

Primary Toolbar & Framework Spec

H1 & Toolbar Pt 1

Applied to all instances

H1 & Toolbar Heights (both total 50px, INCLUDING bottom border 1px)



Vertical Spacing (content center aligned. Page margins are still 2x space)



Use MDS V3 Button icon-only button container for implementing spacing

H1 & Toolbar Pt 2

Applied to all instances

Buttons (H1 is a breadcrumb string of buttons, or text, & icons)

`mds-button variation="flat" size="large" ~label is parent page~`

`icon: angle-right`

ALT: If read only, use `@include mds-level-5-heading()`

`mds-button variation="secondary" size="large" icon="pencil" ~label is name of list~`

icon-only buttons: default size. Label like tooltips

`mds-search-field "Locate by name or ticker" variation="secondary" label="Locate" size="small"`

Default tooltips

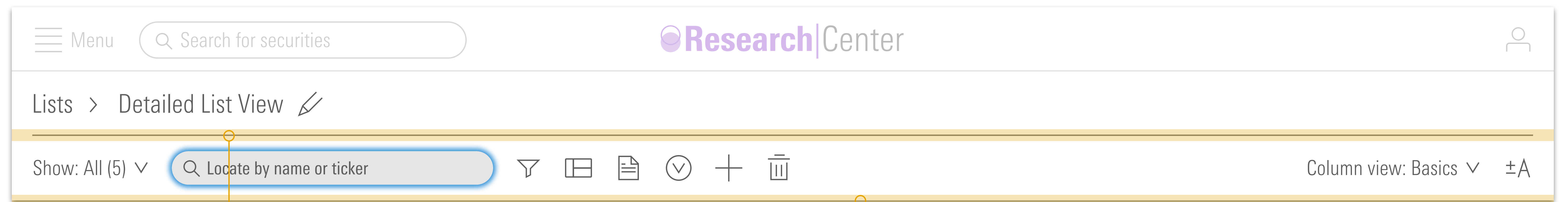
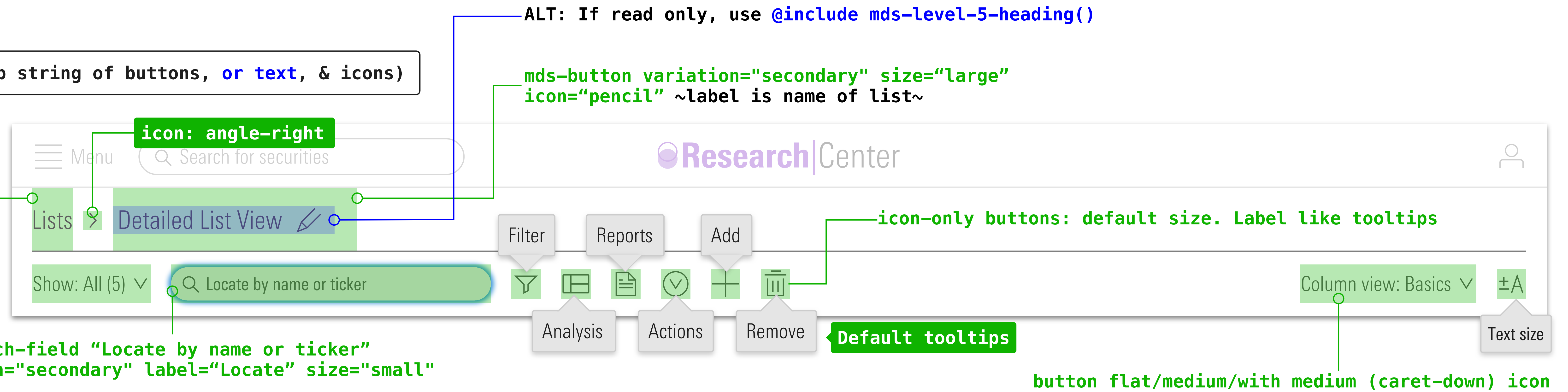
button flat/medium/with medium (caret-down) icon

Header & Toolbar Borders

Notes on Header!

'Pencil' icon button only appears for named investments.
-> See pages 5,6,11

"Untitled" (H1, Level 5)
is used at the end of an [object] create] breadcrumb
-> See pages 7-10



Toolbar in Context:

Grid

Anaylsis

Object Creation/Edit

Column View Edit

Toolbar w. Grid Only

(This is a List)

Note: →

- 'Locate' behavior applies in every instance. This way the user can see the located items and still perform actions on grid

- Secondary search width is responsive.

- Some actions are 'disabled' until securities are checked

- For List: 'Funnel' icon label/tooltip is "Filter"

(Screener is different)

- Secondary search
Max: 250px
Min: 200px (responsive)

Note:

User can rename a created object using the popover from name button in the header. This is a default size form and save button within a 300px popover

Search expands to 250px width, small secondary search

\$mids-space-2-x
between toolbar and page content

Search expansion pushes other icons

Become active when securities are checked

The screenshot shows the ResearchCenter interface with several annotations. At the top, a search bar is highlighted with a blue border and a callout box titled "Enter document name" containing the text "AWS3.0_STG_DetailedviewofList_001" and a "Save" button. A pink arrow points from the search bar to a secondary search bar below it, labeled "Search expansion pushes other icons". A blue box highlights the secondary search bar with the text "Search expands to 250px width, small secondary search". A red box highlights the space between the toolbar and the page content with the text "\$mids-space-2-x between toolbar and page content". A green arrow points from the "Filter" icon to the text "Become active when securities are checked". The main table has columns: #, Name, Ticker, Type, Morningstar Page, Global Fund Report, Morningstar Category, and Fund Objective. The table is divided into "BENCHMARKS" and "INVESTMENTS" sections. The "INVESTMENTS" section has 5 rows, with the first and third rows checked. The "Filter" icon is highlighted with a grey box.

| # | Name | Ticker | Type | Morningstar Page | Global Fund Report | Morningstar Category | Fund Objective |
|-------------------------------------|--|--------|------|------------------|--------------------|--------------------------------------|-------------------------------|
| ▼ BENCHMARKS | | | | | | | |
| <input type="checkbox"/> | AB Municipal Income California A | — | — | — | — | — | — |
| <input type="checkbox"/> | American Funds Tax-Exempt Fund of CA A | — | — | — | — | — | — |
| <input type="checkbox"/> | C&S Risk Parity Glb Natural Resources NR | — | — | — | — | — | — |
| <input type="checkbox"/> | Calvert US LC Core Responsible PR USD | — | — | — | — | — | — |
| INVESTMENTS | | | | | | | |
| Average | | | | | | | |
| <input checked="" type="checkbox"/> | 1 1290 Diversified Bond R | TAFTX | MF | 11/30/2019 | 06/10/2019 | US Fund Muni California Long | Minicipal Bond - Single State |
| <input type="checkbox"/> | 2 1290 DoubleLine Dynamic Allocation A | MECMX | MF | — | — | US Fund Muni California Intermediate | Minicipal Bond - Single State |
| <input checked="" type="checkbox"/> | 3 13D Activist A | D | MF | — | — | US Fund Muni California Intermediate | Minicipal Bond - Single State |
| <input type="checkbox"/> | 4 13D Activist C | DOD | MF | 11/30/2019 | 04/22/2019 | US Fund Muni California Long | Minicipal Bond - National |
| <input type="checkbox"/> | 5 13D Activist I | EACAX | MF | — | — | US Fund Muni California Long | Minicipal Bond - Single State |

Toolbar w. Grid Only

(This is a List)

Responsive

Grid:

WHEN THE GRID IS $\leq 768PX$

- Updated toolbar within grid:

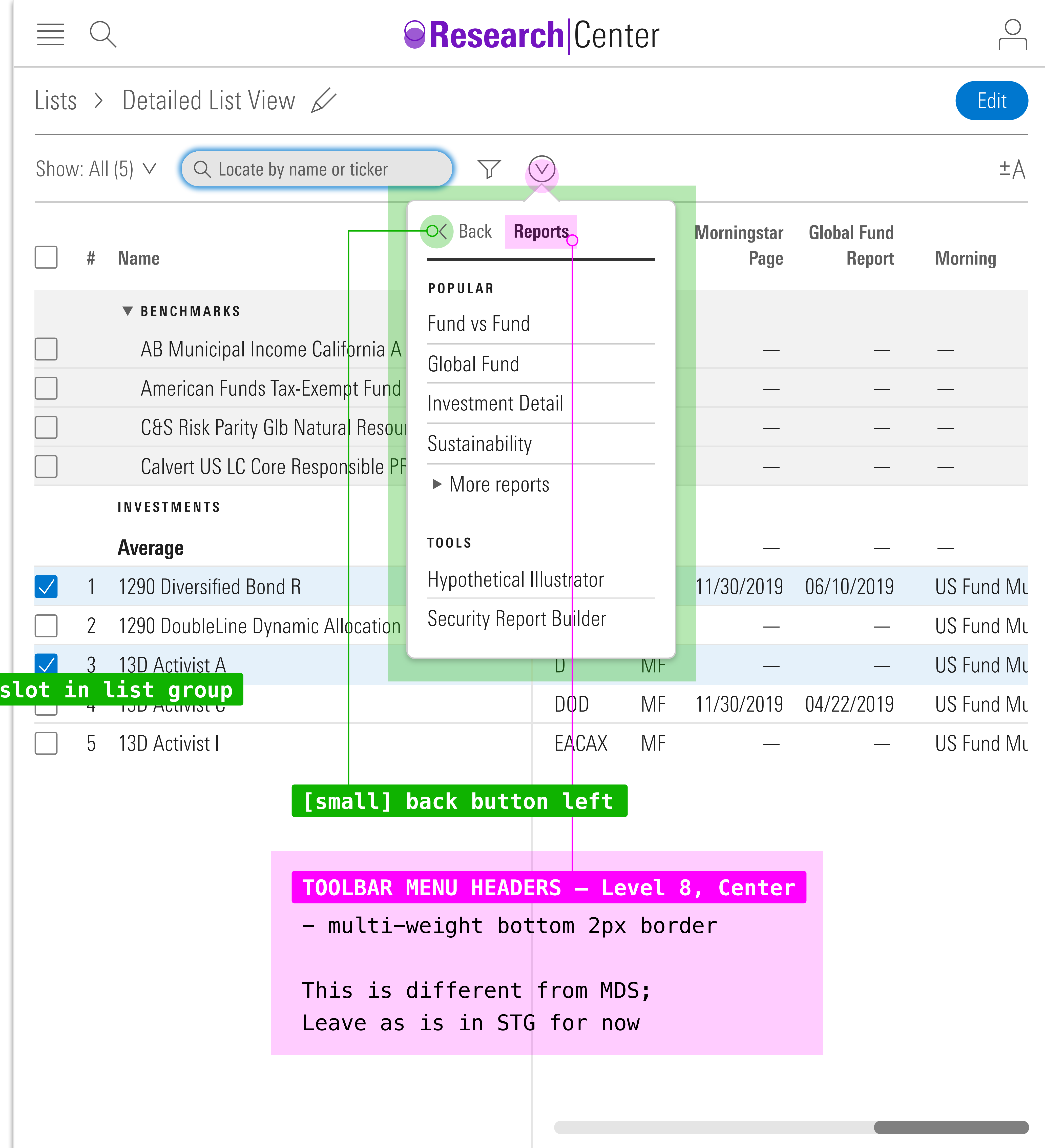
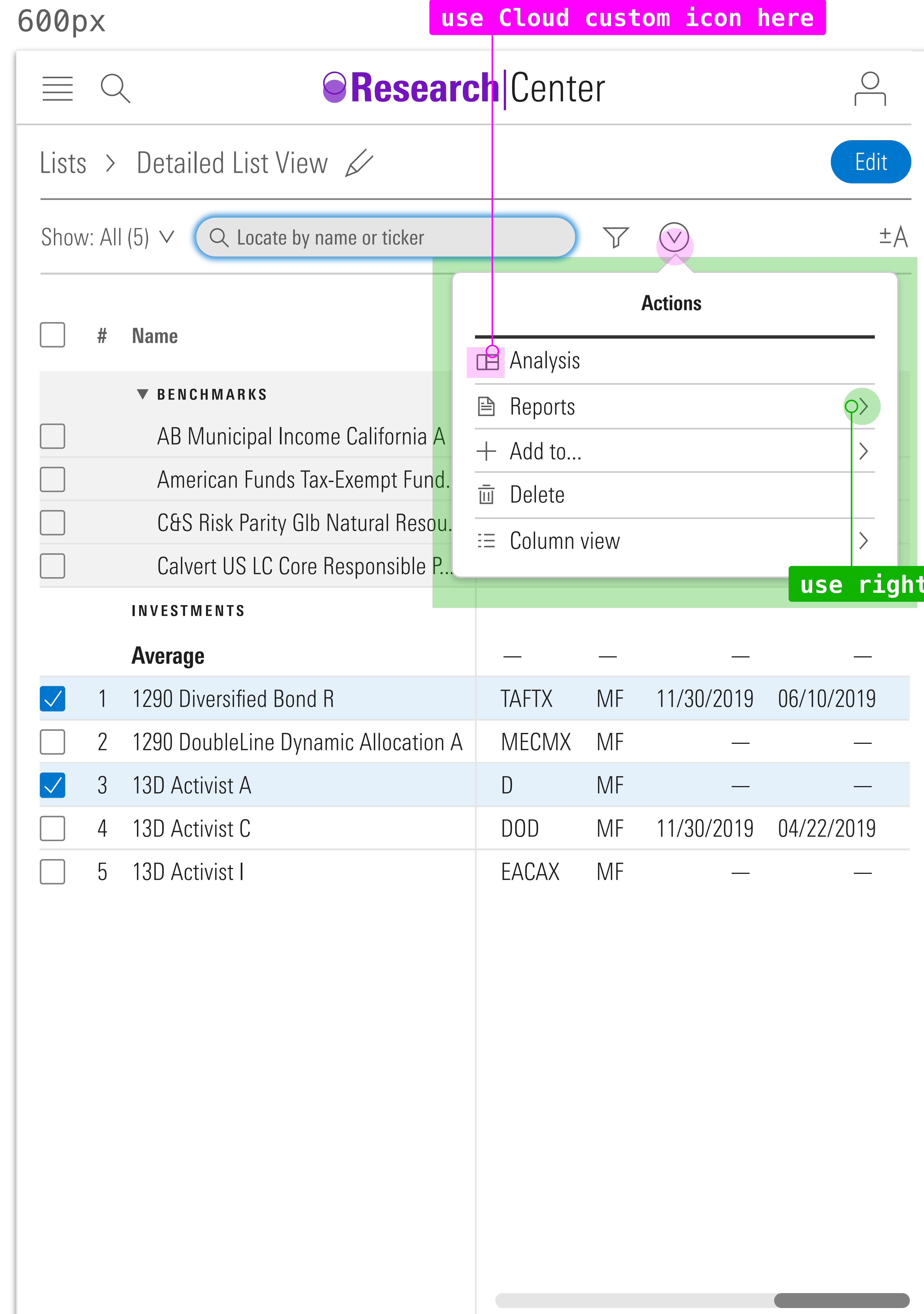
'Analysis' and 'Reports' and 'Column view: NAME' and "add" and "delete" are now rolled up into the 'Actions' icon.

NOTE: The 'Reports' and 'Column view' menus are accessed by the > icon

- 'Locate' icon expands into SMALL secondary search UI. The width of this is responsive to the available space, up to 250px. Leave `$mids-space-2-x` margin between each toolbar object. -> This employs the spacing used for Button Container in MDS V3 for spacing between button groups -> Use in all instances

🔍 - 'Funnel' icon is ONLY present in List toolbar as a filtering mechanism

SEE MENU POPOVER STRUCTURE ON THIS PAGE



768px

Analysis Panel – Open

Grid:

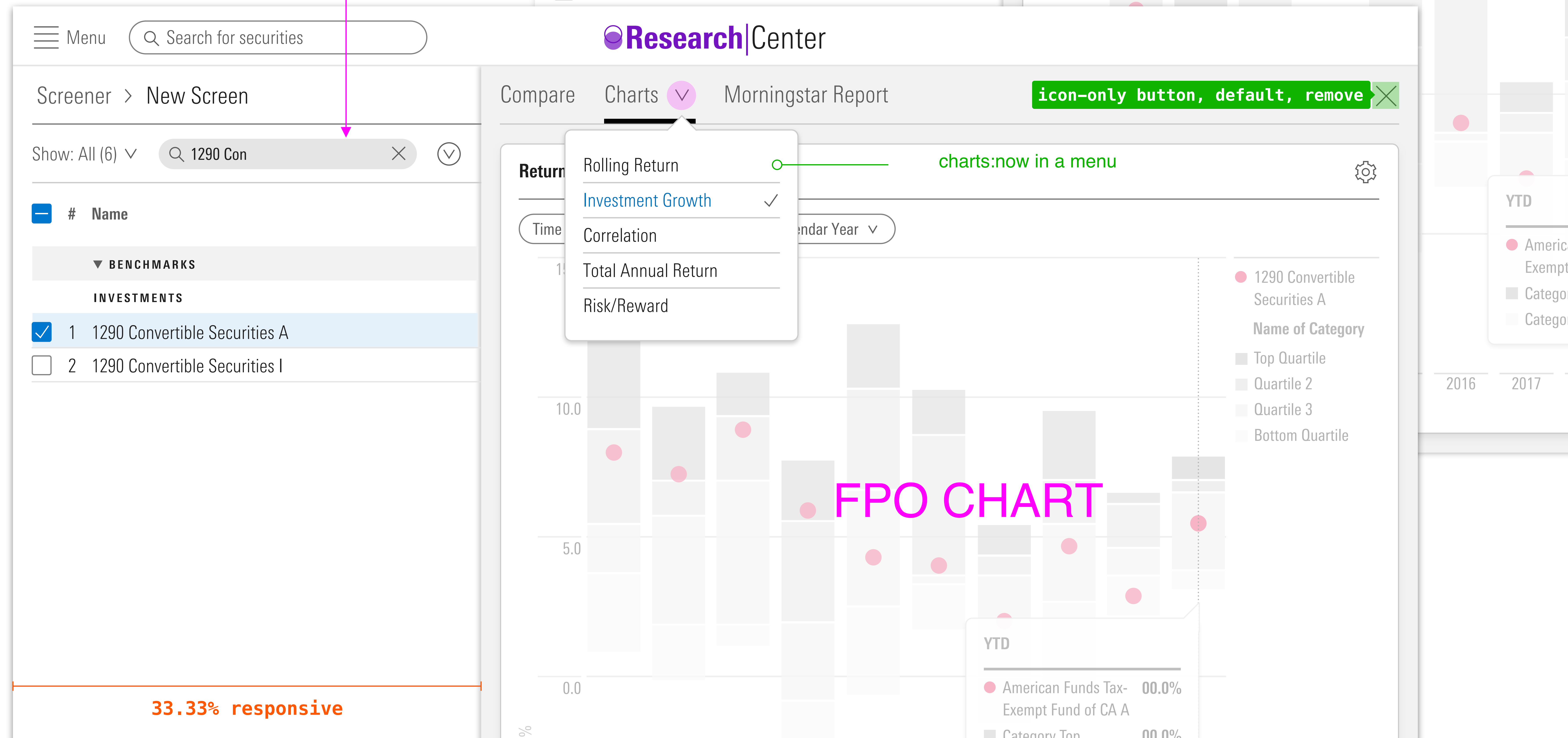
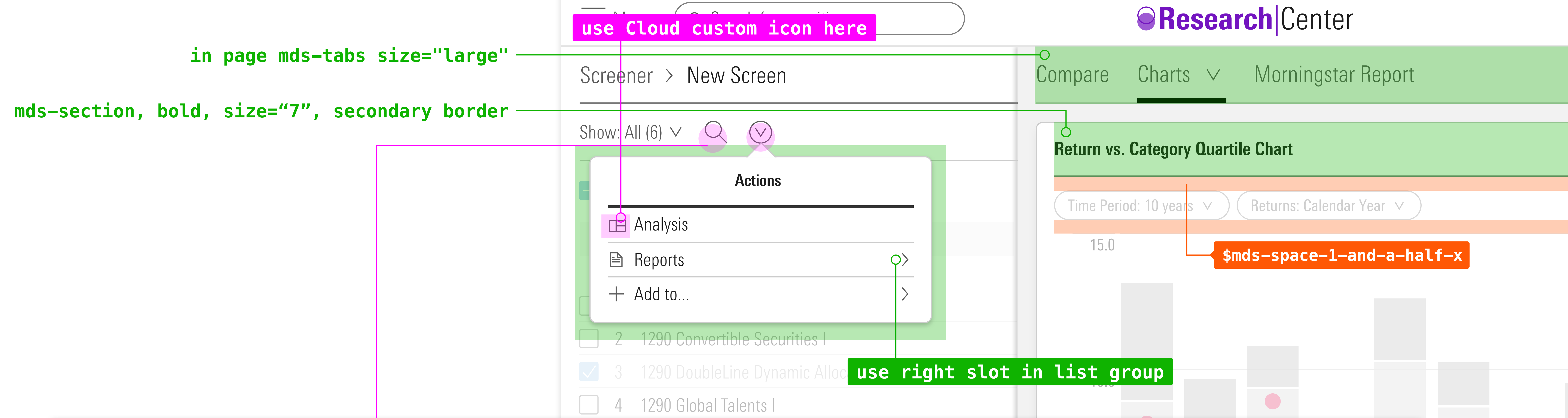
- Updated toolbar within grid: 'Analysis' and 'Reports' and 'Column view: NAME' are now rolled up into the 'Actions' icon.

Analysis Panel:

- replaced panel header with large in-page tabs only
- Updated tabs labels

Chart Component:

- updated component header and gear icon size (default)
- chart secondary buttons vertical spacing changed to 1 and a half x



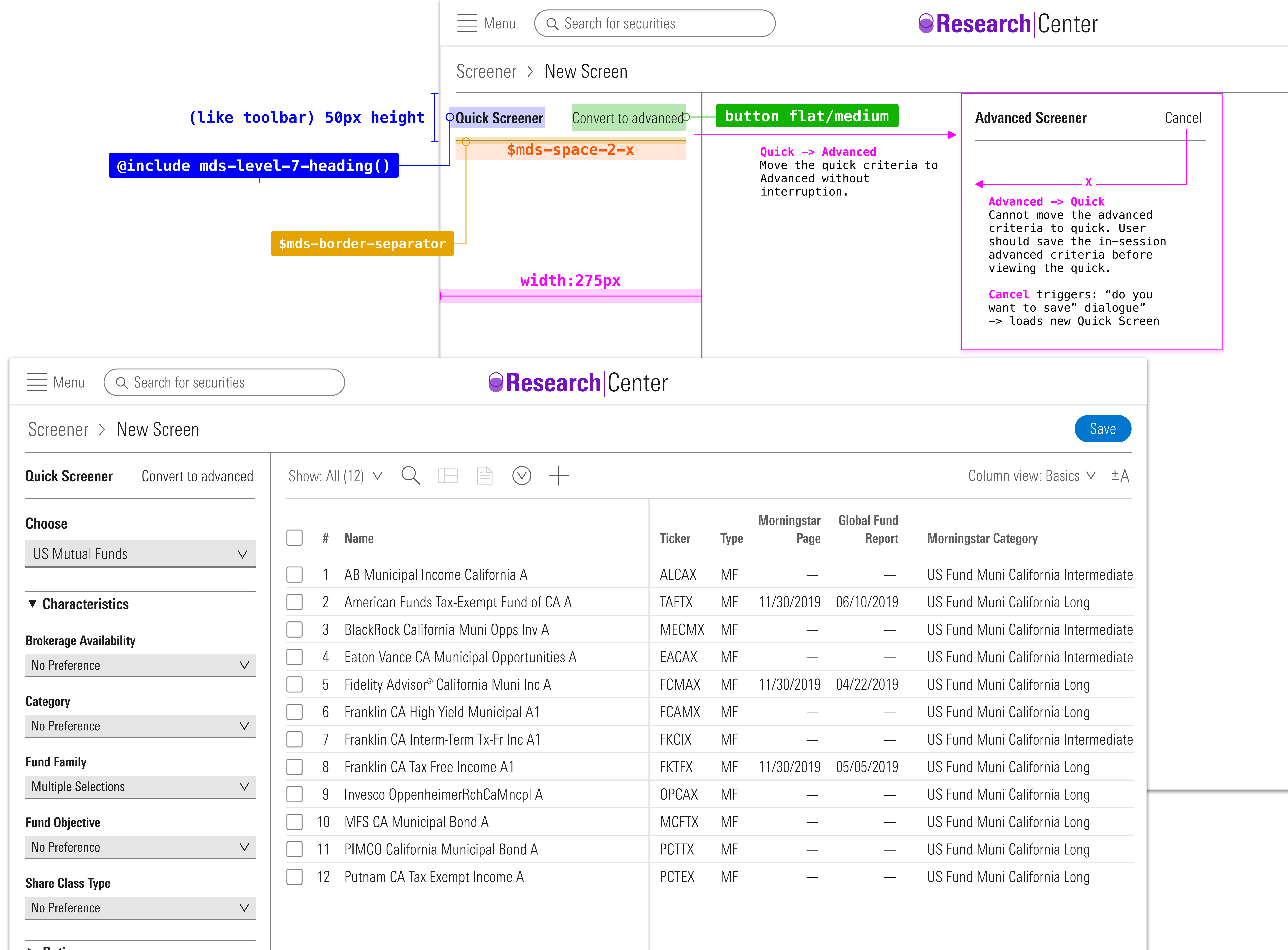
Screener Panel – Always open

Toolbar:

Employ the 2x spacing used for Button Container in MDS V3 for spacing between button groups

Screener Panel:

- Updated header: Quick Screener
- Removed tabs
- Added `Convert to advanced` button (note, the user cannot convert back to `Quick screener`)
- the added `save` button in the H1 allows user to save: optional action

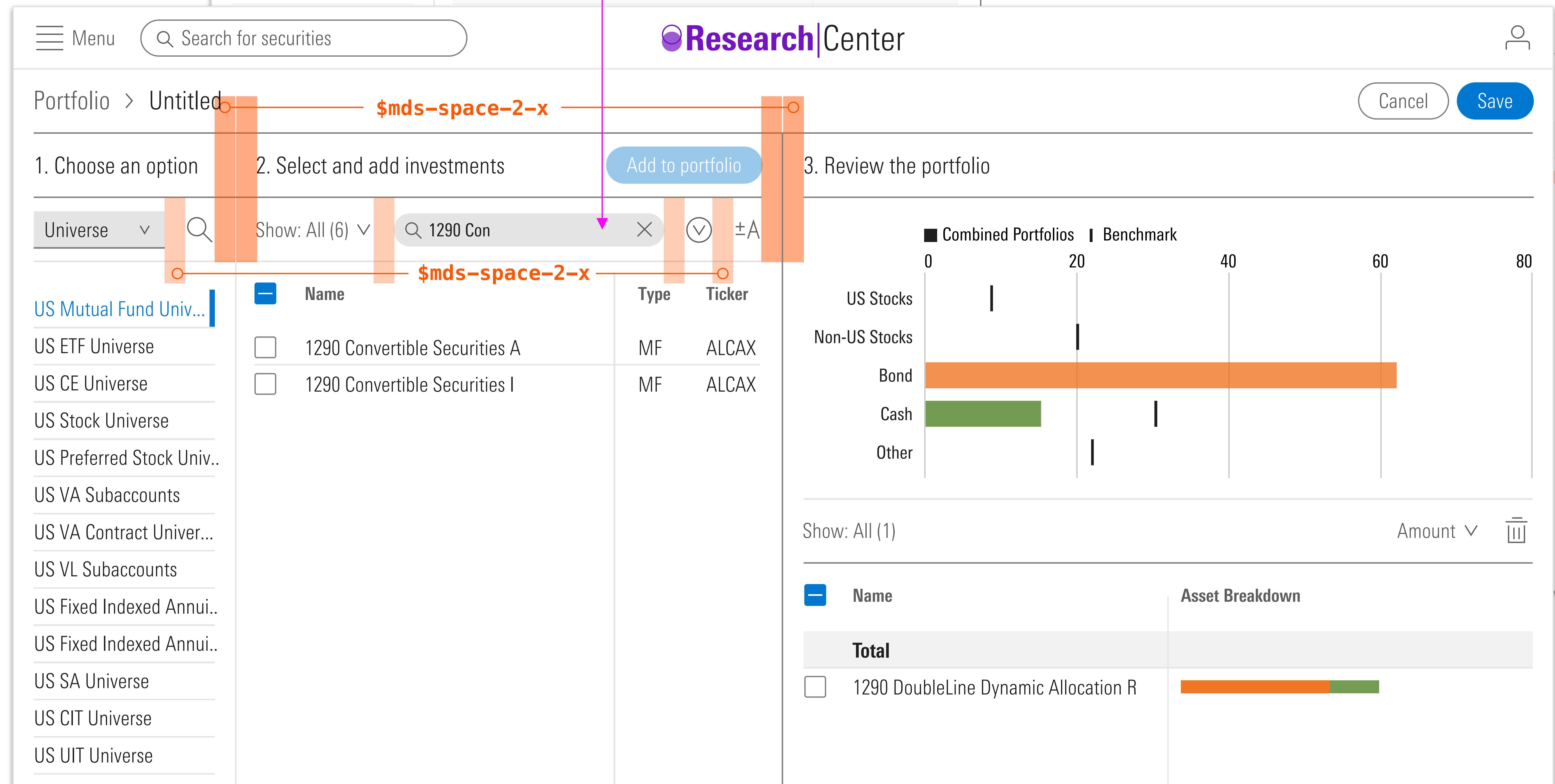
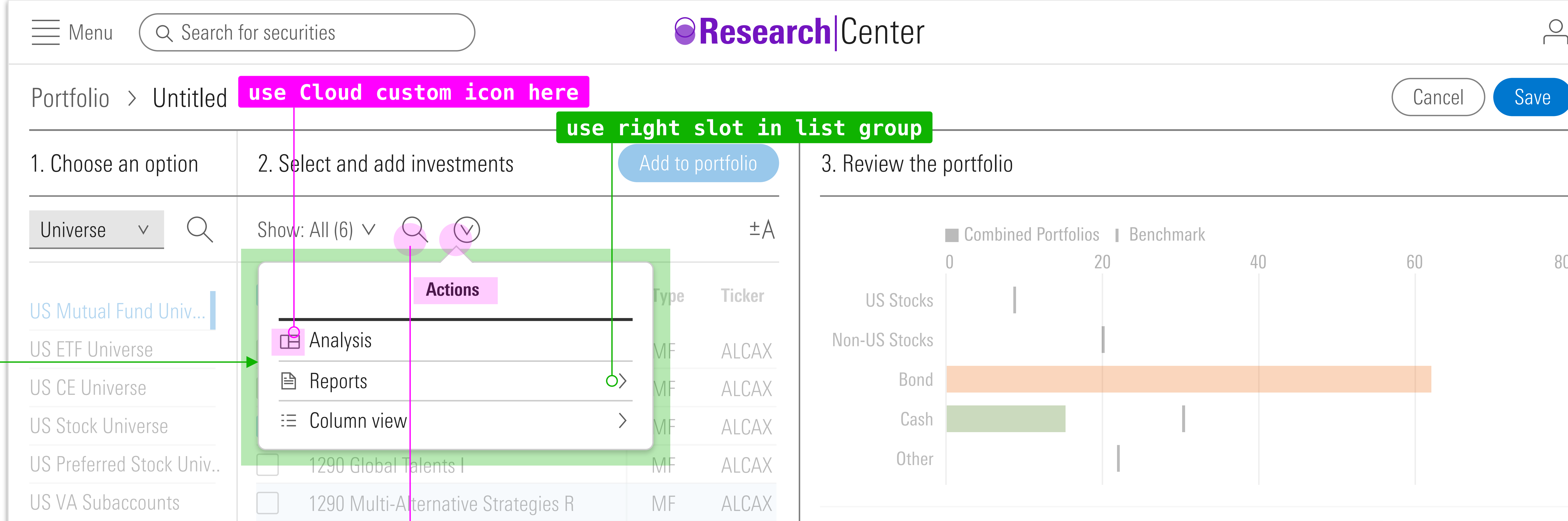


**Toolbar w [Portfolio] Creation,
3 Step Panels**

- Updated header
- Updated all toolbar heights to 49px (50px including bottom borders)
- Updated toolbar within grid: 'Analysis' and 'Reports' and 'Column view: NAME' are now rolled up into the 'Actions' icon.

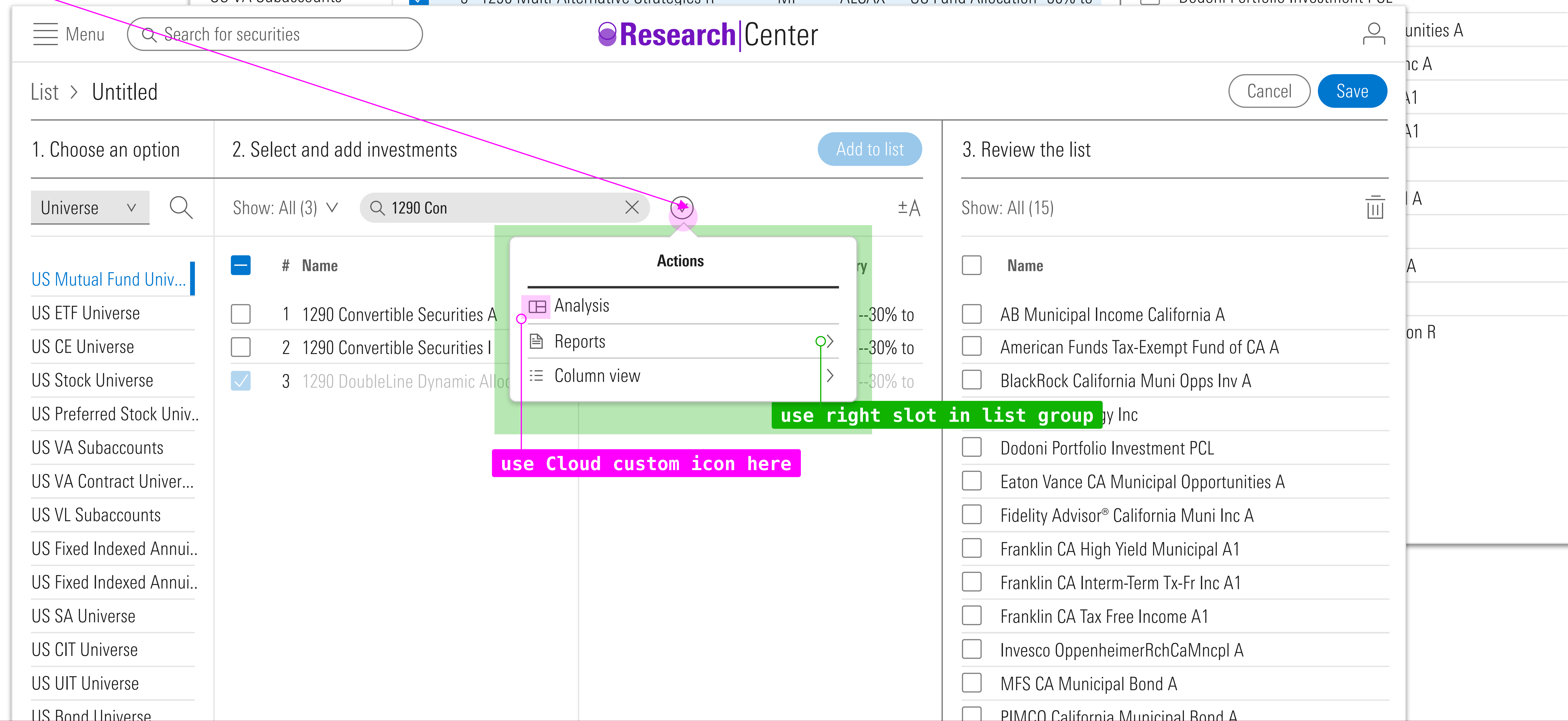
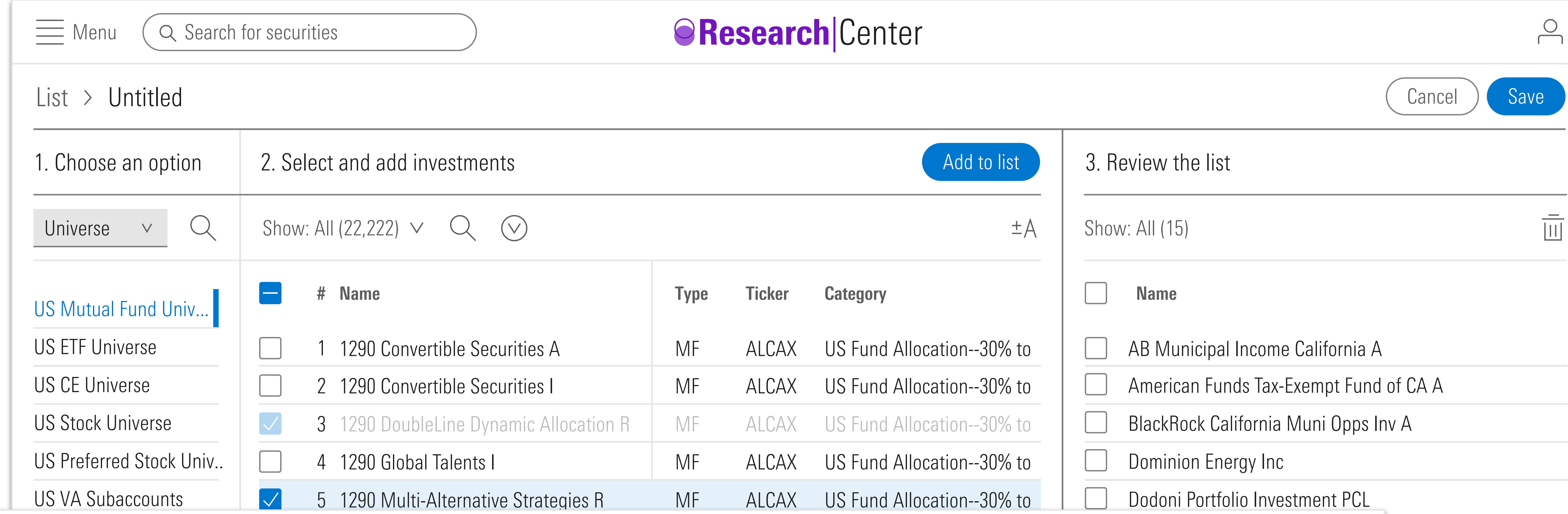
ADDED:
mds-list-group with-icon

THIS TREATS THE GRID AS ≤768PX
(when in panel 2 treatment)



Toolbar w. [List] Creation, 3 Step Panels

- Updated header
 - Updated all toolbar heights to 49px (50px including bottom borders)
 - Updated toolbar within grid: 'Analysis', 'Reports' and 'Column View' are now rolled up into the 'Actions' icon as a menu.
- THIS TREATS THE GRID AS ≤768PX (when in panel 2 treatment)



Toolbar w. Column View

Grid:

- Updated header
- Updated all toolbar heights to 49px (50px including bottom borders)
- Updated toolbar within grid: **There are no actions except 'Locate' when column view editing is open**

Column View panel:

- Update header: 49px
- Update toolbar (selection/sort UI) to **proper height and default icon sizes.**

