

Feature Guide:

How to Set Up UI Display Hierarchies



ONPOINT

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Introduction

OnPoint has developed the Display Hierarchy feature to more easily support a customer’s need to display content in a hierarchical structure in custom portals and mobile UIs, alleviating the need for OnPoint to create hard coded custom content lists. Using this feature gives customers complete flexibility within a custom UI or custom portal to manage the tree structure, select what content is displayed at each level, make changes to the structure and deploy the updated UI/Portal to users at any time without assistance from OnPoint’s design team.

- Note:** This feature requires a custom mobile UI or custom Portal.
- Note:** Throughout this guide we refer to the ‘Assign/Unassign’ function to “associate” selections with the hierarchical display. You are only instructing the “display” of the UI lists, not actually “assigning” any content to users.

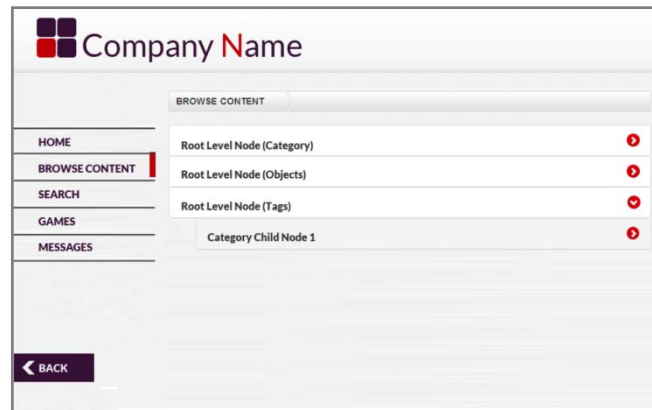


Figure 1 – Sample User View - Custom UI Hierarchy

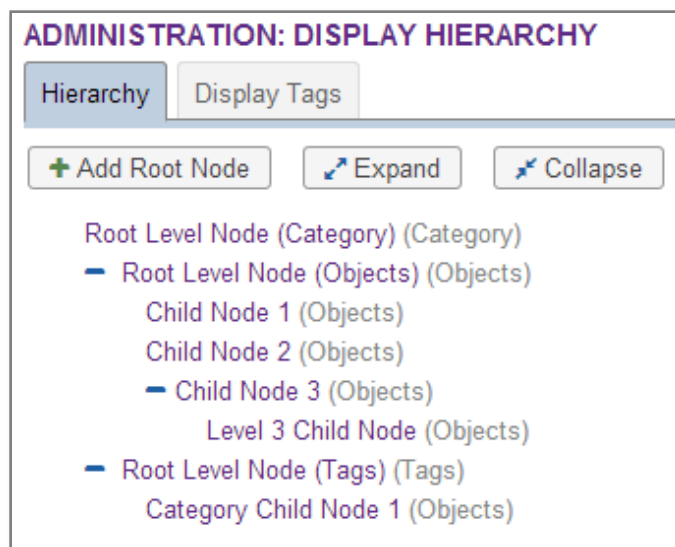


Figure 2 – Administrator View – Display Hierarchy

Section 1: Creating a Root Node

Step 1. Log in to the OnPoint LMS as a Site Administrator or higher and navigate to Course Manager.

Step 2. Go to Administration -> Display Hierarchy.



Figure 3

Step 3. Click the Add Root Node button to create your first level.

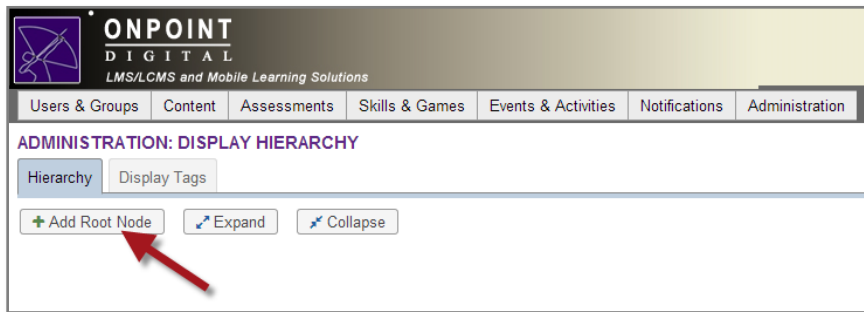


Figure 4

Step 4. Enter the Name of the Node. This information will be displayed to end users.

Step 5. Select the Node Type. Choices are:

- a. **Objects.** This selection allows you to add any unique objects (Courses, Nuggets, Assessment Sets, Skill Profiles, Events, or Activities) to this Node. See Section 2 for more information.

Note: The Object-based Nodes are the only type that allows an Administrator to sequence the display of the content in the Node. All other types sequence content alphabetically.

- b. **Category.** This selection allows you to select all content from one or more system categories to display under the Node. See Section 2 for more information.

Note: A benefit of the Category-based Node is that any new content that is published in the selected category(ies) is automatically displayed to users without the Administrator needing to update the hierarchy in any way. Be aware that this can lead to content being unintentionally displayed to users in a multi-author environment.

- c. **Tags.** This selection allows you to display content from one or more Hierarchy Tags that you have previously established and associated at the content level. See Section 2 for more information on assigning content by Hierarchy Tag. See Section 6 for details on creating Hierarchy Tags at the content level.

CONTENT: EDIT HIERARCHY

Node Title: Root Level Node (Objects)

Node Type: Objects

Sequence: 10 (parent node)

Save

Objects

Category

Tags

Figure 5

- Step 6.** Set the Sequence. Since this is the first node, we will leave this at the default '10'. However, you can use the Sequence field to reorder nodes when you have more than one node created. For example, if I wish to create a Node between two existing Nodes whose Sequences are 10 and 20, respectively, I would set the Sequence to be 15 for the Node I wish to place between them.
- Step 7.** Click **Save** to return to the **Content: Hierarchy** screen.

Section 2: Associating Content with a Node

2.1 Associating Content by Object

If you selected 'Objects' for the Node type in Section 1, Step 1, you will see a list of available content items in the 'Available Items' area on the right side of the screen. Follow the steps below to select the content you wish to display in the Node.

- Step 1.** Click on the appropriate content type tab (Courses, Assessment Sets, Skill Profiles, Events, Activities or Games) under the Available Items area on the right. Use the available filters (Name, Meta Tag or Category) to help you locate the content you wish to add. Click the checkbox for any items within the resulting list, and then click the **Assign/Unassign** button to add your selection(s) to the Assigned Items on the left. Repeat this process for all required object types until you have all items you wish to display in this Node in the list of Assigned Items list on the left.

Note: You must click the Assign/Unassign button for any checked items on the current Content tab before selecting content from a different content tab. Your checked selections are not saved when navigating between content tabs.

You can unassign any items from the list by selecting them from the list of Assigned Items on the left and then clicking the **Assign/Unassign** button to remove them.

Tip: It is best to make these actions separate tasks versus trying to assign and unassign items simultaneously.

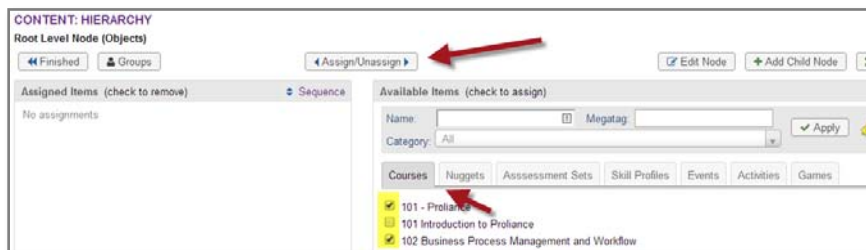


Figure 6

- Step 2.** You can set the sequence of the content in the node by selecting the [Sequence](#) link in the Assigned Items area and using the arrows to move your content items up or down in the list. Click the **Finished** button to return to the **Content: Hierarchy** screen.

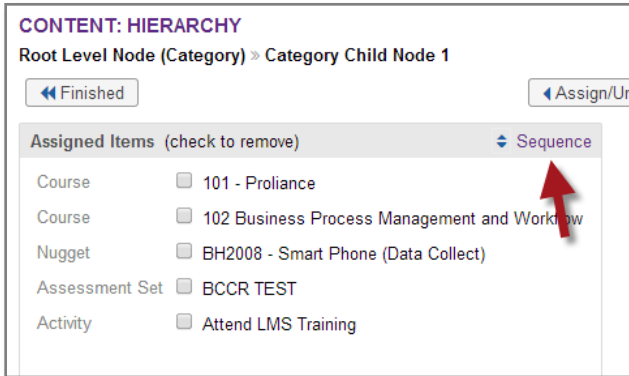


Figure 7

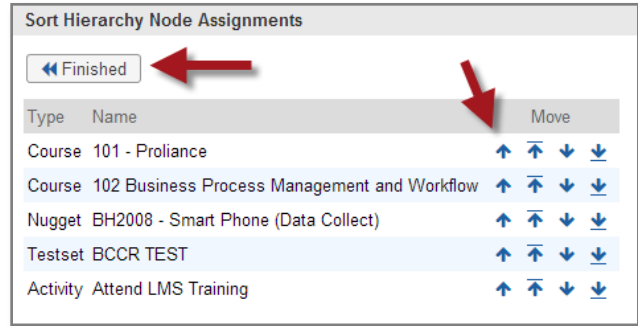


Figure 8

2.2 Associating Content by Category

If you selected 'Category' for the Node type in Section 1, Step 1, you will see a list of available categories in the 'Available Items' area on the right side of the screen. Follow the steps below to select the content you wish to display in the Node.

- Step 1.** Click the checkbox for any Categories you wish to add to the Node, and then click the Assign/Unassign button to add your selection(s) to the Assigned Items on the left. Use the available filters (Name, Meta Tag, and Category) to help you locate Categories in the list.

You can unassign any items from the list by selecting them from the list of Assigned Items on the left and then clicking the Assign/Unassign button to remove them.

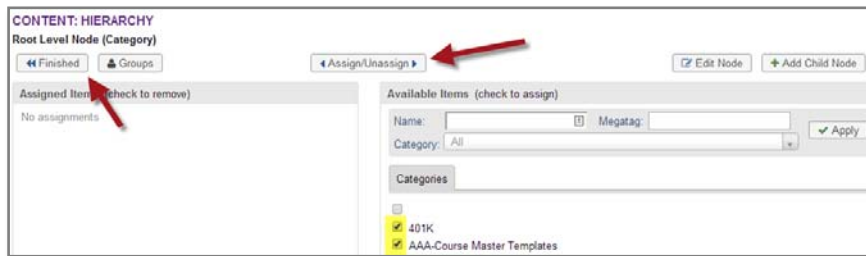


Figure 9

- Step 2.** Click the Finished button to return to the Content: Hierarchy screen.

2.3 Associating Content by Hierarchy Display Tag

If you selected 'Tags' for the Node type in Section 1, Step 1, you will see a list of all previously created Hierarchy Tags in the 'Available Items' area on the right side of the screen. Follow the steps below to select the content you wish to display in the Node. See Section 6 for information on creating and associating Display Tags with content.

- Step 1.** Click the checkbox for any tags you wish to add to the Node, and then click the Assign/Unassign button to add your selection(s) to the Assigned Items on the left. Use the Name filter if needed to help you locate Tags in the list.

- Step 2.** You can unassign any Tags from the list by selecting them from the list of Assigned Items on the left and then clicking the Assign/Unassign button to remove them.

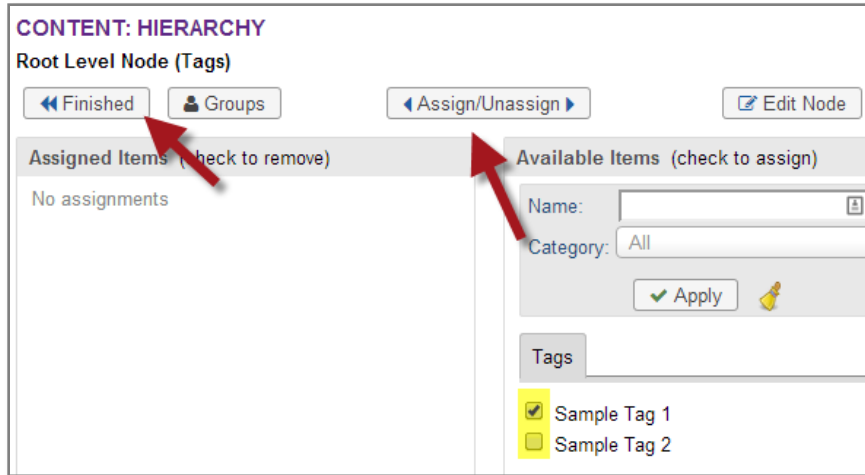


Figure 10

Step 3. Click the **Finished** button to return to the **Content: Hierarchy** screen.

Section 3: Creating a Child Node

Once you've created at least one Root Node, you can create 'Child' Nodes to begin to define your content tree structure. Follow the steps below to create a Child Node.

Step 1. Select a Root Node from the **Administration: Display Hierarchy** screen.

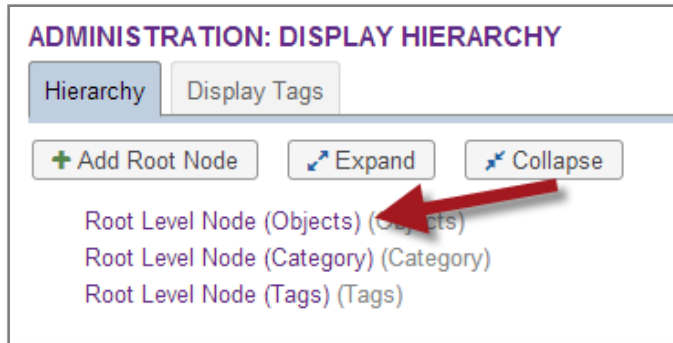


Figure 11

Step 2. Click the **Add Child Node** button at the top right.

Step 3. Follow the same steps you followed to create a Root Node (Section 1, Steps 4-7) to give the Node a name, determine the type of content you will display in the Node and to determine the sequence. Click **Save** to return to the **Administration: Display Hierarchy** screen.

Step 4. You will now see a **+** button next to the Root Node where you added the Child Node. Click the **+** button to expand the hierarchy and view your hierarchy levels.

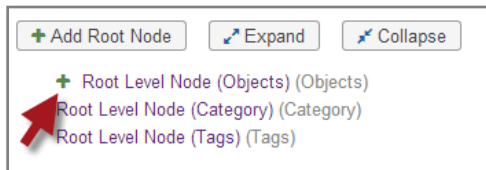


Figure 12

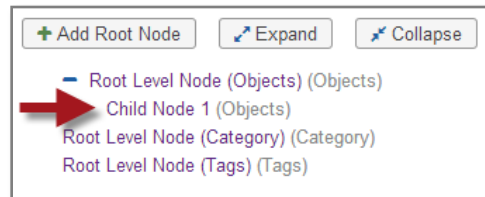


Figure 13

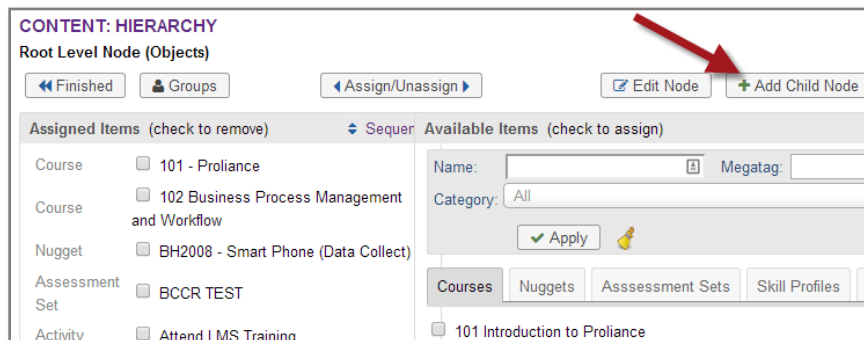


Figure 14

Step 5. Repeat Steps 1-4 at any level of the structure to create your desired hierarchy.

Section 4: Editing a Display Hierarchy

You may want to make changes to a Display Hierarchy you previously created. Follow the steps below to edit an existing Display Hierarchy.

- Step 1.** Select the Node you wish to edit from the **Administration: Display Hierarchy** page.
- Step 2.** You have the following options to modify the Node:

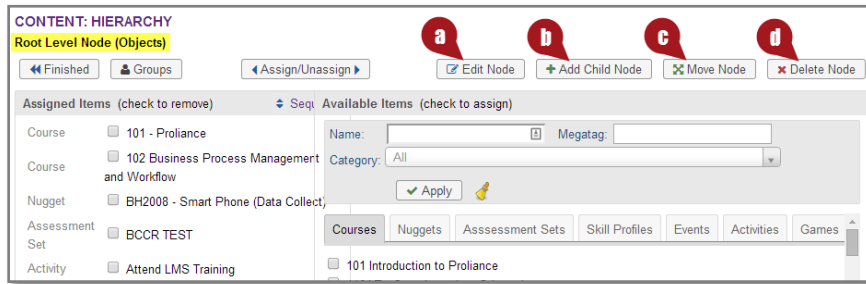


Figure 15

- a. Edit Node.** If you select the **Edit Node** button, you can change the Node name, the type of content that will be displayed in the Node (Objects/Category/Tags), and/or the Sequence (where the node falls in the list). If you change the type of content to be displayed in the Node after you already have assigned items, the items will be unassigned from the Node. See Section 1, Steps 4-7 for details about these fields.
- b. Add Child Node.** Follow the details in Section 3 on how to create a Child Node. If you are already on a Child Node, and add a Child Node, you will essentially be creating another level down in the hierarchy.
- c. Move Node.** If you select the **Move Node** button, you can reorganize the levels of the hierarchy. From the Node you are working in, select the **Move Node** button. On the next screen, you can use the **Up** and **Down** arrows to move the Node higher or lower at the same hierarchy level or you can click on any other Node to make it the *new* Parent Node of the current Node. See the example in Figure 16 below. Click the '**Root**' link at the top of the hierarchy to make the current Node a Root Level Node. Click the **Close** button at the bottom of the screen or the **X** button at the top right of the pop-up window to save your changes and return to the previous screen. Click **Finished** to return to the Display Hierarchy screen.

Note: The Move Node function revolves around the Node you are currently working in, which is displayed at the top of the screen and in all caps in the hierarchy for clarification.

EXAMPLE: In the example below, **Move Node** was selected from the 'Root Level Node (Objects)' Node. Clicking the 'Root Level Node (Tags)' Node set that Node to be the new Parent Node of the 'Root Level Node (Objects)' Node.

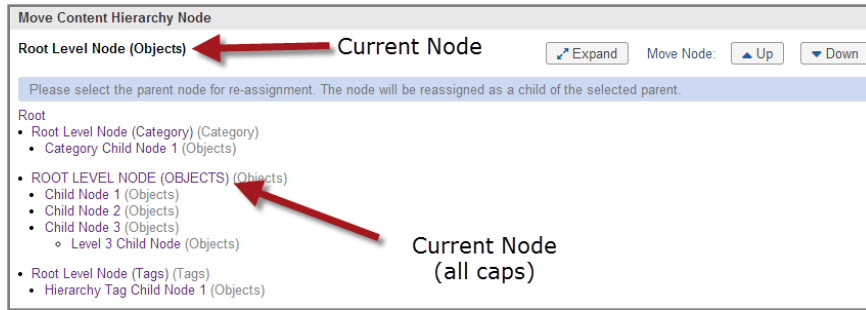


Figure 16

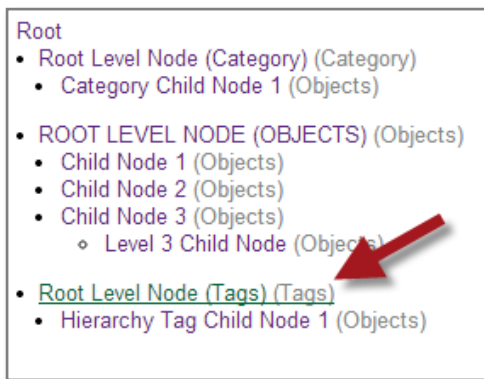


Figure 17

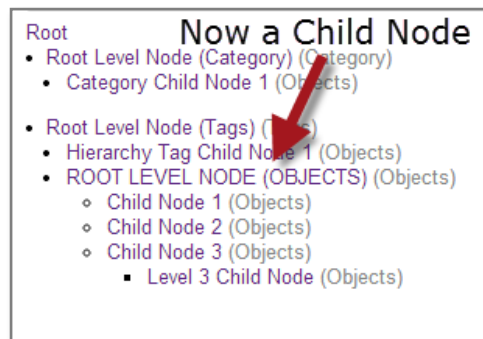


Figure 18

- d. **Delete Node.** To delete the current Node and any subnodes, click the **Delete Node** button, and then click **OK** on the pop-up confirmation screen (Figure 19 below).

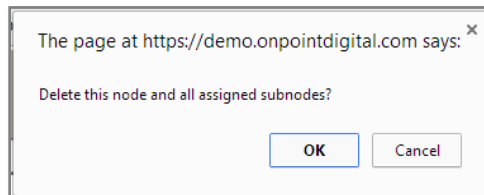


Figure 19

- Step 3.** After making your changes, click the **Increment** button on the **Administration: Display Hierarchy** screen to update the user view of the Hierarchy on the custom portal or custom mobile UI. A pop-up message will display, confirming your decision. If you click OK, you'll notice that the Version number in the top right will be increased by 1.

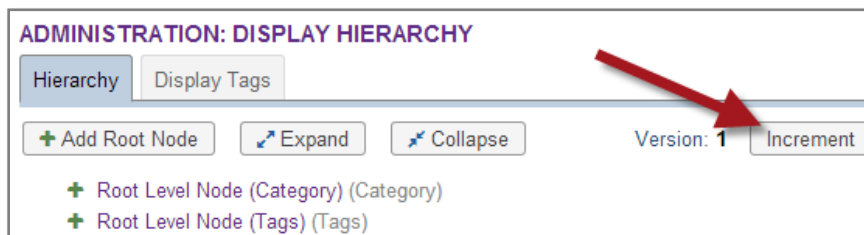


Figure 20

Section 5: Establishing Group Views

The Display Hierarchy allows you to establish group-specific views if you wish to limit who can see any/all of the hierarchy. By default, the Display Hierarchy will display to all users. To limit the views, follow the steps below.

- Step 1.** Select a Root Node from the Administration: Display Hierarchy.
- Step 2.** Select the **Groups** button. Select the checkbox(es) for the group(s) who should see this Node and all subnodes from the list of available groups on the right. Use the available filters (Name, Type) to help you locate Groups/Job Codes in the list. 'Type' options are Groups or Job Code. Click the **Assign/Unassign** button to add them to the list of Assigned Groups on the left. Click the **Finished** button to return to the previous screen.
- Step 3.** After making your changes, click the **Increment** button on the **Administration: Display Hierarchy** screen to update the user view of the Hierarchy on the custom portal or custom mobile UI.

| **Note:** Group views are set only at the highest level Nodes. |

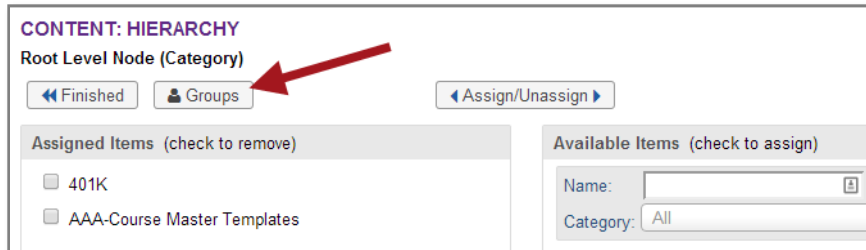


Figure 21

Section 6: Creating and Assigning Display Hierarchy Tags

One option for selecting which items will be displayed in a Hierarchy Node is to establish Display Tags and assign the tags to specific content to display in one or more Hierarchy Nodes. Follow the steps below to create the Display Tags and associate them with your content items.

6.1 Creating Display Tags

Step 1. On the Administration: Display Hierarchy screen, select the Display Tags tab.

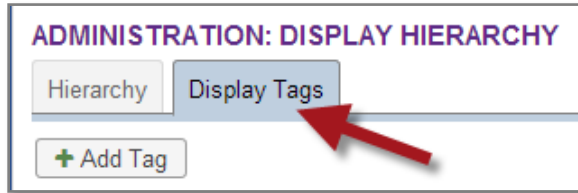


Figure 22

Step 2. Click the **Add Tag** button. Enter the Tag name and click **Save** to return to the previous screen.

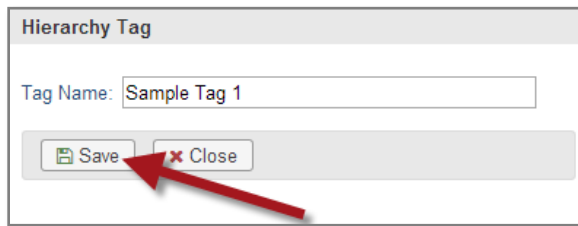


Figure 23

Step 3. Repeat Steps 1 and 2 to add as many tags as you require. All tags will be listed on the Display Tags tab.

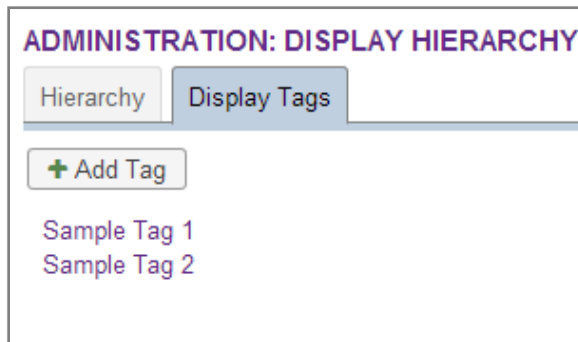


Figure 24

Step 4. To edit or delete a tag, click the name of the tag. You can change the name or delete it. Click **Save** to return to the previous screen.

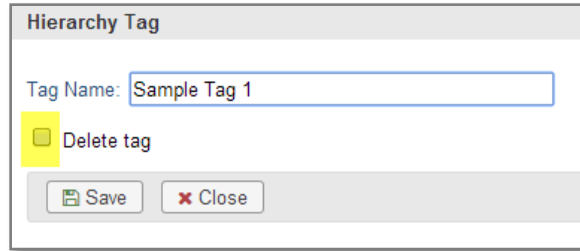


Figure 25

6.2 Assigning Display Tags to Content

- Step 1.** In Course Manager, navigate to the content item you wish to associate with a Display Tag. For the example below, we will associate the display tag with a Course.
- Step 2.** Go to the Advanced tab for the content item. You will see a Display Tags area on the right. Select the [Add Tag](#) link.



Figure 26

- Step 3.** Select a Tag from the drop-down list of available tags and click **Save** to return to the previous screen. Repeat the process to add additional display tags. To create new tags, see the 'Creating Display Tags' area of Section 6 above.

Note: You can associate a display tag with the following objects: Courses, Nuggets, Assessment Sets, Skill Profiles, and Events. Objects which cannot be associated with a display tag include: Activities, Forums and Games.

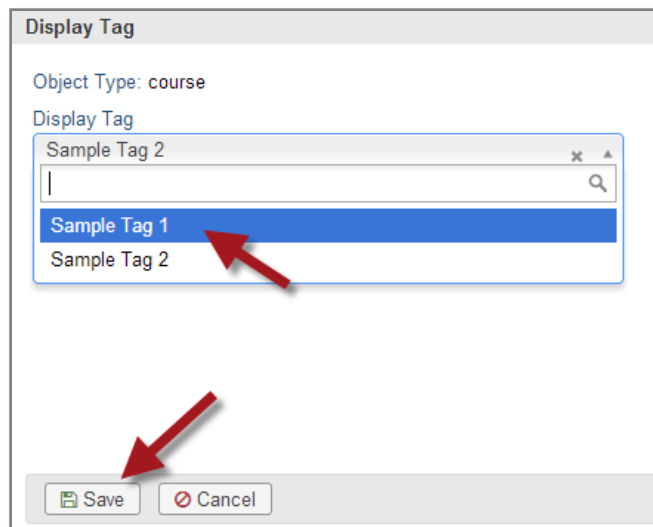


Figure 27

- Step 4.** Any Display Tags you associate with the content item will be listed in the Display Tags area of the Advanced Tab.



Figure 28

- Step 5.** To remove a Display Tab, select it from the list of assigned Display Tags and check the 'Delete Tag' checkbox. Click **Save** to return to the previous screen.

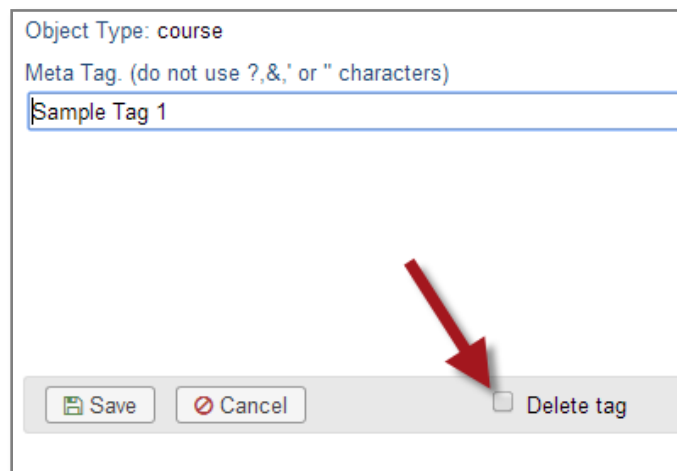


Figure 29

- Step 6.** For information on assigning content to a Display Hierarchy by Tag, see Section 2.

Note: Hierarchy tags allow Administrators to automatically include content in the Hierarchy without updating the Hierarchy by associating the Display Tag with the desired content. Hierarchy tags also alleviate the need to use Meta tags for content placement, allowing Meta tags to be used solely for searchability of content.