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PORTMAN Graphic user Interface (GUI) In general

How to get started

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Version 1.0
This document is based on the underlying system PORTMAN 7.24

Contents

1. Introduction

One of the main purposes in PORTMANs new interface (GUI), has been to ensure a recognizable and uniform module structure, which facilitates a better workflow for the user.

Just as in the old PORTMAN, the menus and windows are fixed in a frame, but as a new feature, the user is allowed to create new instances / tabs of modules. This gives the user the possibility to “pause” the current task and make another task such as a search in other modules.

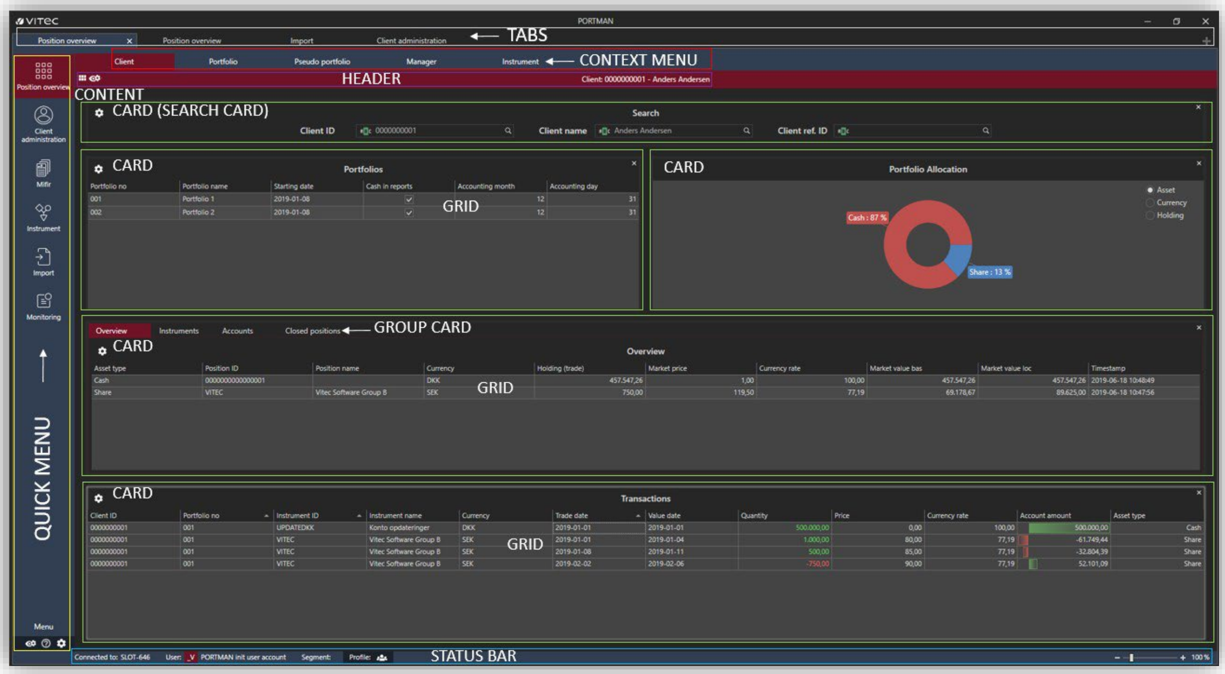
This user interface has its own menu bar and all rescheduled modules can only be found in here.

2. General components of PORTMAN

Just as in the old GUI, the menu and all the windows in this user interface is located in a fixed frame, but now it is possible to start several instances of the same or other modules at the same time, if needed.

Before you start working in PORTMAN, it is important to know the new components the application consists of. These components are marked with colored frames and described below here.

Figure 1.The GUI and its components

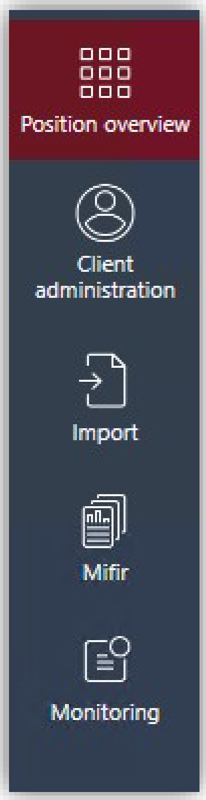


Quick menu: Add the modules preferred or used the most (Yellow frame).
Tabs: Open several instances of the same or new modules at the same time (White frame).
Context menu: Work with different approaches / contexts in the modules (Red frame).
Header: Shows the context in which the work is done (Purple frame).
Cards: Content divided into different tables. (Green frame).
Status bar: Displays the status of the entire application: server name, user, segment and profile (Blue frame).

2.1. Menu/Quick menu

On the left-hand side of the user interface, a list of modules that the user quickly can access is figuring. At first login, only Position Overview are shown as default, but the user has the opportunity to add the modules that are used the most.

Figure 2. List of modules



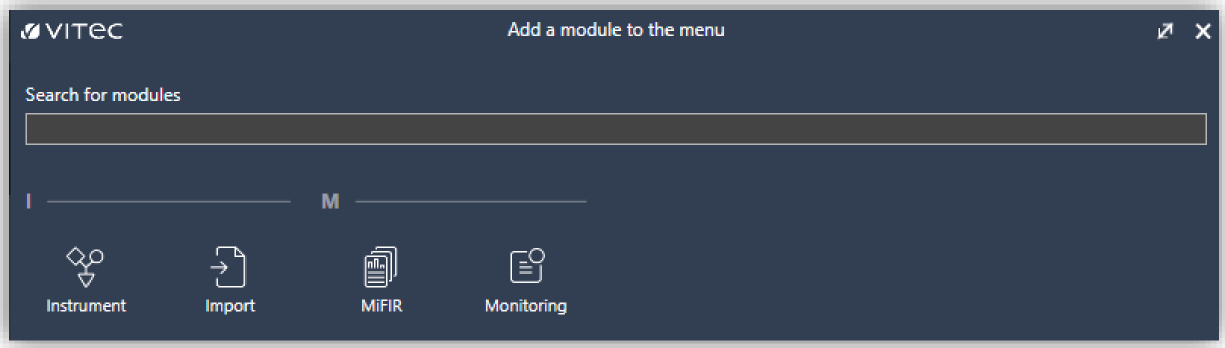
From the Menu, in the bottom left corner, it is possible to customize the Quick menu. Here, it is e.g. possible to choose to display the most used modules in the list of modules.

Figure 3. Menu

In the Quick Menu, you can search between the modules that have been converted and which the client has permission to. New modules will continuously be added to the list, as the modules are converted from the old PORTMAN. When a module is added to the menu, it will no longer appear in the old PORTMAN menu.

In order to add a new module to the list of modules, you must search for it in the quick menu. Here, input will be matched so that you quickly can find the desired module. By clicking on the module, it is automatically added to the list of modules.

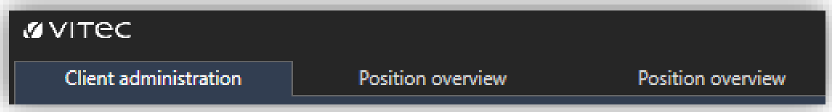
Figure 4. Quick menu



2.2. Tabs

Working with PORTMAN, the user often has several tasks running at the same time, and often there is a need to be able to start multiple instances / tabs of the same module at the same time. This is possible with the feature - Tabs.
Tabs makes you able to shift between different instances and are known from modern web browsers like Google Chrome and Safari. A new tab is opened by pressing at the top right corner. There can be a maximum of three tabs open at the same time.

Figure 5. Multiple tabs



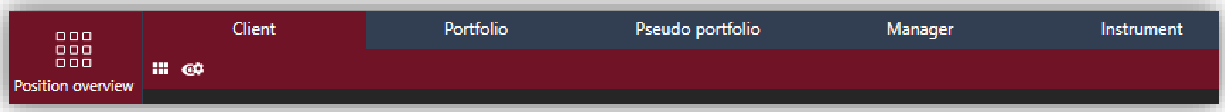
If the user wants certain modules to be opened in tabs or in the list of modules every time starting up PORTMAN (see figure 2), this can be done by storing the setup with a specific profile. If this profile is set as "default", the modules will open automatically at the next startup of PORTMAN. Read more about creating Profiles in ‘How to get started - Profiles and Views’.

2.3. Context menu

At the top of the window in many of the modules, a context menu is located, i.e. a menu that allows the user to work with several different input angles to the same underlying data set.

E.g. in Position Overview, the user can work with data from five different perspectives. "Client", "Portfolio", "Pseudo portfolio", "Manager" and "Instrument".

Figure 5. Context menu in Position Overview



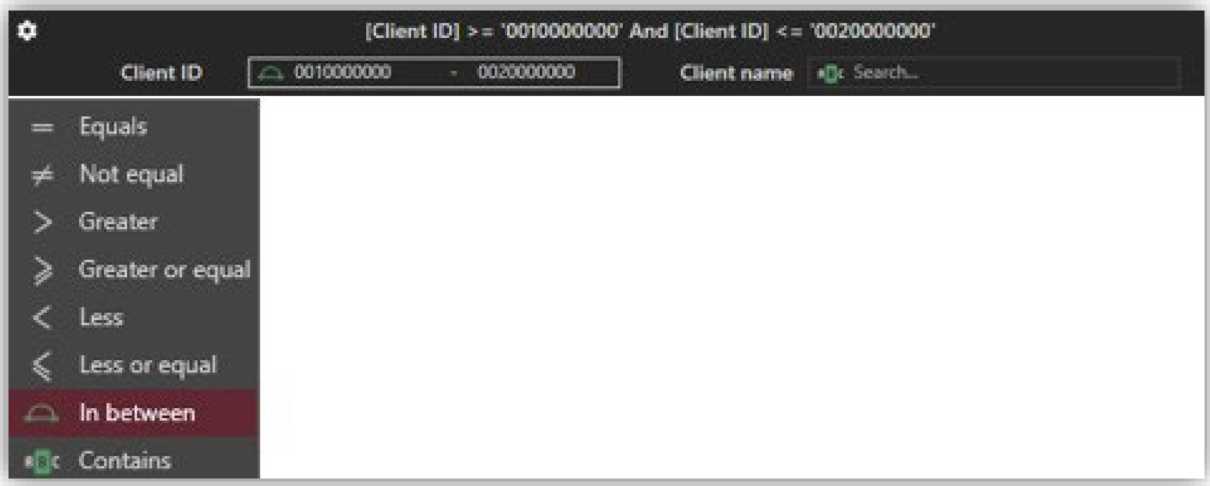
2.4. Cards

Within each module, the content is divided into cards. Each card aims to frame relevant components in a meaningful constellation for the user.
There are different types of cards in the user interface, whereas the most common ones are described and illustrated below here.

Search card

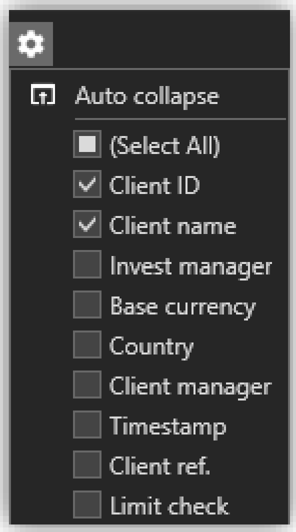
Search cards are used for searching / delimiting all data in the table on the server and are often used as the first card in a module.
By pressing in the search box, it is possible to use different operators so that the result of the search becomes exactly what the user needs.

Figure 6. Example of searching in a search card in Client Administration



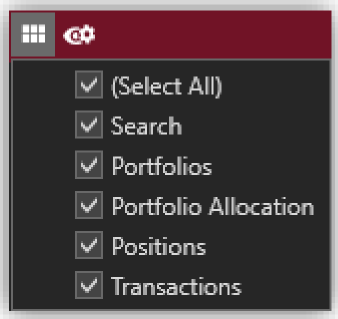
In order to get more search functionalities, the user can press the small gear in the search card, which gives them the following functionalities listed below:

Figure 7. Example of searching in Client Administration



For all cards in the modules, the user has the option to add / deselect the cards that the user finds relevant / irrelevant. Cards can either be removed by pressing the cross on the right-hand side of the card or by pressing the grid icon on the left-hand side of the header. In the menu , it is also possible to add a deselected card if desired.

Figure 8. Select/deselect of cards



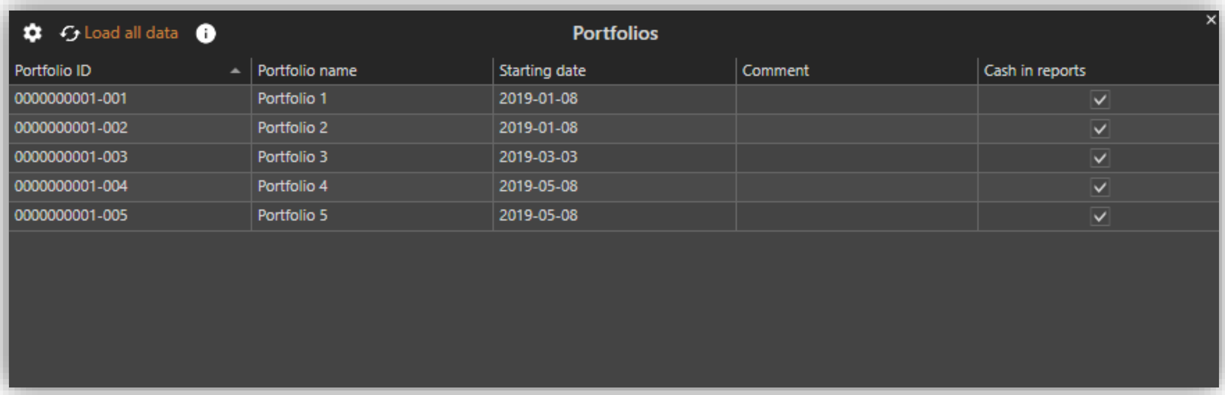
When cards are removed or added from the window, the remaining cards and columns will automatically be resized. In this way, it is possible to view the entire content of, e.g. a portfolio's transactions at one time in one large card.

Ground card

Ground cards are used for displaying data in a grid table and are one of the most frequently used cards in the modules.

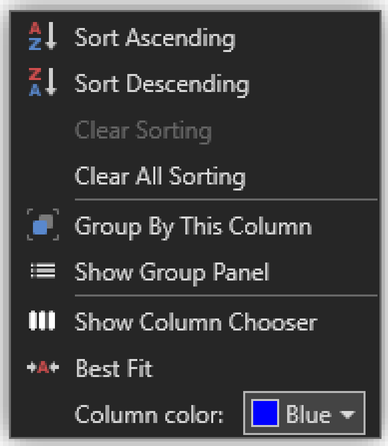
Cards containing grids allow the user to interact with the grid and customize what the user wants to see in the card.

Figure 9. Example of a card with a grid



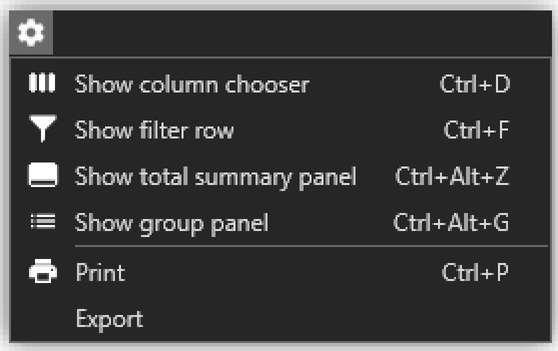
In the grid, you can move the columns around, remove those that are not needed or add new ones. At the same time, by pressing the individual column, it is possible to sort, group or change color for the column.

Figure 10. Features by right-clicking on a column heading in grid



The gear at the top of the card allows the user to print or export the content of the grid, make filtering or summaries, so that each card shows the information the user needs.

Figure 11. Card settings



The setup that the user makes in the individual cards can be saved in a view. This is done by pressing the button located at the top of the header. Read more about creating views in 'How to get started - Profiles and Views'.

A consistent functionality in the user interface is "drill down". Each time you delimit a record, the underlying data of the record is delimited in the underlying cards. E.g. in Position Overview, if a portfolio is activated, it is delimited in the other cards in the module on the portfolio's holdings and the portfolio's transactions.

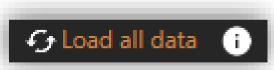
When working in the GUI, the following icon will sometimes show.

By moving the mouse pointer over the icon with the exclamation mark, the following explanation displays: "Not all data loaded! Click here to get all the data. "

From a performance perspective, not all data from the table in the database is loaded into PORTMAN at once. Searches in the data are on the entire dataset, but the data set shown in the grid is reduced to show the first 200 entries from the search.

Hence, if the icon is displayed, it is an indication saying that more data exists in the database than shown in the grid. If the user wants to show all the data, press "Load all data", which will lead to the remaining data (max 10.000 records) being loaded into the grid.

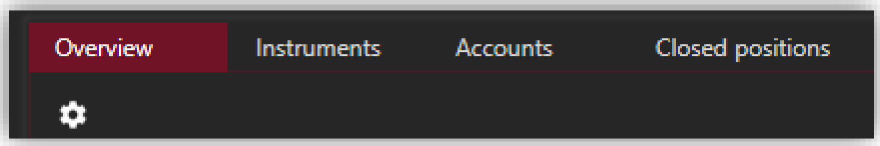
Group card



Consists of several cards in one card. Each card is represented as a tab / button.

The different cards provide different perspectives on data, as data is presented in different ways. This gives the user a better overview of data from different perspectives.

Figure 12: Group card from Overview in Position Overview



2.5. Status bar

The status bar at the bottom of the window shows which server the PORTMAN application runs on, which user that is logged in, segment used and which profile and setup that are selected.

Figure 13: Information in status bar