

Customize the Grid and Board Display

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Overview

You can customize the data and style of the case management boards and grids. Managers and team leaders use the boards and grids to execute allocation and assignment decisions. In some cases, the necessary information is stored in one of the process variables that dynamically changes as the process progresses, for example Case Urgency or Case Cost. To propagate this information to managers and leaders, you need to change the data display in the tile.

Templates

Creating custom templates prevents losing any changes made to the tile display templates on system upgrade.

The following folders contain templates that enable you to change the appearance of the grid and board controls.

~\Shared Resources\Components\Flowtime\Templates

- CaseMessages
- ProcessInstances
- ProcessTasks
- Search
- UserInstances

~\Shared Resources\Components\HotOperations\Flowtime\Templates

- OpsManager
- TeamLeader
- TeamMember
- default.html

Board display customization

You can edit the default.html file to customize the board bucket item. For example, change its layout or content by adding a variable.

For the boards template customization, assign the custom `default.html` file to the HotOperations board display.

1. Duplicate the tile configuration `default.html` file and modify as necessary.
2. Add the modified `default.html` file path to the relevant application variable.

For example:

Value for the Portal.HotOperations.Board.BucketTileTemplate.TeamLeader:

~\Shared

Resources\Components\HotOperations\Flowtime\templates\TeamLeader\modifieddefault.html

Grid layout customization

You can customize the layout of the grids that support Tile display in the following HTML files:

- **grid-tile.html**: Configure the layout and appearance of the collapsed tile.
- **grid-expanded-tile.html**: Configure the layout and appearance of the expanded tile.

Component	File location
Portal	[rootfolder]\Cora SeQuence\Flowtime\Shared Resources\Components\Flowtime\Templates\ProcessTasks
Case Management (Hot Operations)	[rootfolder]\Cora SeQuence\Flowtime\Shared Resources\Components\HotOperations\Flowtime\Templates\TeamMember [rootfolder]\Cora SeQuence\Flowtime\Shared Resources\Components\HotOperations\Flowtime\Templates\OpsManager [rootfolder]\Cora SeQuence\Flowtime\Shared Resources\Components\HotOperations\Flowtime\Templates\TeamLeader [rootfolder]\Cora SeQuence\Flowtime\Shared Resources\Components\HotOperations\Flowtime\Templates\SearchResults

Board and grid display application variables

You can set up application variables to avoid losing any changes made to the tile display templates when the system is upgraded. Application variables are stored in the database and define the path of the tile display template.

NOTE

The following application variables are valid from V9.2–10.x.

Application variables list	Application variables list for Hot Operations
<ul style="list-style-type: none"> • Portal.Grid.TileTemplate.ProcessInstances* • Portal.Grid.ExpandedTileTemplate.ProcessInstances* • Portal.Grid.TileTemplate.UserInstances* • Portal.Grid.TileTemplate.SearchResults • Portal.Grid.ExpandedTileTemplate.SearchResults • Portal.Grid.ExpandedTileTemplate.UserInstances** 	<ul style="list-style-type: none"> • Portal.HotOperations.Grid.TileTemplate.OpsManager • Portal.HotOperations.Grid.ExpandedTileTemplate.OpsManager • Portal.HotOperations.Grid.TileTemplate.TeamLeader • Portal.HotOperations.Grid.ExpandedTileTemplate.TeamLeader • Portal.HotOperations.Grid.TileTemplate.TeamMember • Portal.HotOperations.Grid.ExpandedTileTemplate.TeamMember • Portal.HotOperations.Board.BucketTileTemplate.OpsManager • Portal.HotOperations.Board.BucketTileTemplate.TeamLeader

*ProcessInstances: Used for the instances grid of a specific workflow (In the portal, go to All Cases and then select a specific workflow.)

**UserInstances: Used for the *Cases I Started* grid

For example, the path to the template of the Team Member grid:

~\Shared Resources\Components\HotOperations\Flowtime\Templates\TeamMember\MYgrid-tile.html

For more details, see [this article](#).

NOTE

As default files are overwritten with every upgrade, create a custom template based on the HTML files provided.

Example of customized tile on the portal site (collapsed)

ID	Owned By	Stage	Updated	Completed	Created	G_Case Effort	Case Importance	scmCaseDueDate	Case Title
2148676032	Chana Raizner	Pending	7/6/2022		7/6/2022	30	<input checked="" type="checkbox"/>	7/6/2022	2148676032
2148676031	Rami Shalhavi	Pending	7/6/2022		7/6/2022	30	<input checked="" type="checkbox"/>	7/6/2022	2148676031
2148676030	Guy Greenspan	Pending	7/6/2022		7/6/2022	30	<input checked="" type="checkbox"/>	7/6/2022	2148676030
2148676029	Global Administrator	Pending	7/6/2022		7/6/2022	30	<input checked="" type="checkbox"/>	7/6/2022	2148676029

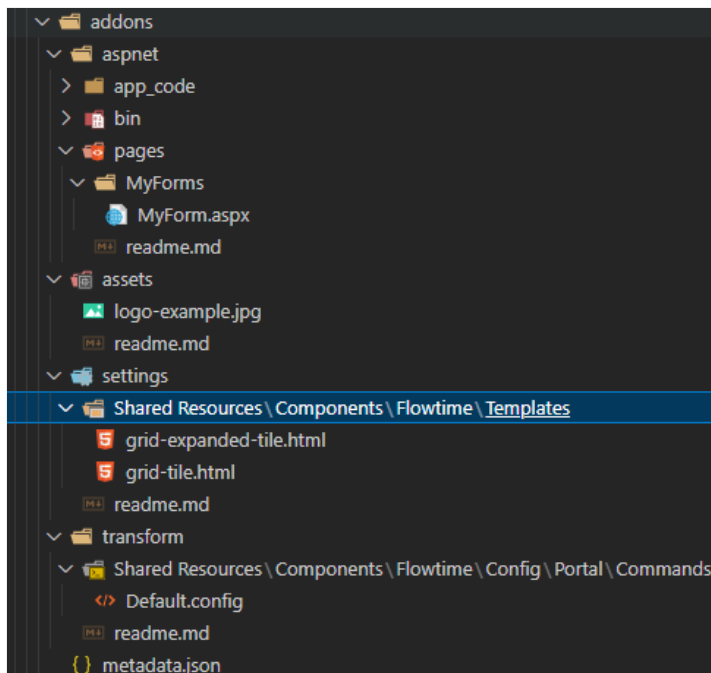
Example of customized tile on the portal site (expanded)

ID	Case Name	Stage	Updated	Completed	Created	G_Case Effort	Case Importance	scmCaseDueDate	Case Title
2148676035	I@hot_operation_elastic...2	Pending	7/7/2022		7/7/2022				
Archiving Filter 1: Archiving Filter 3: test nl:									
2148676034	I@rakesh...te	Pending	7/7/2022		7/7/2022				

Deploy the customization

Make sure that you deploy the board and grid customization via the project template **only** as described in the [Template Project for Portal Customization](#).

1. Add your customized templates to the **Settings** folder as shown in the image.



2. Run the **oneClick_Custom_Local.ps1** or the **fast_Deploy_Local.ps1** functions accordingly.

For more details, see [this article](#).