

Profiles and views

How to get started

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This document is based on the underlying system PORTMAN 7.24

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1. Introduction

Depending on what the user currently is working on in PORTMAN, with Profiles and Views, the user can save settings concerning columns, sorting, filtering and cards in a window, and switch between the different profiles/views.

2. Terms

Essential terms when working with Profiles and Views:

Cards

Are used for grouping information. An example of a card is the window "Portfolios" in the module Position Overview.

Context menu

Includes the features that are available for each module. In the module Position Overview, "Client", "Portfolio", "Pseudo portfolio", "Manager" and "Instrument" are examples of Context menus.

Menu/Quick menu

Located in the bottom left corner of the screen. Here you can search for modules and select in a quick manner.

Settings

Located in the top left corner of each card you find the Settings button. By clicking  it is possible to choose and control settings related to columns, filtering, grouping and summaries within areas and cards

Tabs

Allows the user to have a maximum of three instances (tabs) open at the same time. Tabs are known from internet browsers such as Google Chrome or Safari. It could be three tabs of the same module

e.g. three Position Overview tabs or three tabs from three different modules.

Views

Allows you to switch quickly between different views within the same Context menu.

Sorting, filtering, columns and card setup, adapted to the individual work situation, can be stored in a view.

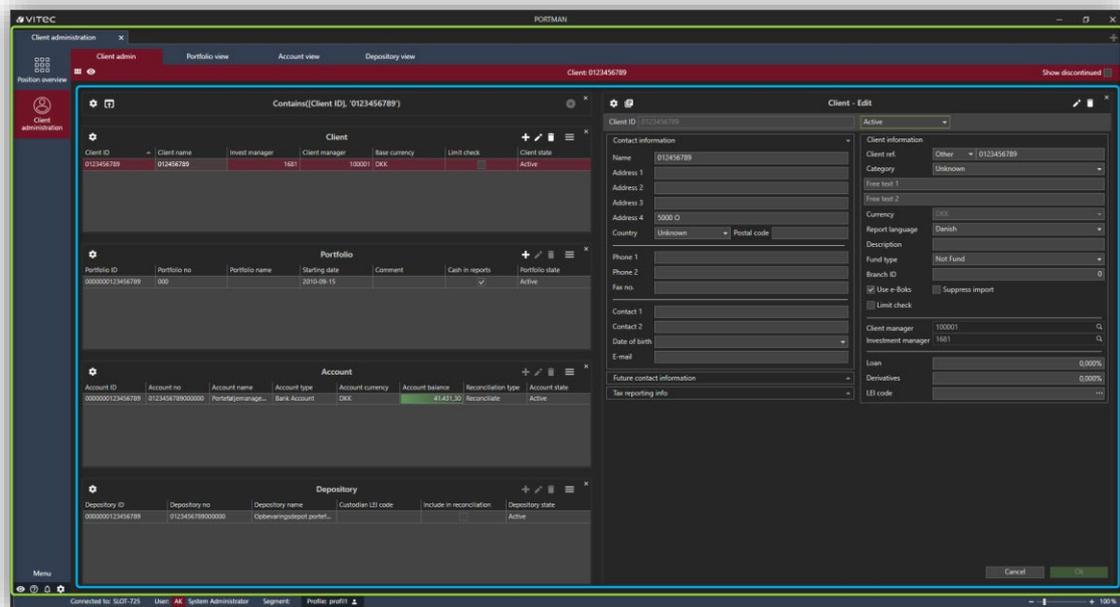
Profiles

A saved profile contains the outer framework of PORTMAN i.e. Tabs, Quick menu and Views.

3. Profiles

With profiles, it is possible to switch between setups in PORTMAN. A saved profile contains the setup of Tabs, Quick menu and Views. In Figure 1 below, the green frame illustrates the content of a Profile, while the blue frame illustrates the content of a View.

Figure 1. Difference between Profiles and Views

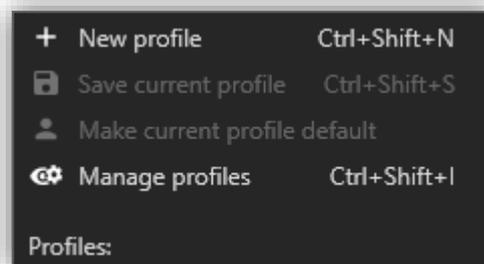


3.1. Setting up Profiles

A default profile (Portman Default) is set up when logging on to PORTMAN's user interface for the first time.

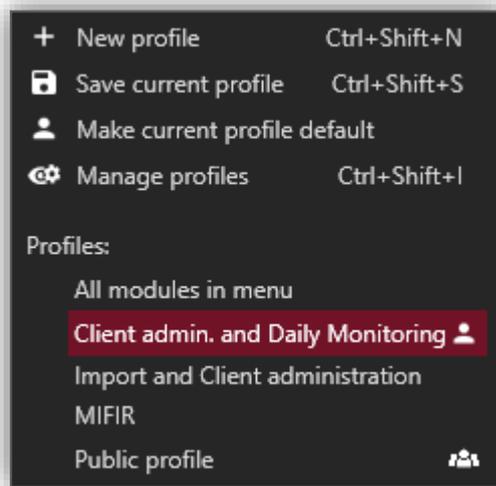
Under "Menu" in the bottom left side of the screen, you can set up your own profile(s). This is done using the button  and "New profile" (Ctrl + Shift + N). The first profile created is automatically set as default.

Figure 2. Setting up Profiles



It is possible to create multiple profiles and switch between them.

Figure 3. Setting up multiple Profiles

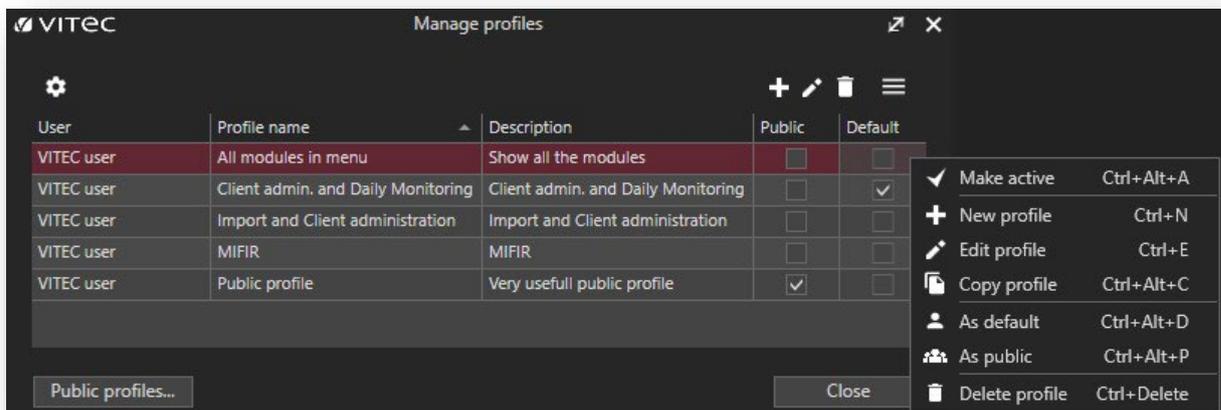


"Manage profiles"  (Ctrl + Shift + I) allows you to choose which profile should be set as default. Furthermore, it is possible to copy/edit an existing profile or make your profiles public so that other users can use them.

By pressing the "Public profiles ..." button, the profiles that other users have made "Public" are displayed. Copy a public profile to make it your own.

The profile chosen as default is the profile PORTMAN uses at startup.

Figure 4. Manage Profiles

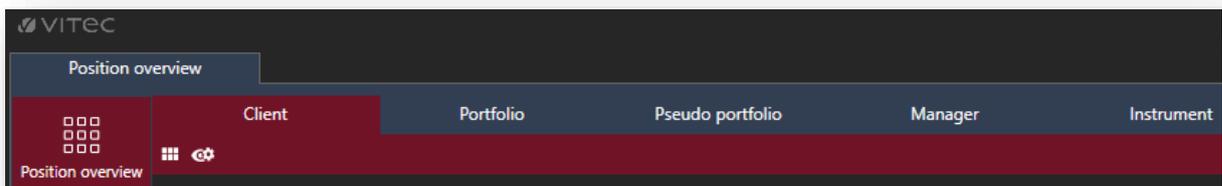


4. Views

When working in a specific module it may be useful to be able to save the setup concerning e.g. columns, sorting, filtering, groupings, formatting or which windows / cards that should be displayed. This is possible with views.

4.1. Setting up Views

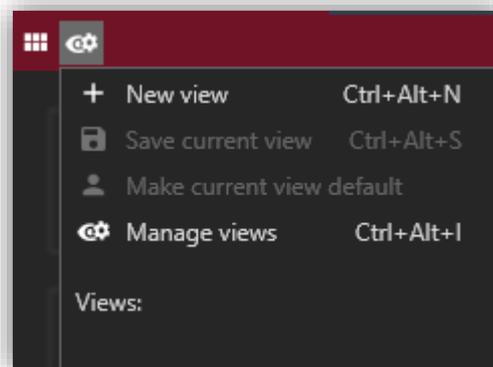
Figure 5. View



To create a view, a profile is required. It is possible to have multiple views on each profile.

As when creating profiles, views are also created by pressing . The button is located at the top of the window just below the context menu.

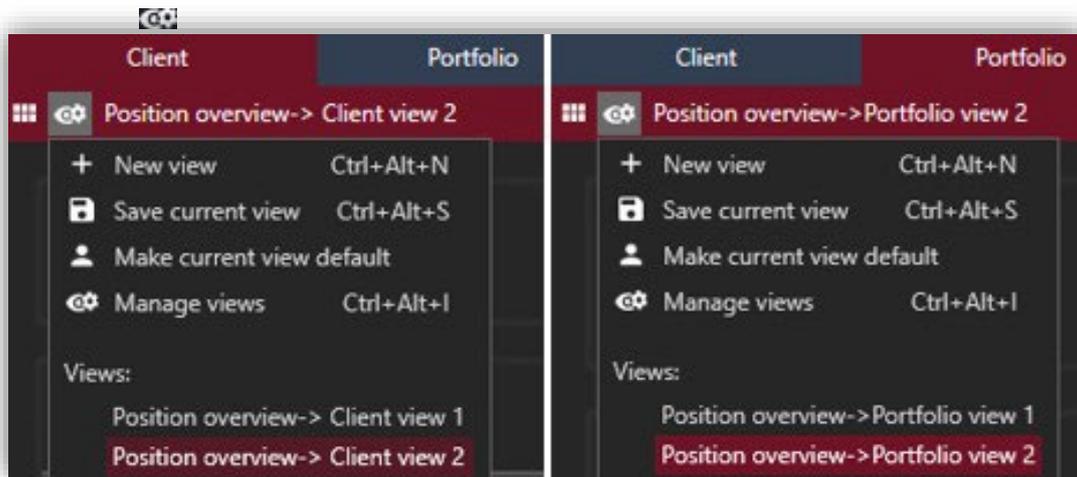
Figure 6. Setting up Views



It is possible to create more views and switch between them.

Creating a view applies within the same Context menu i.e. in the module "Position Overview" where the context menus "Client", "Portfolio", "Pseudo portfolio" etc. exist. The views created apply only to the individual context menu.

Figure 7. Creating more views of different context menus



"Manage views" (Ctrl + Alt + I) allows you to choose which view should be set as default when opening PORTMAN, take copies of existing views, make views public or add/edit/delete views.

Figure 8. Manage views

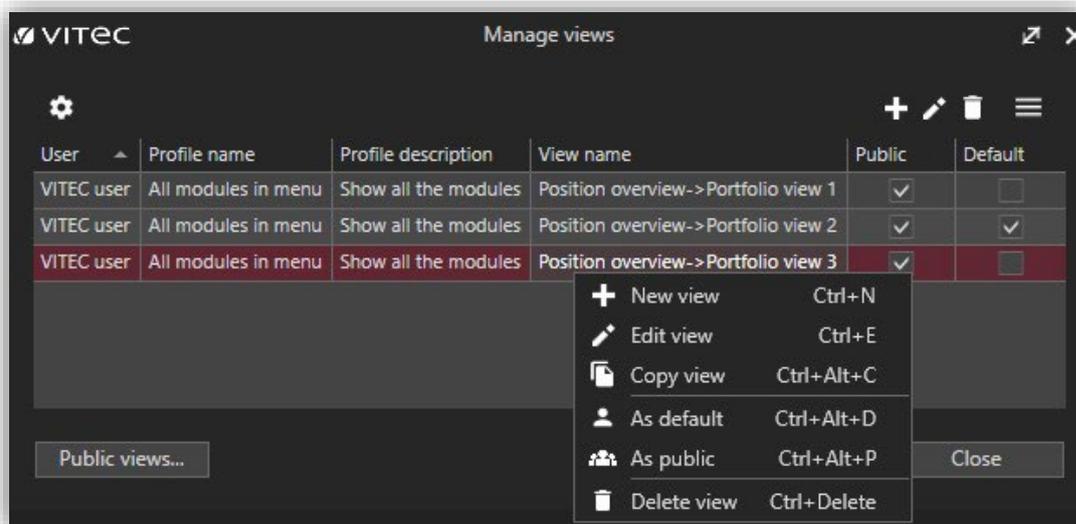


Figure 8 shows how three views are linked to the profile "All modules in menu" and can be used in the module "Position Overview" within the context menu "Client".

The view called "Position Overview-Client view 2" is marked as default, meaning that it is activated as default when selecting the profile "All modules in menu".

All three views are marked as public so that other users can copy and use them.

If you copy a view / profile from another user, changes in the original view / profile will not affect the copied version. In order to import the changes, you are required to copy the view / profile again.