Primary Toolbar & Framework Spec



H1 & Toolbar Pt 1

Applied to all instances





H1 & Toolbar Pt 2

Applied to all instances



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

Menu Q Search for securities		Research Center	
Lists > Detailed List View 🖌			
Show: All (5) \checkmark Q Locate by name or ticker	\mathbf{r}		
<pre>\$mds-border-control</pre>			
		<pre>\$mds-border-separator</pre>	

Toolbar in Context: Anaylsis Object Creation/Edit Column View Edit



Toolbar w. Grid Only

(This is a List)

Note: Q --> Q Locate by name or ticker

- `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

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

Search expansion pushes other icons

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	MF			US Fund Muni California Interr
OD	MF	11/30/2019	04/22/2019	US Fund Muni California Long
ACAX	MF			US Fund Muni California Long

Toolbar w. Grid Only (This is a List) Responsive

Grid:

WHEN THE GRID IS ≤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 repsonsive to the available space, up to 250px. Leave <mark>\$mds-space-2-x</mark> 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

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SEE MENU POPOVER STRUCTURE ON THIS PAGE



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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

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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)

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Research Center

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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)



Research Center

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Research Center

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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.

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Research Center

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