 x 16	PNG	View Comments icon in Content Manager menu.	✓	
		configure	16 x 16	PNG	Admin > Configure menu and Admin LSP banner icon.	✓	
		content	16 x 16	PNG	Manage Content icon in Admin > Monitor and Workflow menus.	✓	
		contentlink	16 x 16	PNG	Manage Content > Link icon for the Workflow menu.	✓	
		contentloader	16 x 16	PNG	User Reports > Content Loader menus.	✓	
		contenttypes	16 x 16	PNG	Configure Content Types in Admin > Configure > Domain App Builder menu.	✓	
		contentunlink	16 x 16	PNG	Manage Content > Unlink icon for the Workflow menu.	✓	
		delete	16 x 16	PNG	Delete icon in Content Manager and Workflow menus.	✓	
		docgoto	16 x 16	PNG	Go to... document icon in Viewer menu.	✓	
		docnext	16 x 16	PNG	Go to next document icon in Viewer menu.	✓	
		docprev	16 x 16	PNG	Go to previous document icon in Viewer menu.	✓	
		domainappbldr	16 x 16	PNG	Domain App Builder in Admin > Configure menu.	✓	
		domainfields	16 x 16	PNG	Configure Metadata Fields in Admin > Configure > Domain App Builder menu.	✓	
		domainfolders	16 x 16	PNG	Configure Folders icon in Admin > Configure > Domain App Builder menu.	✓	
		domains	16 x 16	PNG	Configure Domains in Admin > Configure > Domain App Builder menu.	✓	
		domaintemplates	16 x 16	PNG	Configure Metadata Templates in Admin > Configure > Domain App Builder menu.	✓	
		edit	16 x 16	PNG	Edit icon in Content Manager and Viewer menus.	✓	
		email	16 x 16	PNG	Email Report icon in Report Manager menu.	✓	
		exit	16 x 16	PNG	Exit icon in Content Manager and Viewer menus.	✓	
		find	16 x 16	PNG	Edit > Find icon in Viewer and Report Manager menus.	✓	

		font	16 x 16	PNG	Set Font in Viewer menu.	✓	
		goto	16 x 16	PNG	Edit > Go to icon for the Viewer menu.	✓	
		help	16 x 16	PNG	HECM Help in Help menu.	✓	
		helpabout	16 x 16	PNG	About HECM icon in Help menu.	✓	
		helpsupport	16 x 16	PNG	Support icon in Help menu.	✓	
		helpupdate	16 x 16	PNG	Updates icon in Help menu.	✓	
		logoff	16 x 16	PNG	View Signatures icon in Content Manager menu.	✓	
		logoffauto	16 x 16	PNG	Admin > User Settings > Configure Auto logoff menu.	✓	
		log	16 x 16	PNG	Admin > Log menu	✓	
		logsconfig	16 x 16	PNG	Configure Logs icon in Administration menu.	✓	
		mailserver	16 x 16	PNG	Admin > Configure > Mail Server	✓	
		metadata	16 x 16	PNG	View Metadata icon in Content Manager menu.	✓	
		monitor	16 x 16	PNG	Admin > Monitor menu	✓	
		new	16 x 16	PNG	New... icon in Content Manager and Workflow menus.	✓	
		open	16 x 16	PNG	File Open icon in Content Manager and Workflow menus.	✓	
		pagefirst	16 x 16	PNG	Go to first page icon in Viewer menu.	✓	
		pagegoto	16 x 16	PNG	Go to... page icon in Viewer menu.	✓	
		pagelast	16 x 16	PNG	Go to last page icon in Viewer menu.	✓	
		pagenext	16 x 16	PNG	Go to next page icon in Viewer menu.	✓	
		pageprev	16 x 16	PNG	Go to previous page icon in Viewer menu.	✓	
		print	16 x 16	PNG	Workflow > Manage Tasks/Worklists > Print/Report Manager > Print Report menus.	✓	
		printlocal	16 x 16	PNG	File > Local Print icon in Viewer menu.	✓	
		printpreview	16 x 16	PNG	File > Print Preview icon in Report Manager and Viewer menus.	✓	
		properties	16 x 16	PNG	View Properties icon in Content Manager menu.	✓	
		pwdreset	16 x 16	PNG	Reset Password icon in Admin > Configure menu.	✓	
		pwdpolicies	16 x 16	PNG	Password Policies icon in Admin > Configure > Security and Passwords menu.	✓	

		reportadmin	16 x 16	PNG	Run Admin Reports icon in Report Manager menu.	✓	
		reportaudit	16 x 16	PNG	Run Admin Reports > Audit Report icon in Report Manager menu.	✓	
		reportugrm	16 x 16	PNG	Run Admin Reports > Users, Groups & Roles Matrix Report menu.	✓	
		reportuser	16 x 16	PNG	Run User Reports icon in Report Manager menu.	✓	
		reportuam	16 x 16	PNG	Run Admin Reports > User Account Maintenance Report menu	✓	
		security	16 x 16	PNG	Security and Passwords icon in Admin > Configure menu.	✓	
		signature	16 x 16	PNG	View Signatures icon in Content Manager and Viewer > Sign menus.	✓	
		task	16 x 16	PNG	Manage Tasks icon in Workflow menu.	✓	
		taskcomplete	16 x 16	PNG	Manage Tasks > Complete icon in Workflow menu.	✓	
		taskreassign	16 x 16	PNG	Manage Tasks > Reassign icon in Workflow menu.	✓	
		ugar	16 x 16	PNG	Users, Groups, ACLs & Roles icon in Administration > Configure menu.	✓	
		ugaraccls	16 x 16	PNG	Configure ACLs icon in Administration > Configure > UGAR menu.	✓	
		ugargroups	16 x 16	PNG	Groups icon in Admin > Configure > UGAR menu.	✓	
		ugarroles	16 x 16	PNG	Configure Roles icon in Admin > Configure > Users, Groups, ACLs and Roles menu.	✓	
		ugarusers	16 x 16	PNG	Users icon in Admin > Configure > Users, Groups, ACLs & Roles menu.	✓	
		usersettings	16 x 16	PNG	User Settings icon in Admin menu.	✓	
		view	16 x 16	PNG	View icon in Content Manager, Viewer and Workflow menus.	✓	
		viewactualsize	16 x 16	PNG	Actual Size icon in Viewer > View > Fit (Image) menu.	✓	
		viewbook	16 x 16	PNG	Bookview icon in Viewer menu.	✓	
		viewfit	16 x 16	PNG	Fit (Image) icon in Viewer > View > Fit (Image) menu.	✓	
		viewfitbest	16 x 16	PNG	Best Fit icon in Viewer > View > Fit (Image) menu.	✓	
		viewfitheight	16 x 16	PNG	Fit Height icon in Viewer > View > Fit (Image) menu.	✓	
		viewfitwidth	16 x 16	PNG	Fit Width icon in Viewe > View > Fit (Image) menu.	✓	
		viewflip	16 x 16	PNG	Flip icon in Viewer > View > Flip menu.	✓	
		viewfliph	16 x 16	PNG	Flip Horizontal icon in Viewer > View > Flip menu.	✓	
		viewflipv	16 x 16	PNG	Flip Vertical icon in Viewer menu.	✓	

		viewrotate	16 x 16	PNG	Rotate icon in Viewer > View > Rotate menu.	✓	
		viewrotatedefault	16 x 16	PNG	Default Orientation icon in Viewer > View > Rotate menu.	✓	
		viewrotateleft	16 x 16	PNG	Rotate Left icon in Viewer > View > Rotate menu.	✓	
		viewrotateright	16 x 16	PNG	Rotate Right icon in Viewer > View > Rotate menu.	✓	
		viewtoolbar	16 x 16	PNG	Hide/Show Toolbar icon in Viewer > View menu.	✓	
		viewzoom	16 x 16	PNG	Zoom icon in Viewer > View > Zoom menu.	✓	
		viewzoomabs	16 x 16	PNG	Absolute Zoom In icon in Viewer > View > Zoom toolbar.	✓	
		viewzoomin	16 x 16	PNG	Zoom In icon in Viewer > View > Zoom menu.	✓	
		viewzoomout	16 x 16	PNG	Zoom Out icon in Viewer > View > Zoom menu.	✓	
		viewzoomrb	16 x 16	PNG	Rubberband Zoom icon in Viewer > View > Zoom menu.	✓	
		worklist	16 x 16	PNG	Manage Worklists icon in Workflow and Administration > Configure > Worklists menus.	✓	

2.5.1.2. Messaging Icons ★

Note: Images in this section do not have inactive states.

Image	File Name	Dimensions	Format	Reference	Description	In Library	Status
	msg-admin-alert	72 x 72	PNG	BID	Admin alert dialog/message icon.	✓	★
	msg-admin-default	72 x 72	PNG	BID	Content Manager task dialog/message icon.	✓	★
	msg-admin-error	72 x 72	PNG	BID	Admin error dialog/message icon.	✓	★

	msg-admin-info	72 x 72	PNG	BID	Admin information dialog/message icon.	✓	★
	msg-admin-success	72 x 72	PNG	BID	Admin success dialog/message icon.	✓	★
	msg-cm-alert	72 x 72	PNG	BID	CM (Browse/Search) alert dialog/message icon.	✓	★
	msg-cm-default	72 x 72	PNG	BID	CM (Browse/Search) default dialog/message icon.	✓	★
	msg-cm-error	72 x 72	PNG	BID	CM (Browse/Search) error dialog/message icon.	✓	★
	msg-cm-info	72 x 72	PNG	BID	CM (Browse/Search) info dialog/message icon.	✓	★
	msg-cm-success	72 x 72	PNG	BID	CM (Browse/Search) success dialog/message icon.	✓	★

	msg-help-alert	72 x 72	PNG	BID	Help alert dialog/message icon.	✓	★
	msg-help-default	72 x 72	PNG	BID	Help default dialog/message icon.	✓	★
	msg-help-error	72 x 72	PNG	BID	Help error dialog/message icon.	✓	★
	msg-help-info	72 x 72	PNG	BID	Help information dialog/message icon.	✓	★
	msg-help-success	72 x 72	PNG	BID	Help success dialog/message icon.	✓	★
	msg-log-alert	72 x 72	PNG	BID	Log alert dialog/message icon.	✓	★
	msg-log-default	72 x 72	PNG	BID	Log default dialog/message icon.	✓	★

	msg-log-error	72 x 72	PNG	BID	Log error dialog/message icon.	✓	★
	msg-log-info	72 x 72	PNG	BID	Log information dialog/message icon.	✓	★
	msg-log-success	72 x 72	PNG	BID	Log success dialog/message icon.	✓	★
	msg-rpt-alert	72 x 72	PNG	BID	Report Manager alert dialog/message icon.	✓	★
	msg-rpt-default	72 x 72	PNG	BID	Report Manager default dialog/message icon.	✓	★
	msg-rpt-error	72 x 72	PNG	BID	Report Manager error dialog/message icon.	✓	★
	msg-rpt-info	72 x 72	PNG	BID	Report Manager information dialog/message icon.	✓	★

	msg-rpt-success	72 x 72	PNG	BID	Report Manager information dialog/message icon.	✓	★
	msg-sec-alert	72 x 72	PNG	BID124961	Security alert dialog/message icon.	✓	★
	msg-sec-default	72 x 72	PNG	BID124961	Security default dialog/message icon.	✓	★
	msg-sec-error	72 x 72	PNG	BID124961	Security error dialog/message icon.	✓	★
	msg-sec-info	72 x 72	PNG	BID124961	Security information dialog/message icon.	✓	★
	msg-sec-success	72 x 72	PNG	BID124962	Security success dialog/message icon.	✓	★
	msg-vwr-alert	72 x 72	PNG	BID	Viewer alert dialog/message icon.	✓	★

	msg-vwr-default	72 x 72	PNG	BID	Viewer default dialog/message icon.	✓	★
	msg-vwr-error	72 x 72	PNG	BID	Viewer error dialog/message icon.	✓	★
	msg-vwr-info	72 x 72	PNG	BID	Viewer information dialog/message icon.	✓	★
	msg-vwr-success	72 x 72	PNG	BID	Viewer success dialog/message icon.	✓	★
	msg-wrk-alert	72 x 72	PNG	BID	Workflow alert dialog/message icon.	✓	★
	msg-wrk-default	72 x 72	PNG	BID	Workflow default dialog/message icon.	✓	★
	msg-wrk-error	72 x 72	PNG	BID	Workflow error dialog/message icon.	✓	★

	msg-wrk-info	72 x 72	PNG	BID	Workflow information dialog/message icon.	✓	★
	msg-wrk-success	72 x 72	PNG	BID	Workflow success dialog/message icon.	✓	★

2.5.1.3. Button Bar/Toolbar Icons ★

Note: Most button bar icons are the same active/inactive files as their cascading menu counterparts. The table below shows those that differ or do **NOT** have equivalent icons in the cascading menu.

Active	Inactive	File Name	Dimensions	Format	Description	In Library	Status
		contentbin	23 x 16	PNG	Content Bin icon	✓	★
		dropzone	23 x 16	PNG	Drop Zone icon	✓	★

2.5.1.4. Other Application Icons

The following icons are listed in no particular order.

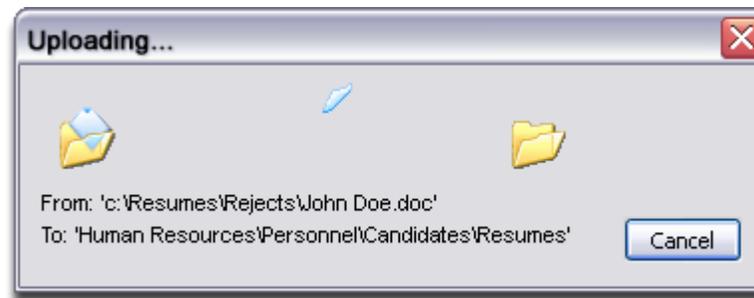
Active	Inactive	File Name	Dimensions	Format	Reference	Description	In Library	Status
		asterisk	8 x 7	PNG	Style Guide	Required field indicator	✓	
		domain	16 x 16	PNG	Style Guide	BCT domain indicator	✓	
		configuration	16 x 16	PNG	Style Guide	Generic configuration icon	✓	
		clipboard	16 x 16	PNG	Style Guide	Clipboard icon	✓	
		clipboardadd	16 x 16	PNG	Style Guide	Add to Clipboard icon in Content Manager menu.	✓	
		clipboardclear	16 x 16	PNG	Style Guide	Clear Clipboard icon in Content Manager menu.	✓	
		ugaracl2roles	16 x 16	PNG	Style Guide	Assign ACLs to Roles	✓	

		ugarug2roles	16 x 16	PNG	Style Guide	Assign User/Groups to Roles	✓	
		viewdragscroll	16 x 16	PNG	Style Guide	Drag-scroll icon in Viewer > View > Flip menu.	✓	
		taskprocess	16 x 16	PNG	Style Guide	Manage Tasks > Process icon in Workflow menu.	✓	
		reportcmr	16 x 16	PNG	Style Guide	CM Report icon in RM > Run Admin Reports menu.	✓	
	N/A	diagram	10 x 10	PNG	Style Guide	Results grid content type indicator		
	N/A	document	10 x 10	PNG	Style Guide	Results grid content type indicator		
	N/A	image	10 x 10	PNG	Style Guide	Results grid content type indicator		
	N/A	presentation	10 x 10	PNG	Style Guide	Results grid content type indicator		
	= required	required	8 x 7	PNG	BID123843	Required field indicator key	✓	
	N/A	spreadsheet	10 x 10	PNG	Style Guide	Results grid content type indicator		
	N/A	text	10 x 10	PNG	Style Guide	Results grid content type indicator		
	N/A	unknown	10 x 10	PNG	Style Guide	Results grid content type indicator		
	N/A	webpage	10 x 10	PNG	Style Guide	Results grid content type indicator		
		locksm	8 x 11	PNG	Style Guide	Results grid file status indicator (locked or unlocked)	✓	
	N/A	yes	9 x 8	PNG	Style Guide	Results grid positive state indicator	✓	
	N/A	no	9 x 8	PNG	Style Guide	Results grid negative state indicator	✓	

2.5.2. Special Cases

2.5.2.1. Animation

Animation is currently only slated for implementation regarding long file manipulation operations, such as moving within, or adding to, HECM (see image below). In general, if a situation arises that warrants the use of animation, limit animation to two instances per screen, preferably one.



↑ Figure 77: File Transfer Window Animation Example

2.5.2.2. Logos

There is presently no direction on logo use. If a McKesson corporate or product logo is employed, please refer to corporate standards regarding their appropriate and approved use.

2.6. System Messaging

2.6.1. Types

Note: Example images below show only the “message type indicator” that appears superimposed over the module. Various application components have their own distinct icons (e.g., a lock for Security, a computer display for “Browse”). The icons apply only to messaging in dialog boxes, though the descriptions of message types hold for messaging within the main application window as well.

2.6.1.1. Alert



The Alert is used when the system warns of some serious or negative consequences of the user’s or system’s (in)action, *excluding errors*. It is employed when the user must know and *mandatorily* act upon a serious *non-error* condition. The modal dialog box often requires confirmation before proceeding and is phrased in the interrogatory. An example would be a dialog asking the user “are you sure you want to delete this very important item that will affect all users?”

2.6.1.2. Default 

No corner icon is used.

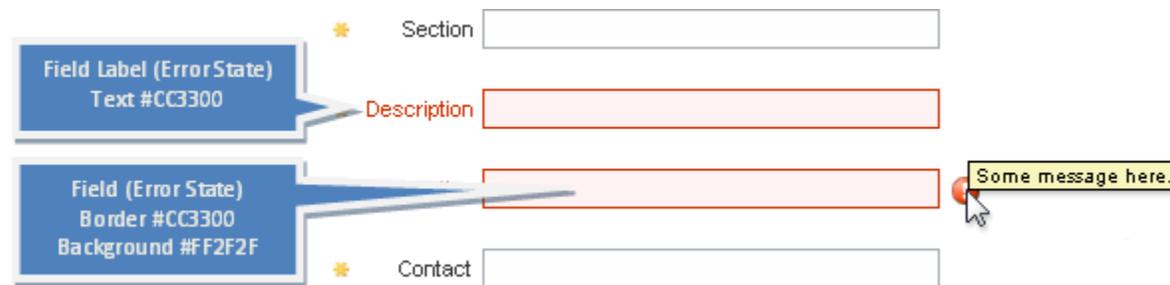
The Default icon/message combination indicates an “at rest” or an *a priori* state, in which none of the other message categories apply. For example, a logon dialog in the absence of any errors, alerts or informational dialogs would be considered “default,” because no adverse effects have yet been encountered.

2.6.1.3. Error



HECM uses a somewhat configurable, “plug-and-play” Microsoft .NET error messaging solution for errors system-wide: in dialog boxes and all the panes. The Error message is self-evident: the system warns of some negative consequences of the user’s or system’s (in)action or other problems, such as transfer failures, unsupported types, invalid data or incorrect credentials. These messages often suggest specific solution(s). Like an Alert, the user must *mandatorily* act upon the information, because some chain of events has been interrupted. The user must directly intervene and comply fully before continuing.

Note: Disable the blinking icon feature. Customize field and label colors as shown. Tooltip includes specific message.



↑ Figure 78: HECM Error Handling

2.6.1.4. Info 



The Info message is usually positive or neutral feedback, statements, tips, hints or directions regarding an operation the user simply acknowledges (such as clicking “OK”) or can *optionally* undertake (“Your password expires in x days. Do you want to change your password now?” In this case, the user may choose “Change Password” or “Skip”). The system

reports a status (or change of status) in a declaratory “FYI” fashion and may phrase voluntary operations as a question.

2.6.1.5. *Success*



The Success message can be considered a special type of Info message. It provides the user positive feedback regarding an event, especially one that immediately impacts system or personal settings or some aspect of how the user interacts with the program. The user simply acknowledges (such as clicking “OK” after a “Something successfully happened”).

2.6.2. Inventory ★

- 📄 Review the following on a line item-by-line item basis, not by section.
- 📄 Due to the amount of BIDs being sent out for review, we are highlighting the messages that pertain only to those BIDs in different colors to aid with reviewing messages.
 1. We’ve also added another column with the BID Name to aid in finding/matching messages with BIDs
 2. Here is a table a mapping of highlighted colors to BID
 3. Kudos to Jordan for this helpful tidbit:
 - To search for a particular mapping, launch the find (**Ctrl+F**) and in the find what enter **^g** and then the letter following with no space.
 - For example, **^ga** will bring up Admin Manage Workflow Worklist, and **^gb** will bring up User: Manage Task

Bid(s)	BID Name	Highlighted Background Color
124952	Configure Domain	Light Blue ★d
124951	Configure Content Loader & Configure Content Type	Purple ★f
123840	Browse	Bright Pink ★g
123842	Search	Muted Red ★h
123841	Review Content	Bright Orange ★i
159113	Drop Zone	Light Orange ★j
124877	Viewer	Yellow Green ★k
124958	List/View Log Files	Green ★l

2.6.2.1. Alerts

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID125603	Configure ACLs	A004	Are you sure you want to delete the selected ACL?	Alert Message	
BID125602	Configure Roles	A009	Are you sure you want to delete the selected role?	Alert Message	
BID125602	Configure Roles	A011	Are you sure you want to remove this role from the selected group?	Alert Message	
BID125602	Configure Roles	A012	Are you sure you want to remove this role from the selected user?	Alert Message	
BID125600	Configure Groups	A015	Are you sure you want to delete the selected group?	Alert Message	
BID125600	Configure Groups	A016	Are you sure you want to remove this group from the selected role?	Alert Message	
BID125600	Configure Groups	A017	Are you sure you want to remove this user from the selected group?	Alert Message	
BID125602	Configure Roles	A019	Are you sure you want to remove this ACL from the selected role?	Alert Message	
BID125603	Configure ACLs	A020	Are you sure you want to remove this role from the selected ACL?	Alert Message	
BID124951	Configure Content Loader & Content Type	A028	Are you sure you want to delete the selected content type?	Alert Message	f
BID124951	Configure Content Loader & Content Type	A029	The content type selected has associated content and cannot be deleted. If this template should no longer be used, uncheck "Active" in the general tab so it will no longer be available for new content.	Alert Message	f
BID124951	Configure Content Loader & Content Type	A032	Are you sure you want to remove the selected loader rule from this content type?	Alert Message	f
BID124952	Configure Domains	A036	Deleting a domain will delete all associated domain configuration settings and content associated to that domain. Are you sure you want to delete this domain?	Alert Message	d
BID		AW01	Would you like to save your work before switching domains?	Alert Message	
BID124976	Admin: Manage workflow worklist	AW07	Are you sure you want to delete the selected worklist(s)?	Alert Message	a
BID124976	Admin: Manage workflow worklist	AW08	The selected Worklist(s) contain tasks and could not be deleted.	Alert Message	a
BID124976	Admin: Manage workflow worklist	AW09	Worklists that contain tasks could not be deleted. Only the empty worklists have been deleted.	Alert Message	a

		AW05	You have unsaved changes. Would you like to save changes before refreshing?	Alert Message	
		UW09?	Are you sure you want to unlink the selected content?	Alert Message	
BID124977	User: Manage Task	UW13	The selected content could not be accessed because you do not have the appropriate security rights.	Alert Message	
BID124977	User: Manage Task	UW14	Are you sure you want to unlink content from this task?	Alert Message	
BID123843	Submit Content	C001	A file by that name already exists. Please rename and submit again.	Alert Message	
BID123843	Submit Content	C002	A URL by that name already exists. Use another name or save again to have the system uniquely auto-append the name.	Alert Message	
BID123843	Submit Content	C003	The URL or URL name is invalid.	Alert Message	
BID124961	Logon User	S005	Your password has expired. Please create a new one now.	Alert Message	
BID159113	Drop Zone	C006	You do not have security rights to access content in the destination folder determined by the content loader. Do you wish to continue adding content to this folder?	Alert Message	j
BID159113	Drop Zone	C008	The file name your are adding already exists in the destination folder. Change the name and add the file again.	Alert Message	j
BID124962	Configure/Reset Password	S020	To reset your password, correctly answer the following security questions.	Alert Message	
BID124962	Configure/Reset Password	S021	Choose a new password and enter it in both fields below.	Alert Message	
BID124964	Configure security policies	S025	Your auto logoff duration is longer than the global duration set by the Admin. A duration of <n> minutes will be used.	Alert Message	
BID124965	Configure security policies	S052	The system will not save work in progress. Are you sure you want to log off?	Alert Message	
BID124965	Configure security policies	S053	The system will not save work in progress. Are you sure you want to exit?	Alert Message	
BID124977	User: Manage Task	UW08	Are you sure you want to delete the selected task(s)?	Alert Message	
BID			This file has been checked out by another user and will be opened in read-only mode.	Alert Message	
BID			Are you sure you want to delete this content and all of its versions?	Alert Message	

BID			Are you sure you want to delete the selected version(s) of this content?	Alert Message	
BID			Deleting this metadata field will delete it from any templates that reference it. All associated metadata values will also be deleted. Are you sure you want to delete this field?	Alert Message	
BID			Would you like to save your work before switching domains?	Alert Message	
BID			Deleting this template will delete the template's association to the folder, search and check-in screens. Are you sure you want to delete this template?	Alert Message	
BID			Deleting a domain will delete all associated domain configuration settings and content associated to that domain. Are you sure you want to delete this domain?	Alert Message	
BID123843	Submit Content	X001	Multiple file operations not supported.	Alert Message	
BID1123841	Review Content	RC01	Are you sure you want to delete the selected comment?	Alert Message	 i
BID1123841	Review Content	RC02	Are you have not applied your new comment are you sure you wish to continue?	Alert Message	 i
BID1123841	Review Content	RC10	Are you sure you want to delete the content(s) and all its versions?	Alert Message	 i
BID1123841	Review Content	RC11	Are you sure you want to delete the selected version(s) of this content?	Alert Message	 i
BID1123841	Review Content	RC03	Content may only be checked out by one user and the selected content is already checked out.	Alert Message	 i
BID1123841	Review Content	RC04	Some of the selected content is already checked out and cannot be checked out. Only the content(s) you can check out have been checked out.	Alert Message	 i
BID1123841	Review Content	RC05	Content may only be unchecked out by the user who has checked it out.	Alert Message	 i
BID1123841	Review Content	RC06	Some of the selected content is checked out by another user and cannot be unchecked out. Only the content you can check out have been unchecked out.	Alert Message	 i
BID1123841	Review Content	RC07	Content may only be edited by the user who has checked it out.	Alert Message	 i

BID1123841	Review Content	RC08	Some of the selected content is checked out by another user and cannot be edited. Only the content(s) you have checked out will display to edit.	Alert Message	 i
BID1123841	Review Content	RC09	Content may only be checked in by the user who has checked it out.	Alert Message	 i



2.6.2.2. Default

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID124965	Logoff User	S010	The system logged you off due to user inactivity.	Default Message	
BID124961	Logon User	S051	Enter user ID and password to log on.	Default Message	

2.6.2.3. Errors

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID125603	Configure ACLs	A005	An ACL with the same name already exists. Use another name or save again to have the system uniquely auto-append the name.	Error Message	
BID125602	Configure Roles	A010	A role with the same name already exists. Use another name or save again to have the system uniquely auto-append the name.	Error Message	
BID125600	Configure Groups	A018	A group with the same name already exists. Use another name or save again to have the system uniquely auto-append the name.	Error Message	
BID124966	Configure users	A022	Missing, unselected or invalid value.	Error Message	
BID124966	Configure users	A025	User ID is already in use. Please choose another.	Error Message	
BID124951	Configure Content Loader & Content Type	A030	A content type with the same name already exists. Use another name or save again to have the system uniquely auto-append the name.	Error Message	 f
BID124952	Configure Domains	A035	A domain with the same name already exists. Use another name or save again to have the system uniquely auto-append the name.	Error Message	 d
124957	Configure Logs	S055	The value in this field must be a positive whole number (that is, zero or greater than zero).	Inline-error	

BID124976	Admin: Manage workflow worklist	AWE1	Worklist name is already in use. Please choose another name.	Error Message	
BID124961	Logon User	S001	The system could not log you on. Please ensure a correct user name and password.	Error Message	
BID124961	Logon User	S002	Your account is locked. Please reset your password by the “Unlock Account” button below or contact your administrator.	Error Message	
BID124961	Logon User	S008	The provided value cannot contain more than <n> characters.	Error Message: The value of <n> will be determined from the variable's length definition.	
System-wide		S015	The entered value is invalid. It may be of the wrong data type or fails to meet the length requirement.	Error Message	
BID124964	Configure security policies	S016	The entered value is out of range. Please choose a number within the acceptable limits.	Error Message	
BID124964	Configure security policies	S017	The minimum number of required special characters exceeds the maximum password length.	Error Message	
BID124964	Configure security policies	S018	The minimum length exceeds the maximum password length.	Error Message	
BID124962	Configure/Reset Password	S022	Security answer(s) incorrect. Please try again. <n> attempt(s) remain.	Error Message: The value of <n> starts at three (3) and decrements by one until zero (0), then issues S023.	
BID124962	Configure/Reset Password	S023	This account has been locked. You must contact an administrator to gain access.	Error Message	
BID124963	Change Password	S030	There was an error in creating your new password. The following must be corrected before your password can be changed:	Error Message	
BID124963	Change Password	S030a	The old password is incorrect.	Error Message	
BID124963	Change Password	S030b	The new password and confirmation password do not match.	Error Message	
BID124963	Change Password	S030c	Passwords must contain <MinLength> to <MaxLength> characters.	Error Message	

BID124963	Change Password	S030d	Passwords must contain at least <PasswordComplexityTest> of each: uppercase, lowercase, numeric and symbol characters.	Error Message: This message must show only those complexity test parameters that have been selected on configuration password policies screen.	
BID124963	Change Password	S030e	The proposed new password too closely resembles an old one. Please enter a different password.	Error Message	
BID124963	Change Password	S030f	The password and user ID cannot be the same.	Error Message	
BID124964	Configure Security Policies	S054	The minimum number of required special characters exceeds the number of special characters checked above.	Error Message	
BID123751	Configure Mail Server	A038	IP invalid. Acceptable format is four groups of three digits max, separated by dots. For example 255.255.255.255.	Tooltip - Error	
BID124877	Viewer	V001	This content is unable to display, because a registered viewer/player cannot be found.	Error Message	 k
BID			Content with the same name already exists in this folder. Please change the name before submitting the content.	Error Message	
BID			Try more general keywords.	Error Message – Tooltip	
BID			Please ensure that all words are spelled correctly.	Error Message – Tooltip	
BID			Try different keywords or keyword combinations.	Error Message – Tooltip	

2.6.2.4. Tooltips

Bid(s)	BID Name	Code	Message	Type / Notes	Status
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BID165107	Ext_Userand Groups_Worklist	A038	Save group changes.	Tooltip	
BID165107	Ext_Userand Groups_Worklist	A039	Save changes and create a new group.	Tooltip	
BID165107	Ext_Userand Groups_Worklist	A040	Cancel group changes.	Tooltip	
BID165107	Ext_Userand Groups_Worklist	A041	Save user changes.	Tooltip	
BID165107	Ext_Userand Groups_Worklist	A042	Save changes and create a new user.	Tooltip	
BID165107	Ext_Userand Groups_Worklist	A043	Cancel user changes.	Tooltip	
BID124976	Admin: Manage workflow worklist	AWT01	Save worklist changes.	Tooltip	
BID124976	Admin: Manage workflow worklist	AWT02	Save changes and create a new worklist.	Tooltip	
BID124976	Admin: Manage workflow worklist	AWT03	Cancel worklist changes.	Tooltip	
BID		AWT04	Save changes before switching domains.	Tooltip	
BID		AWT05	Do not save changes before switching domains.	Tooltip	
BID124976	Admin: Manage workflow worklist	AWT06	Create a new worklist.	Tooltip	
BID124976	Admin: Manage workflow worklist	AWT07	Delete selected worklist(s).	Tooltip	
BID124976	Admin: Manage workflow worklist	AWT08	Do not delete the selected worklist(s).	Tooltip	
BID124977	User: Manage Task	UWT06	Refresh worklists.	Tooltip	
BID124977	User: Manage Task	UWT20	Own task(s) to reassign or complete.	Tooltip	
BID124977	User: Manage Task	UWT21	Return task(s) to the worklist to allow ownership by another.	Tooltip	
BID124977	User: Manage Task	UWT23	Complete the task(s).	Tooltip	

BID124977	User: Manage Task	UWT24	Delete selected task(s).	Tooltip	
BID124977	User: Manage Task	UWT25	Don't delete tasks(s).	Tooltip	
BID124977	User: Manage Task	UWT22	Reassign task(s) to another worklist.	Tooltip	
BID124977	User: Manage Task	UWT18	Create a new task for the selected worklist.	Tooltip	
BID124977	User: Manage Task	UWT03	Edit task(s) that have been released to a worklist.	Tooltip	
BID124977	User: Manage Task	UWT04	Release task(s) for access by other users.	Tooltip	
BID124977	User: Manage Task	UWT05	Browse worklists to reassign task(s).	Tooltip	
BID124977	User: Manage Task	UWT07	Cancel task changes.	Tooltip	
BID124977	User: Manage Task	UWT08	Reassign task(s) to the selected worklist.	Tooltip	
BID124977	User: Manage Task	UWT26	Assign task to the selected worklist.	Tooltip	
BID124977	User: Manage Task	UWT09	Cancel reassign.	Tooltip	
BID124977	User: Manage Task	UWT10	Add content bin link(s) to this task.	Tooltip	
BID124977	User: Manage Task	UWT11	Remove selected linked content from this task.	Tooltip	
BID124977	User: Manage Task	UWT12	Don't remove selected linked content from this task.	Tooltip	
BID124977	User: Manage Task	UWT14	Save task as a draft. No other users will see the task while it is in draft status.	Tooltip	
BID124977	User: Manage Task	UWT15	Save task and release to the worklist allowing users to work on the task.	Tooltip	
BID124977	User: Manage Task	UWT19	Create a new task for this worklist.	Tooltip	
BID124977	User: Manage Task	TB01	Store links from selected content to attach to a task.	Tooltip	
BID123841	Review Content	RCT01	Delete selected comment.	Tooltip	 i
BID123841	Review Content	RCT02	Don't delete comment.	Tooltip	 i
BID123841	Review Content	RCT03	Save and apply the comment to the content version.	Tooltip	 i
BID123841	Review Content	RCT04	Do not save the comment.	Tooltip	 i
BID123841	Review Content	RCT05	Delete the selected content(s).	Tooltip	 i
BID123841	Review Content	RCT06	Don't delete the selected content(s).	Tooltip	 i

BID123841	Review Content	RCT07	Delete the selected content version(s).	Tooltip	★ _i
BID123841	Review Content	RCT08	Don't delete the selected content version(s).	Tooltip	★ _i
BID123841	Review Content	RCT09	Check in the content with any updates to the metadata.	Tooltip	★ _i
BID123841	Review Content	RCT10	Do not check in the content and disregard any updates to the metadata.	Tooltip	★ _i
BID123841	Review Content	RCT11	Return to search results.	Tooltip	★ _i
BID123841	Review Content	RCT12	Return to browse folder.	Tooltip	★ _i
BID123841	Review Content	RCT13	Create a new comment for the selected content version.	Tooltip	★ _i
BID123841	Review Content	RCT14	Save the entered comment.	Tooltip	★ _i
BID123841	Review Content	RCT15	Delete the selected comment.	Tooltip	★ _i
BID123841	Review Content	RCT16	Save changes made to the metadata fields.	Tooltip	★ _i
BID123841	Review Content	RCT17	Cancel any changes and reset the metadata fields to the last saved state.	Tooltip	★ _i
BID124597	Configure Logs	A046	Save log changes.	Tooltip	🔒
BID124597	Configure Logs	A047	Cancel log changes.	Tooltip	🔒
BID124597	Configure Logs	A048	Browse for log location.	Tooltip	🔒
BID123842	Search	F008	Choose a template from a list.	Tooltip	★ _h
BID123842	Search	F009	Choose a user from a list.	Tooltip	★ _h
BID123842	Search	F010	Submit criteria to start search.	Tooltip	★ _h
BID123842	Search	F011	Clear search form and revert to default settings.	Tooltip	★ _h
BID123842	Search	F012	Choose the highlighted user.	Tooltip	★ _h
BID123842	Search	F013	Discard selection and quit user look-up operation.	Tooltip	★ _h
BID123842	Search	F014	Choose highlighted template.	Tooltip	★ _h
BID123842	Search	F015	Discard selection and quit template look-up operation.	Tooltip	★ _h
BID124877	Viewer	V025	Rescale view.	Tooltip	★ _k
BID124877	Viewer	V004	Rescale view to accommodate entire width.	Tooltip	★ _k

BID124877	Viewer	V005	Rescale view to accommodate entire height.	Tooltip	★ _k
BID124877	Viewer	V006	Rescale view to accommodate entire width and height.	Tooltip	★ _k
BID124877	Viewer	V007	Reset view to native dimensions.	Tooltip	★ _k
BID124877	Viewer	V008	Configure font attributes.	Tooltip	★ _k
BID124877	Viewer	V009	Flip view top to bottom.	Tooltip	★ _k
BID124877	Viewer	V010	Flip view side to side.	Tooltip	★ _k
BID124877	Viewer	V011	Reorient view 90 degrees to the right.	Tooltip	★ _k
BID124877	Viewer	V012	Reorient view 90 degrees to the left.	Tooltip	★ _k
BID124877	Viewer	V013	Rescale view to accommodate two side-by-side pages.	Tooltip	★ _k
BID124877	Viewer	V014	Sign selected content.	Tooltip	★ _k
BID124877	Viewer	V015	Print selected content.	Tooltip	★ _k
BID124877	Viewer	V016	Email selected content.	Tooltip	★ _k
BID124877	Viewer	V017	Rescale view.	Tooltip	★ _k
BID124877	Viewer	V018	Rescale view to accommodate entire width.	Tooltip	★ _k
BID124877	Viewer	V019	Rescale view to accommodate entire height.	Tooltip	★ _k
BID124877	Viewer	V020	Rescale view to accommodate entire width and height.	Tooltip	★ _k
BID124877	Viewer	V021	Reset view to native dimensions.	Tooltip	★ _k
BID124877	Viewer	V022	Configure font attributes.	Tooltip	★ _k
BID124877	Viewer	V023	Flip view top to bottom.	Tooltip	★ _k
BID124877	Viewer	V024	Flip view side to side.	Tooltip	★ _k
BID124877	Viewer	V026	Reorient view 90 degrees to the right.	Tooltip	★ _k
BID124958	List/View Log Files	A051	Find the next occurrence of the text entered.	Tooltip	★ _l
BID124958	List/View Log Files	A052	Find a previous occurrence of the text entered.	Tooltip	★ _l
BID124958	List/View Log Files	A053	Print the log file.	Tooltip	★ _l

BID124958	List/View Log Files	A054	Attach the log file to an email message.	Tooltip	★ I
BID124958	List/View Log Files	A055	Copy selected log text to the clipboard.	Tooltip	★ I
BID124958	List/View Log Files	A056	Save a copy of the log file.	Tooltip	★ I
BID124958	List/View Log Files	A092	Connect to location and find HECM components.	Tooltip	★ I
BID124951	Configure Content Loader & Content Type	A057	Create a new content type.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A058	Delete the selected content type.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A059	Save changes to the content type and content loader rules.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A060	Save changes to the content type and create a new content type.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A061	Discard changes to the content type and loader rules.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A062	Move content loader rule up in the list.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A063	Move content loader rule down in the list.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A064	Create a new content loader rule.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A065	Edit the selected content loader rule.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A066	Delete the selected content loader rule.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A067	Select a folder as the destination for this rule.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A068	Move match condition up in the list.	Tooltip	★ f
BID124951	Configure Content Loader & Content Type	A069	Move match condition down in the list.	Tooltip	★ f

BID124951	Configure Content Loader & Content Type	A070	Create a new match condition.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A071	Edit the selected match condition.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A072	Delete the selected match condition.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A073	Create a new assignment.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A074	Edit the selected assignment.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A075	Delete the selected assignment.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A076	Save the settings for this match condition.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A077	Discard changes to this match condition.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A078	Save settings for this assignment.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A079	Discard changes to this assignment.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A080	Save this rule to the list of content loader rules.	Tooltip	 f
BID124951	Configure Content Loader & Content Type	A081	Discard changes to this content loader rule.	Tooltip	 f

2.6.2.5. Headings

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID125603	Configure ACLs	A001	Configure ACLs	Heading	
BID125602	Configure Roles	A006	Configure Roles	Heading	

BID125600	Configure Groups	A013	Configure Groups	Heading	
BID124951	Configure Content Loader & Content Type	A026	Configure Content Types	Heading	f
BID124952	Configure Domains	A033	Configure Domains	Heading	d
BID124976	Admin: Manage workflow worklist	AW02	Configure Worklists	Heading	
BID124977	User: Manage Task	UW12	Worklists with Tasks Assigned to You: <w>	Heading: The value of “w” is worklist – dynamically generated from user selection in LSP	
BID1123841	Review Content	RC14	Check In Content	Heading	i
BID159113	Drop Zone	C004	Add File/URL	Heading	j
BID159113	Drop Zone	C007	Added	Heading	j
BID159113	Drop Zone	C009	Field(s) Required for Destination Folder	Heading	j
BID124977	User: Manage Task	UW10	Worklists with Tasks You Created: <w>	Heading: The value of “w” is worklist – dynamically generated from user selection in LSP	
BID124977	User: Manage Task	UW03	Reassign Task(s)	Heading	
BID124977	User: Manage Task	UW05	Assign Task	Heading	
BID124597	Configure Logs	A044	Configure Log Files	Heading	
BID123842	Search	F004	Select a Metadata Template	Heading	h
BID123842	Search	F006	Select a User	Heading	h
BID124958	List/View Log Files	A049	View Log Files	Heading	l

2.6.2.6. Information

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID124961	Log On User	S003	The system has encountered <n> failed logon attempts. To avoid a potential security breach, would you like to change your password now?	Information Message: Value of <n> is a system counter that keeps track of failed logon attempts.	
System-wide			Are you sure you want to log off?	Information Message	
System-wide			The system will not save work in progress. Are you sure you want to exit?	Information Message	
BID124961	Log On User	S006	Your password will expire in <n> days. Would you like to change it now?	Information Message	
BID124965	Log Off User	S009	There has been no system activity in the last <n> minutes. This session will terminate in 30 seconds.	Information Message: The value of <n> comes directly from configure auto logoff parameter in BID: Configure Security Policies.	
BID124963	Change Password	S013	To voluntarily change your password, please provide your current password and enter a new one twice.	Information Message	
BID124977	User: Manage Task	WI01	One or more selected task(s) are already owned. Only task(s) that are not owned have been marked as owned by you.	Information Message	
BID124977	User: Manage Task	WI02	One or more selected task(s) are not owned by you and cannot be returned to the worklist. Only those task(s) that you own have been returned.	Information Message	

BID124977	User: Manage Task	WI03	One or more selected task(s) are not owned by you and cannot be marked as completed. Only those task(s) that you own have been completed.	Information Message	
BID124977	User: Manage Task	WI06	One or more selected task(s) are not owned by you and cannot be reassigned. Only those task(s) that you own have been reassigned.	Information Message	
BID124977	User: Manage Task	WI11	One or more selected task(s) are already owned and cannot be released. Only those task(s) that you own have been released.	Information Message	
BID124977	User: Manage Task	WI13	Only task(s) that are not owned and in a new status can be edited. The task(s) that can be edited have been changed to draft status to allow you to edit the task(s).	Information Message	
BID			This file is currently open. Close the file to complete the check-in process.	Information Message	
BID			No content matching your criteria was found. Please refine your search.	Information Message	
BID			You already subscribe to this folder.	Information Message	
BID			You now subscribe to this folder. An email notification will inform you when content in this folder changes.	Information Message	
BID			You no longer subscribe to this folder.	Information Message	
BID			Select a single version at a time to update metadata.	Information Message	
BID			This content is checked out by another user and cannot be deleted.	Information Message	
BID1123841	Review Content	RC13	Update any metadata associated to this content before check in.	Information Message	 i

2.6.2.7. Instructions

Bid(s)	BID Name	Code	Message	Type / Notes	Status
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BID125603	Configure ACLs	A002	Choose an ACL from the list below to view, edit or delete it. Select the “New” button to create a new ACL.	Instructions	
BID125603	Configure ACLs	A003	Enter a name and description, and choose security rights for this ACL.	Instructions	
BID125602	Configure Roles	A007	Enter a name and description for this role.	Instructions	
BID125602	Configure Roles	A008	Select a role from the list below to view, edit or delete, or select the “New” button to create a new role.	Instructions	
BID125600	Configure Groups	A014	Choose a group from the list below to view, edit or delete it. Select the “New” button to create a new group.	Instructions	
BID124591	Configure Content Loader & Content Type	A027	Select a content type from the list below to view, edit or delete. Select the “New” button to create a new one.	Instructions	f
BID124591	Configure Content Loader & Content Type	A031	Select a rule below to edit, delete or change evaluation order. Content Loader evaluates rules in the order they appear.	Instructions	f
BID124952	Configure Domains	A034	Select a domain from the list below to view, edit or delete. Select the “New” button to create a new one.	Instructions	d
BID124976	Admin: Manage workflow worklist	AW03	Select a worklist from the list below to view, edit or delete. Select the “New” button to create a new worklist.	Instructions	
BID124977	User: Manage Task	UW17	Select a task from the list below to view, own, return to the worklist, complete or delete.	Instructions	
BID159113	Drop Zone	C005	Select format, file and template complete metadata fields. Content will be uploaded to the server. The destination is determined by the content loader rules.	Instructions	j
BID159113	Drop Zone	C010	Complete the following required fields to continue adding content.	Instructions	j
BID124966	Configure users	S027	Select a user from the list below to view, edit or assign a new temporary password. Select the “New” button to create a new user.	Instructions	
BID124977	User: Manage Task	UW01	Select a task from the list below to view, edit, release or delete. You may also create a new task for this worklist.	Instructions	
BID124977	User: Manage Task	UW04	To reassign task(s) you must enter a reason and select a worklist.	Instructions	

BID124977	User: Manage Task	UI01	Every task must reside in a worklist. Select either a group or personal worklist below to assign to the task.	Instructions	
BID123751	Configure Mail Server	A037	These settings determine how system-generated email is managed.	Instructions	
BID124597	Configure Logs	A045	Select a source location and component below to view/update log settings.	Instructions	
BID123842	Search	F005	Choose a template from the top list. Review a template's assigned fields from the lower list to help in your selection.	Instructions	h
BID123842	Search	F007	Choose a user name by last name, first name or ID. To narrow your search, enter a value in the text field to find in the list.	Instructions	h
BID124958	List/View Log Files	A050	Select a source location, component and log file below to view, email, copy or save.	Instructions	l

2.6.2.8. Success

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID124964	Configure security policies	S014	The newly configured password policies are now in effect.	Success Message	
BID124964	Configure security policies	S024	The newly configured auto logoff duration is now in effect.	Success Message	
BID124961	Log On User	S031	Your password has been successfully changed.	Success Message	
BID124977	User: Manage Task	WS01	Task(s) have been successfully reassigned.	Success Message	
BID124977	User: Manage Task	WS02	Task(s) have been successfully completed.	Success Message	

2.6.2.9. Other

Bid(s)	BID Name	Code	Message	Type / Notes	Status
BID124877	Viewer	V002	The viewer does not support this file format. Check out the content first and use a third-party application to view it.	MCP Message	k
BID		V003	No matches found.	MCP Message	

2.6.2.10. Help 

Both static Help (also known as “Global Help” or “Universal Help”) and contextual Help are available for initial release. Universal Help (defined as non-specific help that presents all topics at once in sort of an “owner’s manual” fashion) is available principally from the main cascading menu. See also [hotkeys](#). Screen-level Help is always available in both the [main window](#) and in [dialog boxes](#), unless otherwise specified, by the following access points:

Main Window
(Contextual Help icon)



Dialog Boxes
(Contextual Help button)



2.6.2.11. Tooltips  

Use tooltips throughout the application for two purposes:

- to elaborate on the function of various controls
- to provide specific feedback messages (e.g., error details) and helpful tips

Only use tooltips when they give additional information; never have a tooltip read the same as the label/button text. Toolbar tips are readable sentences, punctuated and capitalized as such. They are short, concise and relevant. They do **NOT** wrap unless so long that they would otherwise extend beyond the display’s viewable area. See the Error-handling section for details on tooltip use in conjunction with errors.

Note: column headers do **NOT** have tooltips.

2.7. Canned Reports 

2.7.1. Standard Layouts

More information regarding standard headers, footers, tabular data formats and summary information will occupy this space.

2.7.2. Exceptions and Special Cases

More information regarding special reports and their properties will occupy this space.

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4.0. Glossary

4.1. Terms

4.1.1. A – F

Arial: a sans serif font common to most major computer operating systems

Baseline: status of an artifact denoting completion of the formal review process and subsequent approval

Best practices: methodical, repeatable processes that most efficiently and effectively produce a desired outcome

Boolean: a complete system for binary operations and algebraic logic named for George Boole, an English mathematician at University College Cork in the mid 19th century

Cascading menu: a collapsing navigation scheme that “unfolds” options from general to specific

Color(s):

Analogous – any adjacent colors on the 12-value color wheel

Complementary – any two colors directly opposite each other on the 12-value color wheel

Primary – red, yellow and blue, colors impossible to obtain from the mixture of any other colors

Secondary – green, orange and purple, colors formed by mixing primary colors

Theory – the idea that color choices affect mood, cognition and perception in positive and negative ways

ENIGMA: *See* HECM.

Extension: the (typically three) letters/numbers after the dot in a file name, indicating the type of file to both the user and the OS

Grouping: the logical orienting of similar operations in proximity to enhance usability and the overall user experience

Gutter: the print term, now also common in computer UI parlance, for the space between columns of copy

4.1.2. G – L

Heuristics: best practice “rules of thumb” guidelines learned through experience to produce better quality product

4.1.3. M – R

Operation: a specific task a user wishes to accomplish in HECM, such as add new content or configure auto logoff

Pane: a portion of a window dedicated to certain functions; in HECM panes drive content in other panes

Sans Serif: a font type lacking serifs

Pixel: short for “pixel element,” one of the millions of “dots” on your display that comprise the computer’s user interface

Section 508: portion of the Rehabilitation Act of 1973 – legislation that requires federal agencies to provide disabled employees with access to IT resources, such that their experience approximates that of able-bodied employees as much as possible

Serif: the flairs on the ends of some strokes that make up letters and symbols

Trebuchet MS: a sans serif font common to most major computer operating systems

Usability: the measure of how efficient, effective, engaging, error-tolerant and easy to use a product is for meeting users’ needs

Verdana: a sans serif font common to most major computer operating systems

4.1.4. S – Z

No entries.

4.2. Acronyms

4.2.1. A – F

ACL: Access Command List – the list of system permissions and rights assigned to a user role

BCT: Breadcrumb Trail – the navigable display above the MCP that indicates the user’s current location

BID: Behavioral and Interactive Design (Document) – See **UIS**.

BMP: Bitmap – a 1- to 24-bit lossless image type that supports neither animation nor transparency

DIB: Device Independent Bitmap – See **BMP**.

4.2.2. G – L

GIF: Graphics Interchange Format – an 8-bit lossless image type that supports animation and simple transparency

HECM: Horizon Enterprise Content Manager – McKesson’s content/workflow manager, offspring of HPF

HPF: Horizon Patient Folder – McKesson’s medical content/workflow manager, forebear of HECM

JPG (or JPEG): Joint Photographic Experts Group – a 16-bit lossy image type that supports neither transparency nor animation

LSP: Left Selection Pane – the collapsible left-hand pane in the interface that drives the content of the MCP

4.2.3. M – R

MC: Message Center – a designated area in the [LSP](#) designed to show tips, help, errors, alerts, logs and other messages to the user

MCP: Main Content Pane – the right-hand larger (2/3 of horizontal space) pane used to display detailed data

OCD: Object Count Display – the indicator that shows the number of objects in a given folder

OCD-1 – the object count display associated with the Main Content Pane

OCD-2 - the object count display associated with the Object Details Pane

ODP: Object Details Pane – the pane below the MCP that displays details about a selected object

OOS: Out of Scope – any feature, concept or functionality explicitly excluded from a project for a particular release

OS: Operating System – a computer program that controls a system’s hardware components and file system, thereby facilitating the operation of other specialized programs; examples include Microsoft Windows, MacOS and Linux

PNG: Portable Graphics Format – a capable 8- to 24-bit image type that supports animation and sophisticated transparency

PX: Pixel – See **Pixel**.

4.2.4. S – Z

TBD: To Be Determined – something pending further consideration before a final decision is made

UCD: User-Centered Design – user interface design that focuses on the user’s goals, mental models, operations and requirements

UI: User Interface – the system by which a computer user interacts with software and/or hardware to accomplish goals

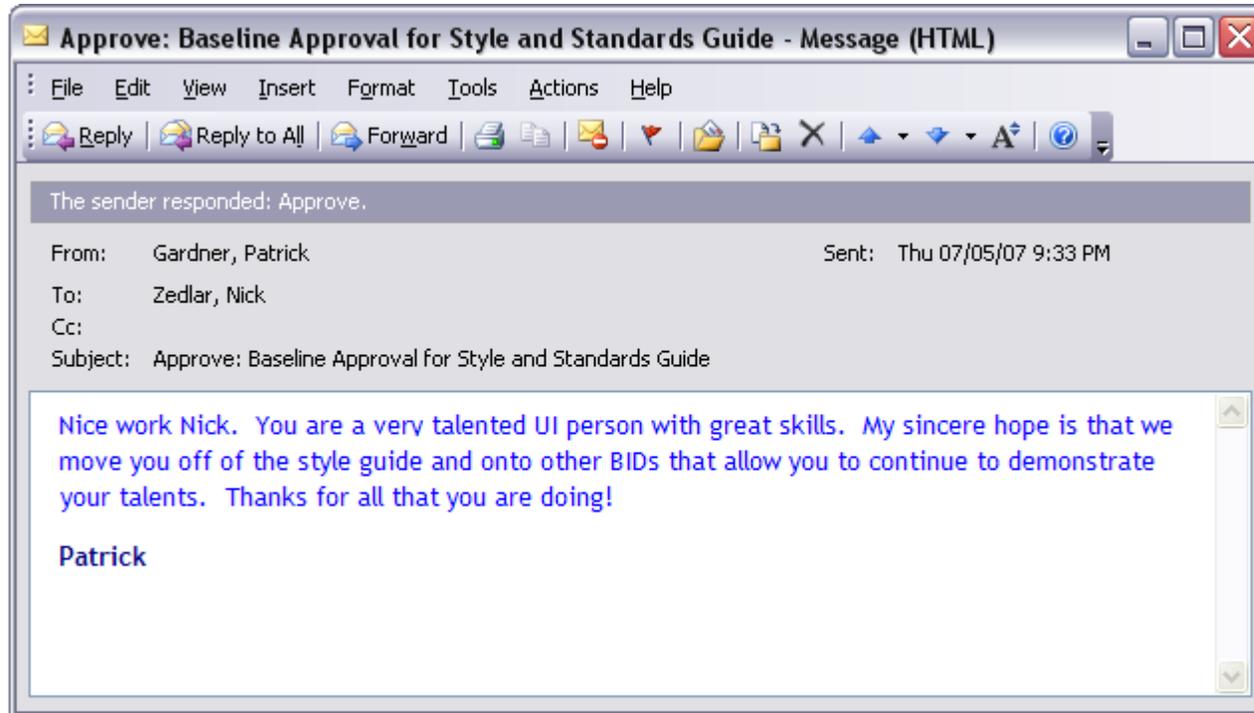
UIS: User Interface Specifications – a detailed account of the capabilities, appearance and function of a computer interface, formerly known as BID

URL: Universal Resource Locator – the Web address of, or link to, specific content on the Internet

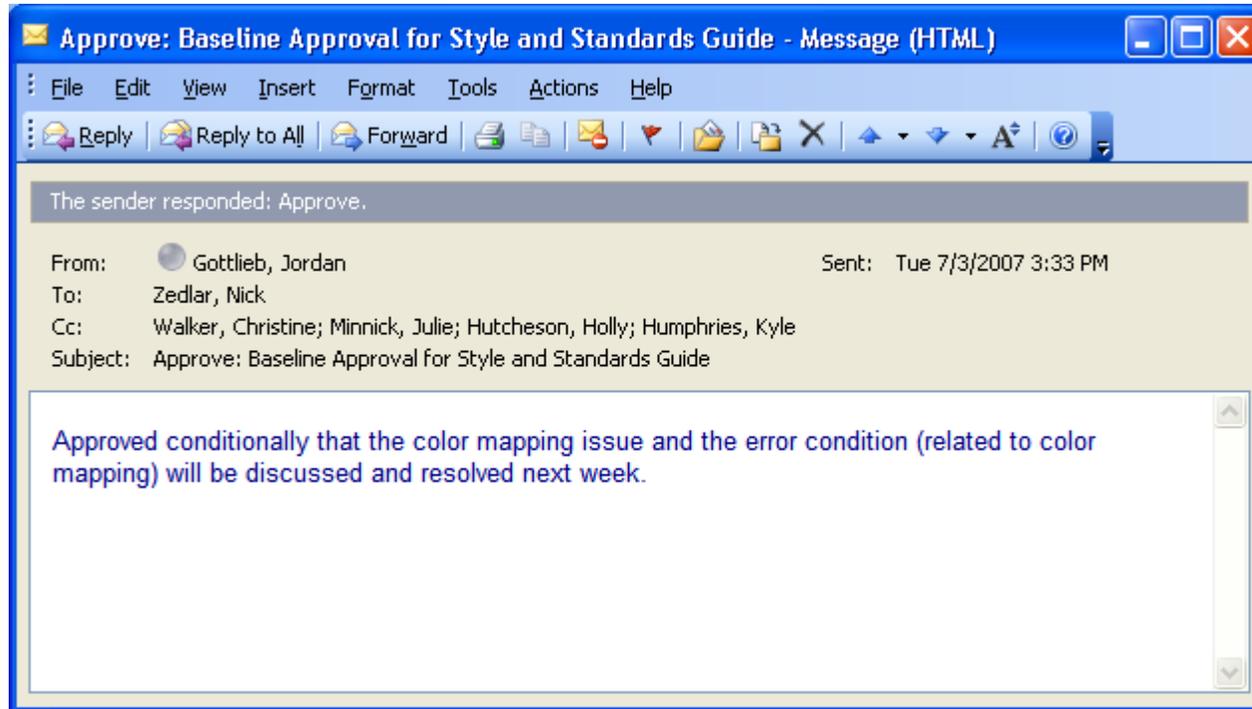
5.0. Document History

5.1. Baseline Approval

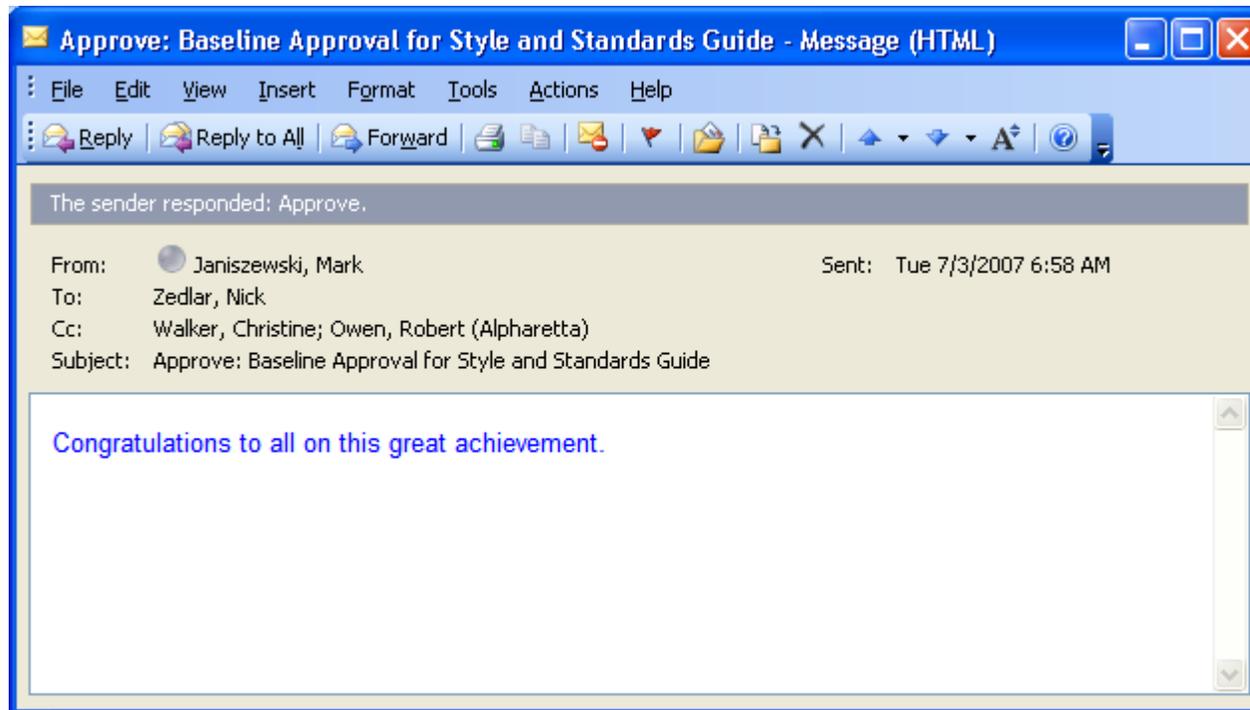
5.1.1. Patrick Gardner



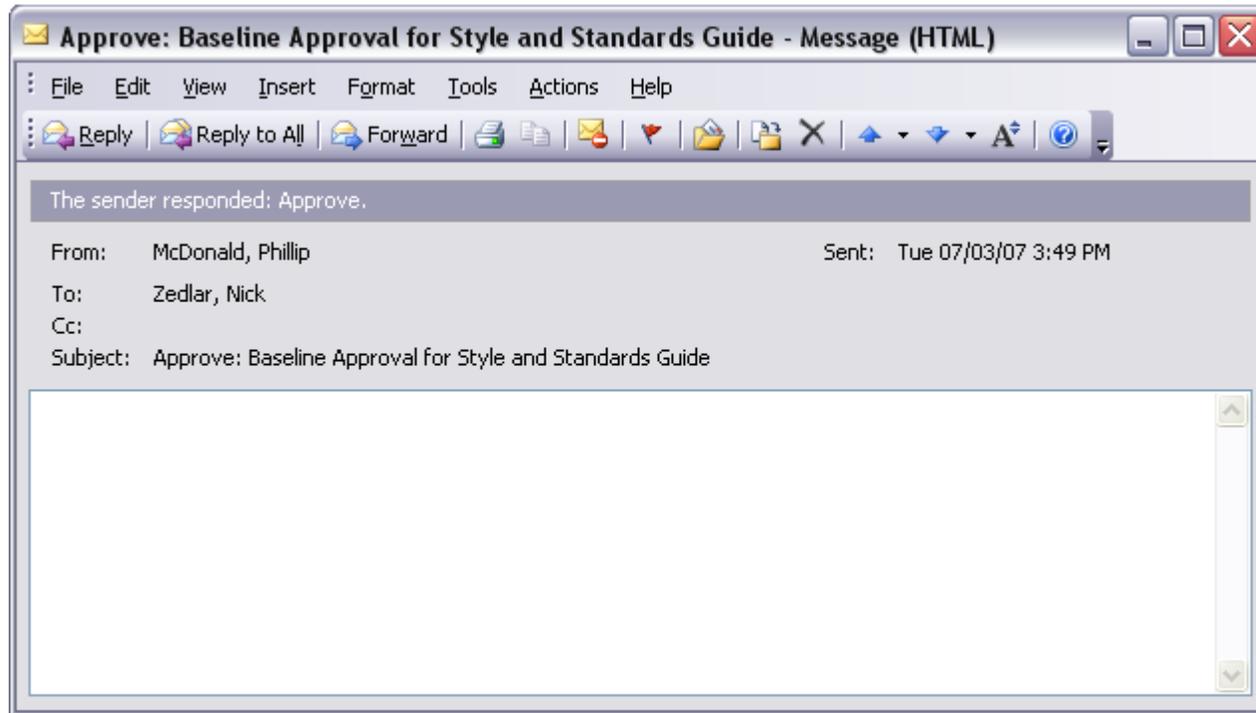
5.1.2. Jordan Gottlieb



5.1.3. Mark Janiszewski



5.1.4. Phillip McDonald



5.2. Changes

Date	Description / Details
07/12/07	Fixed incorrect inactive Security icons in Admin cascading menu
07/09/07	Updated dialog box messaging icons
07/06/07	All official baselining approvals are in and documented; added and highlighted new line-items for subsequent review
02/06/07	Started HECM UI Style and Standards Guide