

Visual Action Platform

User Manual

Version 7.0



Visual Action Software, Inc.

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1 Overview

1.1 About the Visual Action Platform

Built on Visual Action's long-standing commitment to operational and process relevance, the Visual Action Platform 7.0 allows any type of user to work within a modular environment and tune the interface and logic to meet their own unique needs.

The Platform's modular user environment includes in-app access to suites of Workflow Extensions through a Workflow Extension Drawer.

The Visual Action Platform allows for tailored experiences by and for each user. The Platform enables users to control design, manage layout, and choose specific extensions from an array of Workflow Suites. Users may also tune their selected Workflow Extensions in entirely unique ways.

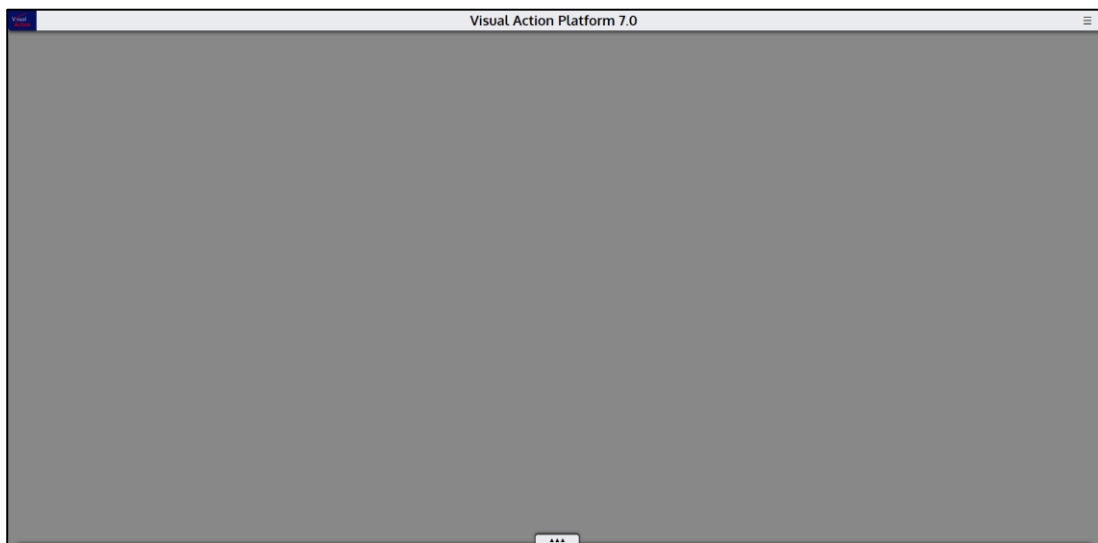
2 Platform Environment

2.1 Interface

The interface of the Visual Action Platform 7.0 is where most user actions are taken and where most control of an application is performed. The Visual Action Platform 7.0 is designed to allow most users to design and edit applications to their specific needs directly through the interface – without the need to dive deeper into technical configuration files or external programs.

2.2 Desktop

The Desktop is a large, open area on the screen in which a user may design and use an application. Some users may begin with a Desktop that has been preconfigured, while others beginning with a brand-new application will see a blank slate.



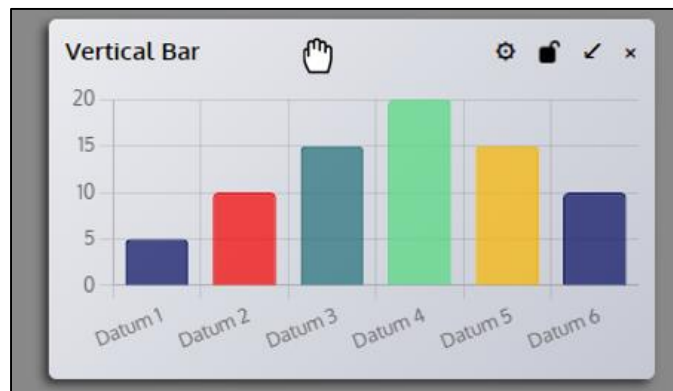
The graphic above shows an empty Desktop environment. All modifiable elements of an application that may be interacted with by a user will be laid out within this Desktop area. These elements are automatically contained within the usable Desktop environment; there is no need for the user to worry about designing an application with unreachable elements.

2.2.1 Interactions

Elements within the Desktop are interactive, allowing users to design and configure an application to their own specifications.

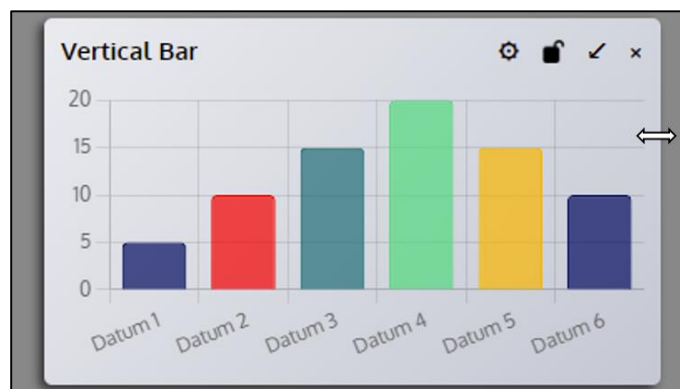
Dragging

Elements added to the Desktop can be moved freely by clicking and holding on the extension header (upper ribbon). Upon clicking and holding, a grabbing cursor will appear, meaning the element can be dragged to the desired location. Releasing the mouse will leave the element placed in its new location.



Resizing

Elements on the Desktop can also be freely resized. While hovering over the outer edges of an element, directional arrows will appear, indicating in which direction(s) the element may be resized from that edge. When these arrows appear, clicking and dragging (without releasing the mouse) allows the user to transform the element to the desired shape and size in the applicable direction. Releasing the mouse will leave the element with its new size and shape.



The edges of an element allow it to be resized horizontally (left or right edge) or vertically (top or bottom) only. Corners allow the element to be resized in both directions simultaneously.

See section 3.8 Adding, Placing, Collapsing, and Removing Extensions for more details on all of the dynamic interactions and controls of elements and Workflow Extensions on the Desktop.

2.3 Navbar

The topmost element of the Visual Action Platform 7.0 interface is the Navigation Toolbar, or “Navbar.” The Navbar is always visible to the user, even in a brand-new application environment.



A Visual Action Platform 7.0 application’s Navbar initially includes four components:

2.3.1 Logos/Links

At the left of the Navbar, imported organization or project logos are displayed.



2.3.2 Application Title

The center of the Navbar contains the title of the currently open application. For new applications, this will default to “Visual Action Platform [version M.m].”

The title of an application can be edited right from within the Navbar. Simply click on the title text to allow editing.

Visual Action Platform 7.0 Application

My Operational Application

2.3.3 Supplemental Information and Utilities

The Navbar may also contain supplementary application information, such as live update statuses, timers, clocks, and more. By default, no supplementary elements are enabled.



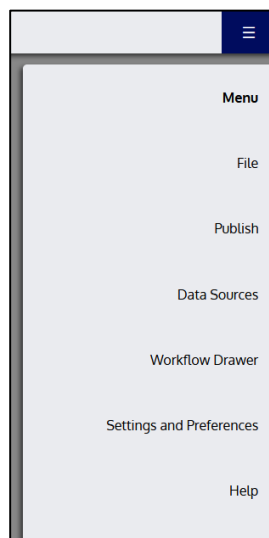
2.3.4 Menu Button

At the right of the Navbar is the Menu button, which opens the Platform Menu containing the general utilities for managing settings, applications, and more. The Menu is described in further detail in the next section (2.4 Menu).



2.4 Menu

The Menu provides access to all of the Platform's controls. For many overarching functions and settings within the Platform, the Menu is the place to begin.



To open the Menu, click the Menu button in the upper right of the Navbar.

2.4.1 Menu Items

Once opened, the Menu contains many choices. The table below describes each of those choices and indicates whether or not the option is available in a published application.

Menu Item	Description	Available in Published Apps
Dropdown Item		
File ↓	Reveals options related to saving, opening, and creating applications.	Yes (Partially)
Save	Saves the current application under the last-used file name. If the application hasn't yet been "saved as," this will initially prompt for a file name.	No
Save As	Saves the current application with the ability to set the file name. Location will be automatic, unless your browser settings allow you to choose where to save downloaded files.	No
Open	Opens an existing application.	Yes
New/Clear	Begins a new application and clears the current working Platform environment.	No
Publish	Initiates the export of a published version of the current application.	No
Data Sources	Opens the Data Source management utility, where Data Sources can be created, edited, and loaded.	No
Workflow Drawer	Toggles the Workflow Extension Drawer. This is an alternative to the pull-tab of the Drawer at the bottom of the screen.	No
Settings and Preferences	Opens the application's Settings and Preferences in the Editor.	No
Help ↓	Links to resources for finding information and assistance with using the Platform.	Yes
User Manual	Opens an online PDF of the most current software documentation.	Yes
Contact Us	Takes you to www.visualaction.com/contact , where you can contact us for help.	Yes

2.5 Workflow Drawer

The Workflow Drawer houses all of the Workflow Extensions available for use within an application. The Workflow Drawer is the hub from which a user begins creating the interactive components of an application.



When designing an application, a user may select whichever Extensions are preferred from the Workflow Drawer to use within the application. There is no limit on the number of Extensions a user may add to an application, but it's important to keep in mind the usability of an application when deploying a large number of Extensions. Too many Extensions packed into a single interface may make it difficult to navigate an application. Try making multiple apps!

2.5.1 Opening and Closing

There are multiple ways to access the Workflow Drawer from within the Platform environment:

Pull Tab

While in Designer Mode, a small pull tab is always present at the bottom of the Desktop, in the center:



Clicking on this tab opens the Workflow Drawer. When the Drawer is open, clicking this tab will close the Drawer.

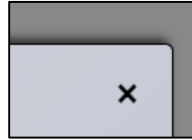
Menu

The Workflow Drawer can be toggled from within the Menu as well. Open the Menu and select "Workflow Drawer" (see section 2.4 Menu).

Shortcut

The Workflow Drawer can also be toggled using the keyboard shortcut `Ctrl + Alt + E`. See section 2.7.3 Keyboard Shortcuts (Keybinds) for more keyboard shortcuts.

The Workflow Drawer can always be closed by clicking the × button in the upper right corner of the Drawer when it is open.



The Workflow Drawer will automatically close after deploying a Workflow Extension or when another panel, such as the Editor, is opened.

The Workflow Drawer is disabled in published applications, meaning the above options for accessing it are also disabled. The pull tab will be hidden.

2.5.2 Navigating the Drawer

Once opened, the Workflow Drawer will present all of the Workflow Suites which are available to the user. Workflow Suites are available if there is at least one Extension within that Suite that is licensed for use.

A Note on the Licensing of Workflow Extensions

Workflow Extensions must be properly licensed before becoming available within an application.

Workflow Extensions are categorized into Suites, collections of Extensions of a similar type. Extensions are often licensed within entire Suites, but can be individually licensed as well.

When a Suite or Extension is licensed by you or your organization, the Extensions package available to your organization on the Visual Action downloads page will be updated with the appropriate files needed for use of the Extensions. The updated package must be downloaded and installed to make newly licensed Extensions or any updates to these Extensions available. Once properly installed, the Extensions will be available to all authorized users of the Visual Action Platform within your organization.

For more information or questions regarding Workflow Extension licensing, or to get more Extensions, please visit www.visualaction.com/contact/.

Begin by clicking on the Suite relevant to the type of Workflow Extension you need. For example, to add a Flaremap, click on the “Flaremap” Suite; to add a bar chart, click on the “Charting” Suite.

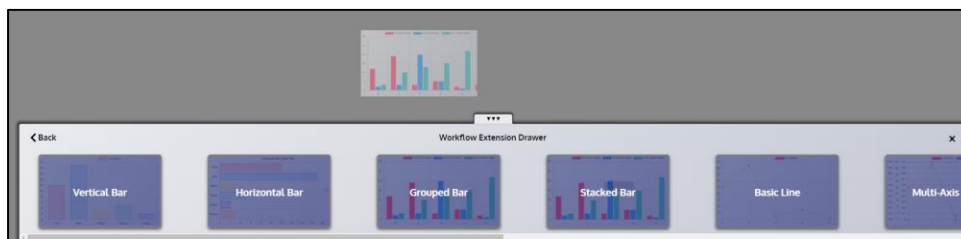


Once a Suite has been selected, the Workflow Drawer will populate with all of the available Workflow Extensions within that Suite.



2.5.3 Deploying Extensions

Once the Drawer has been populated with the contents of a Workflow Suite, locate the Extension you would like to add to the application. Once located, click and drag the Extension's card out of the Drawer and onto the Desktop environment. A "ghost" instance of the card will follow your mouse as you drag, indicating that the card has been grabbed. Move the cursor to a place relatively near where you would like the Extension to be, then release the mouse button. Upon releasing, a new instance of the selected Extension will be deployed to the interface.



Once deployed, the new Extension can be arranged and sized to best fit the interface as desired.

2.5.4 Getting More Extensions

In the Workflow Drawer, while looking at the available Suites of Workflow Extensions, a card titled "+ Get More Extensions" will always be available at the end of the row. Click

this card, or manually navigate to www.visualaction.com/contact/ to contact Visual Action about obtaining more Extensions. The “Contact Us” option under “Help” in the Menu will also take you to this page.

2.6 Editor

The Editor panel is the most dynamic and interactive panel in the Visual Action Platform. The Editor changes to include the modifiable settings for almost any editable component of an application, including Workflow Extensions, Application Settings, and User Preferences.

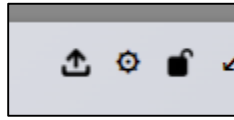


The Editor appears on the left edge of the screen. When clicking on a button that opens the settings for some application component, the Editor will automatically open to reveal the appropriate settings. The Editor can be closed by clicking the × button in the upper right corner. The Editor will automatically close if a conflicting panel, such as the Workflow Drawer, is opened.

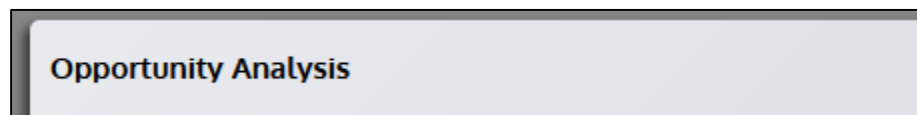
2.6.1 Workflow Extension Settings

Workflow Extension settings are likely what will be edited most often within the Editor. Each Workflow Extension developed within the Visual Action Platform, excluding a few special Extensions, has user-controlled settings that allow the user to make the

Extension look, feel, and function as desired. An individual Extension's settings may be accessed by clicking the gear icon (⚙️) in the upper right corner of the Extension.

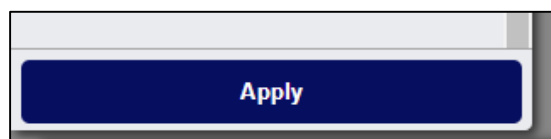


After clicking an Extension's settings (gear) icon, the Editor panel will open and/or update to reflect all of the available settings for that Extension which the user may modify. Except for a select few Extensions, the first setting will always be the Extension Name (the title shown within the header of the Extension).

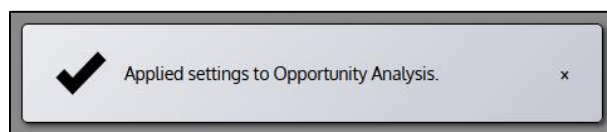


If the Extension has many settings, the panel will allow the user to scroll down to see all of the available options.

An "Apply" button is fixed at the bottom of the Editor panel. After making desired changes to an Extension's configuration, click this "Apply" button to execute the changes. The Workflow Extension whose settings are being modified will automatically update itself with its new settings.



NOTE: Certain settings changes may cause no visible changes to an Extension, and it therefore may be difficult to recognize that an Extension was successfully updated. A notification should appear in the bottom right corner of the interface indicating that an Extension's settings have been successfully updated.



NOTE: There is no "Apply" button when adjusting application settings and preferences. See the next section for more information.

2.6.2 Application Settings and Preferences

There are many settings and preferences for each application that may be controlled by the user. These can be accessed via the Menu, by clicking “Settings and Preferences.”

Once clicked, the Editor panel will open with all of the available options which a user may control. The user may make any desired changes; changes are automatically saved. There is no need to press an “Apply” button, as with Extension settings.

See section 3.7 Adjusting Settings and Preferences for further information on the available application settings and user preferences.

2.7 General

2.7.1 API Keys

Various Workflow Extensions require API keys to function. The specific documentation of a Workflow Extension will describe the key(s) you or your organization must possess for the Extension to function properly.

API keys are stored in a common file to make it easy to configure them once for all apps. This file only needs to be updated to add or change keys when keys are updated or new Extensions are licensed.

The key file is located in the Platform installation directory, under `/js/keys.js`.

NOTE: This is a slightly technical process. Do not edit this file if you are not sure what you are doing or if your organization has already set it up for you. **Do not** edit any portion of the file other than what is described below or inside a specific Workflow Extension’s documentation. **Do not** edit the filename.

This file may be edited with any text editor. It contains a simple JSON object named “APIKeys”. To insert your organization’s key, locate the identifier for the Workflow Extension(s) you are adding a key for. It will be to the left of a colon within all the data inside curly braces ({ }).

To the right of the colon next to that identifier, there will be double quotes. If they are empty, paste the key in-between the quotes. If there is an existing key, replace the entirety of it, within the quotes, with the new key. Quotes must remain present. Do not delete the comma after the end-quote. See the image below for an example of how one line should look when entering a key. The highlighted text shows where you would place your API key.

```
1 var APIKeys = {  
2   GoogleMaps: "[your_API_key]",  
3 }  
4
```

Your key file may contain more rows between the curly braces, depending on the Extensions you have licensed. Again, each Workflow Extension's documentation will specify what should be included in this file to achieve functionality.

2.7.2 Hover Info

There are various buttons and items within the Platform that do not have labels. They are described within this Manual, but while using the Platform, if you question what an item is, hover the cursor over the item for a second. A small box will appear with a label, indicating what the item is.

2.7.3 Keyboard Shortcuts (Keybinds)

To make interaction with the Platform most convenient for the user, various components may be accessed quickly using the keyboard shortcuts provided in the table below.

Component	Shortcut
Settings and Preferences	Ctrl + Alt + S
Menu	Ctrl + Alt + C
Workflow Drawer	Ctrl + Alt + E

3 Applications

This section details the creation of applications as well as many of the individual controls available to users while designing and using applications. The previous section intended to describe where components are found within the Platform, while this section will provide much more detail on the specific features and usage of those components, and is written from a training perspective.

3.1 Getting Started

Different users might begin their work on applications from different starting points. Use the sections below to guide you to the relevant starting point within this manual.

Creating a Brand-New Application

To begin a brand-new application from scratch, continue on to the next section, 3.2 Creating a Brand-New Application.

Be sure to have at least one data source available and accessible before continuing.

Beginning From a Template Application

If you are beginning from a Visual Action Template Application, continue to section 3.3 Beginning from a Template Application.

Be sure to have at least one data source available and accessible before continuing.

Editing an Existing Application

If you are editing an existing application, be sure you have an editable copy of the application (`.vas` file extension) and not a published version of the application (`.vap` file extension).

If you are editing an existing application that:

- might need to be reverted to its previous state,
- only needs temporary edits,
- has high importance to you and/or your organization,
- was not originally created by you, or

- needs to be preserved for any other reason,

please be absolutely sure you have your own **copy** of the editable version of the application, and not the only copy or the original copy. In other words, please make sure the original application is **backed up** before editing. Visual Action Software, Inc. is not responsible for the loss of applications due to overwriting, editing, or failure to back up.

Once you have your editable copy of the application, continue on to section 3.4

Editing an Existing Application. sections prior should be referenced if changes are needed to components of an application that are typically set at creation and often unchanged, such as the update interval for the data. This section assumes that most edits to existing applications involve Workflow Extensions.

3.2 Creating a Brand-New Application

If it's the first time you have used the Visual Action Platform on the device and browser you are using, it is likely you will by default be met with a blank, brand-new environment. Otherwise, the Platform attempts to load the most previously used application.



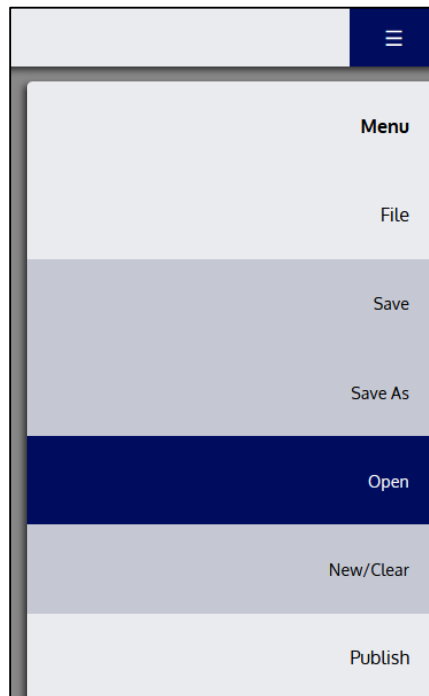
This can also happen if the browser's local storage was cleared or if some hardware or software event causes the Platform to be unable to read the data related to the previously used application.

In all other instances, an application likely exists in the environment when you navigate to the Platform. Use the Menu to select “File,” then “New/Clear” to clear the environment and create a new application. The Platform will prompt you for confirmation before resetting the Platform environment.

Once confirmed, the Platform will reset everything to a new application state, and it is ready for you to begin creating!

3.3 Beginning from a Template Application

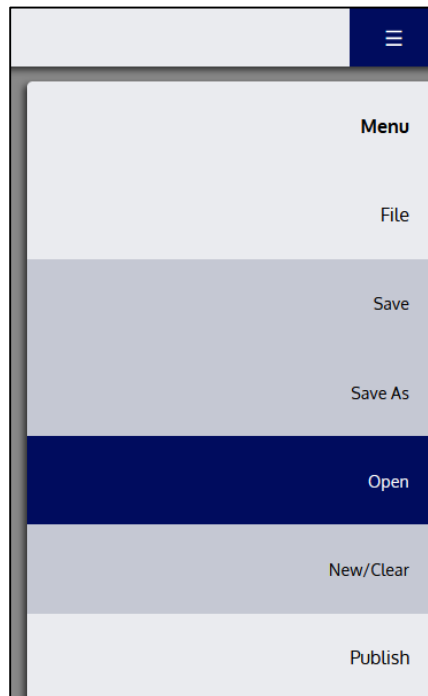
If you’re starting from a template application from Visual Action, begin by opening the template application file from within the Platform. Open the Menu, click “File” > “Open,” and locate the template file you were given.



The template application will load. Continue on to the next section to learn how to modify the existing components of the application.

3.4 Editing an Existing Application

If you want to make changes to an existing application, open the editable version of the application by opening the Menu and clicking “File” > “Open” and locating your `.vas` file for the application.



Once the Platform has loaded your application, continue on to section 3.8 Adding, Placing, Collapsing, and Removing Extensions. The sections between this one and section 3.8 Adding, Placing, Collapsing, and Removing Extensions will provide information you need to edit other components of an application, but this Manual assumes that the majority of edits made to existing applications are likely related to Workflow Extensions.

3.5 Naming the Application

Before diving into the bulk of creating an application, it's easy to initialize it by giving it its own title. New applications will begin with a default title of “Visual Action Platform 7.0.”

Visual Action Platform 7.0

To edit the title, locate the existing title in the center of the Navbar at the top of the screen. Hover over the title to see the cursor change, indicating that it may be edited as text, then click to reveal a text input box. Enter an appropriate name for your application, then click anywhere else on the interface to stop editing.

My Operational Application

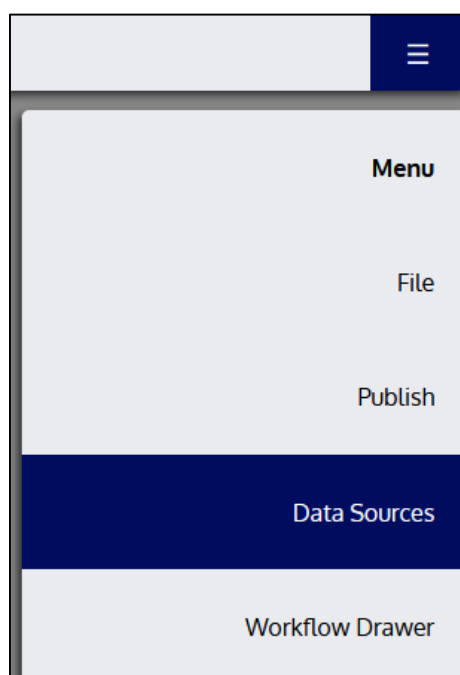
NOTE: Titles must have at least one character. If the title is left blank, the last remaining character in the text input box will be replaced.

If you need to edit the application's title later, or want to skip this step for now, this can always be done while in Designer Mode using the same procedure.

3.6 Connecting to Data

When beginning to build a new application, the most critical early step is to connect the application to at least one data source so you have some data to build your application around.

Start by opening the Menu and navigating to "Data Sources."



3.6.1 Data Sources

Depending on the data available from your organization, you may be met with an empty Data Sources container, or you might find that there are one or more cards already available to you based on your organization's configuration of data sources within the Platform. (Note: For security purposes, organizational data source sharing is not configurable by most users).

Column Name	Alias (friendly name)	Data Type	Primary Key
Sales_Rep	Sales Rep	TEXT	
Sales_Manager	Sales Manager	TEXT (ID)	
Sales_Region	Sales Region	TEXT (ID)	
Total_Sales_Qtr	Total Sales Qtr	NUMBER	
Quota_Qtr	Quota Qtr	NUMBER	
Quota_Percent	Quota Percent	NUMBER	

Databases and Common Data Sources

Connections to databases may only be set up by authorized users. If you are looking to access data from a database, your organization's technical team should have set up the necessary utilities to connect it to the Platform. Once set up, you will automatically see a Data Source card populate with the database in this section of the Platform.

Databases are just one type of common source that may be automatically available to you when using the Platform. Your organization's technical team may also make other types of data sources available by default. These will also automatically appear here.

If you would like to connect to:

- a data source not included by default by your organization
- your own data source,
- a file for testing, or
- any custom data file,

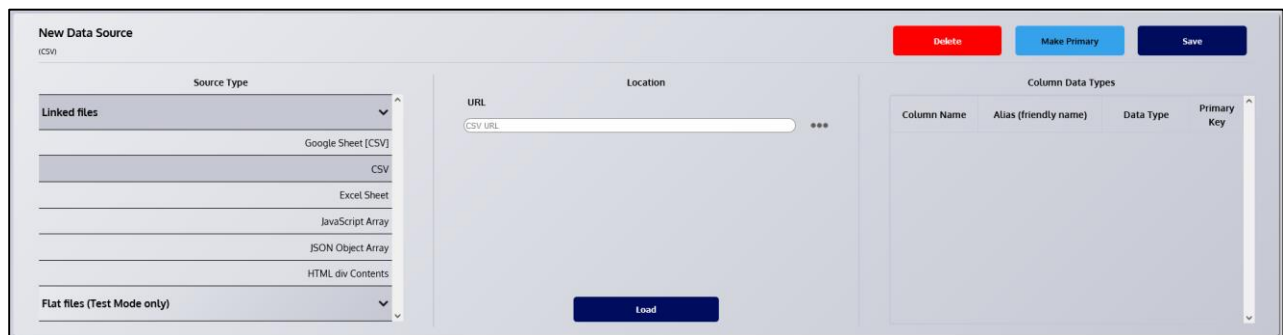
continue on to section 3.5.2 to learn how to add your own Data Source.

3.6.2 Creating a Data Source

To connect to a new Data Source that isn't already in your list of Data Sources, begin by clicking the "+ Add Data Source" button in the top center of the Data Sources screen.



A new Data Source card will appear and automatically be scrolled into view.



Begin by naming your Data Source, using the same method as used for the application title (click on the name, which by default is "New Data Source," to reveal a text editor into which you may enter a custom name).

Salesforce

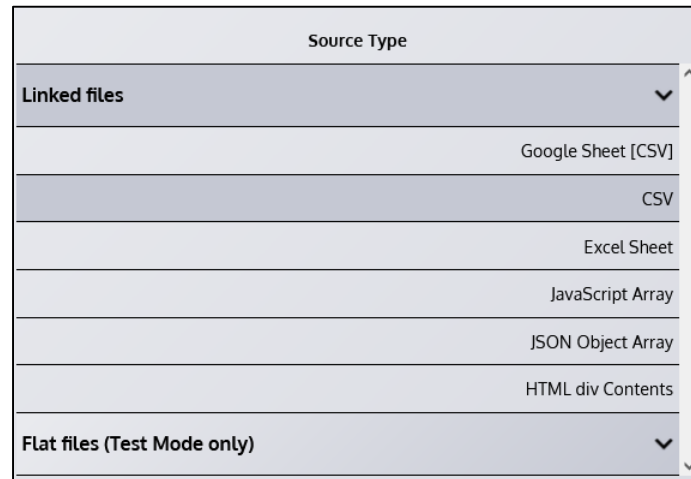
Salesforce

3.6.3 Connecting a Source to Data

After creating and naming your Data Source, the configuration details for that source are separated into three sections.

Source Type

The first and leftmost section of a Data Source card is the source type. This is where you can select the type of data file you will be connecting to.



The image shows a screenshot of a 'Source Type' dropdown menu. The menu is open, displaying a list of options. The first option is 'Linked files', which is highlighted in a darker shade. Below it are 'Google Sheet [CSV]', 'CSV', 'Excel Sheet', 'JavaScript Array', 'JSON Object Array', and 'HTML div Contents'. At the bottom of the list is 'Flat files (Test Mode only)', which is also highlighted. The menu has a scroll bar on the right side, indicating that there are more options available.

Source Type
Linked files
Google Sheet [CSV]
CSV
Excel Sheet
JavaScript Array
JSON Object Array
HTML div Contents
Flat files (Test Mode only)

The first option, "Linked files," is used most frequently. This is what you want to use in any situation other than during application design, when you might want to test out the app.

The second option, "Flat files (Test Mode only)," allows you to connect to a file from your local device to use within the application. However, this is only a test mode to be used to try out a data file or to test an application. Due to security restrictions, the Platform is not able to automatically reload a file from your local file system each time the application is refreshed, and thus the file will need to be reselected each time you open the app.

If you are ready to connect to the data file that will ultimately be used consistently with your application, always choose "Linked files."

If not already opened, select "Linked files" and choose your data file type from the dropdown Menu.

If you are using Test Mode, select "Flat files (Test Mode only)" and choose your data file type from the dropdown Menu.

NOTE: If you are connecting to data from a database, a Data Source card with the appropriate source type entered (for example, "Relational Databases") should have automatically appeared in the list of Data Sources. Due to security concerns, most users are not able to manually create a Data Source connected to

a database. If you do not see your database as a source, contact your organization’s technical team.

Location

The middle section of a Data Source card is where you point the Platform to your data source. Enter the URL leading to the data file you are using within the application. Be sure you are linking to a file of the type you chose in the previous section, or change the source type to the corresponding file type before loading. Also be sure to enter the file’s extension (for example, `.csv`, `.xlsx`, `.js`, etc.) when pointing to the file.

Location

URL

CSV URL

⋮

Load

If you are using Test Mode, a file browser will appear in this section rather than a URL input field. Select “Browse” and navigate to the file on your system. Select the file you want to use, then click “Open.”

PATH

Browse...

No file selected.

⋮

Once you have located your data, click “Load.” If the Platform is successfully able to access and load the data, the icon next to the input field will display a green check (red “x” on failure), and you will see the “Column Data Types” section populate to the right.

Load



Column Data Types

The rightmost and final section of a Data Source contains the column data types. Continue on to the next section for the details on configuring this section.

3.6.4 Configuring Data Columns

Once you have successfully loaded your data into the application, it's important to verify that each column of data is properly set up. The Platform will perform auto-detection when loading data, during which it will determine the column headers (names or keys) and make its best predictions as to an appropriate alias (friendly name) and data type for each column. It's important to review these before continuing to ensure that the Platform properly recognizes the type of each data and that the friendly names are something that the users of your application will recognize and understand.

When loading a data source, after clicking "Load" to fetch the data, you will see the rightmost section of the Data Source card populate with a table containing one row for each column from that data.

Column Data Types			
Column Name	Alias (friendly name)	Data Type	Primary Key
Sales_Rep	Sales Rep	TEXT	☒
Sales_Manager	Sales Manager	TEXT ENUM	☐
Sales_Region	Sales Region	TEXT ENUM	☐
Total_Sales_Q4	Total Sales Q4	NUMBER	☐
Quota_Q4	Quota Q4	NUMBER	☐
Quota_Percent	Quota Percent	NUMBER	☐

This table contains four columns:

Column Name

The column name is the identifier (header, key, etc.) for a column of the data. This comes directly from the data and is used to reference that data, and thus cannot be edited.

Alias (friendly name)

An alias, or a friendly name, is a name you may enter that is easier or more comfortable to read while using the application. For example, "Sales Rep" might be much more comfortable to read within an application than the actual column name in the data, "sales_rep". When you load your data, the Platform will do its best to automatically create an alias from each column name.

For each column in the data, you may enter any custom name you desire. Keep in mind that it may be best to use organizational terms that other users will understand if they are to use the application.

Data Type

The data type for each column tells the Platform what kind of information is contained in that column. There are four general types used in the Visual Action Platform:

Data Type	Description
TEXT	Regular text information in any format, typically without (many) repeats of the same value across multiple rows or which does not need to be categorized based on the value.
TEXT ENUM	Text data that is enumerable, meaning that there are repeats of values across multiple rows. This data type indicates that the text data in that column is not typically unique to each row, and is used for options that you would like to Group by in a Flaremap. Select this type if you have repeating text values in that data column.
NUMBER	Any purely numerical data.
DATE	Dates, which are text data formatted into any standardized date format.

It is very important to select the appropriate data type for each column. These can always be changed later, but it is very helpful in application design to ensure that data types are properly associated from the start.

The Platform will auto-detect data types for each column to the best of its ability, but you should check each column to verify that the data types are correct. If they are not, or you would like to make a custom change, select the appropriate data type from the dropdown list.

Primary Key

The Primary Key of the dataset is the column containing a unique, identifiable piece of information for each row in the data, such as an ID.

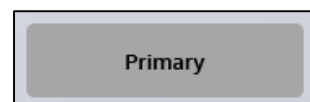
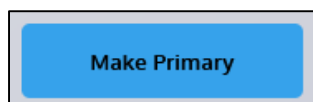
Be sure to check the radio button for the column name which is the Primary Key in your data.

Once you have changed and/or verified the information in the Column Data Types section, continue on to the next section to finish up your Data Source.

3.6.5 Finalizing a Data Source

Once you have completed the above process to set up your Data Source, it is almost ready for use.

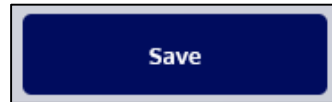
If you have multiple Data Sources connected to your application, and the Data Source you just created is the main one you would like to use, click the "Make Primary" button in the upper right corner of the Data Source card to set it as the primary Data Source. Once set as the primary, you will see the button disable and change to say "Primary."



Primary vs. Secondary Data Sources

In applications with multiple Data Sources, there is the notion of primary and secondary data sources. The primary data source will be used by default when deploying Workflow Extensions. To connect an Extension to a secondary data source, you must choose that data source within the Extension's settings.

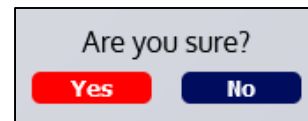
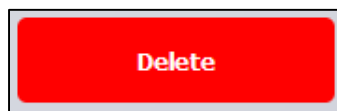
Click "Save" in the upper right corner of the Data Source card to finalize your Data Source. Once saved, you will see a notification indicating that the Data Source has been saved. When you see this notification, the Data Source is ready for use!



Close the Data Sources panel using the × in the upper right corner (or the Menu option) and continue on to section 3.7 Adjusting Settings and Preferences to set up the rest of your application, or repeat this process if you have other sources of data you would like to connect to.

3.6.6 Removing a Data Source

If you need to remove a Data Source for any reason, this can be done directly on the Data Source card. Simply click the "Delete" button in the upper right corner. You will be prompted to confirm deletion. Click "Yes" to confirm and remove the Data Source, or click "No" to cancel.

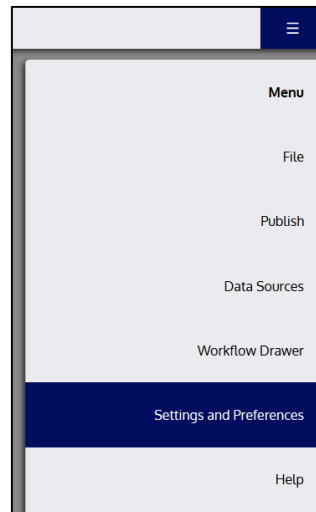


Databases and common Data Sources set up from your organization are always available, and therefore cannot be deleted.

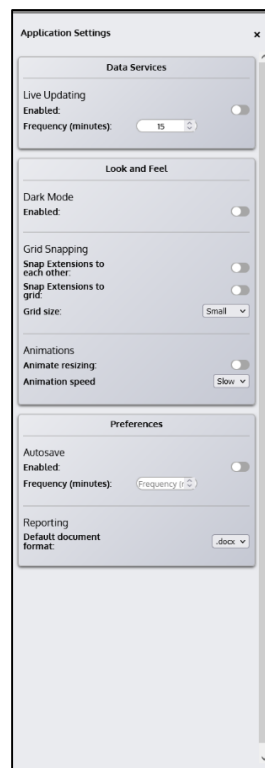
3.7 Adjusting Settings and Preferences

It's almost time to begin building your application, but there are some important and helpful options in the Settings and Preferences to be familiar with first. Some options do not need to be adjusted yet, but many may be useful to use during the design of your application.

Navigate to the Menu and click "Settings and Preferences."



The Editor panel will open to show you all the available controls you have over the application and its performance.



Adjust any desired settings and preferences to meet your needs. Use the information below as a reference for information about the function of the available options.

When complete, close the Editor panel by clicking the ✕ in the upper right corner of the panel. Changes to Settings and Preferences are automatically saved.

3.7.1 Data Services

Data Services contains controls that allow you to manage how the application handles data in the background.

Service	Option	Description
Live Updating	Enabled	Toggle switch indicating whether live updating should take place or not.
	Frequency (minutes)	Indicates how often the application should automatically check for data updates. Minimum of 1 minute.

3.7.2 Look and Feel

Look and Feel contains controls allowing you to set up the application however is most comfortable for you and its users to interact with it. This includes controls that make it more comfortable during editing as well as during usage.

Service	Option	Description
Dark Mode	Enabled	Toggle switch indicating whether to use the Dark Mode style for the application.
Grid Snapping	Snap Extensions to each other	Indicates whether to snap the edges of Extensions to each other when moving them around the Desktop.
	Snap Extensions to grid	Indicates whether to use an invisible grid to align Extensions when moving them around the Desktop. When off, Extensions move smoothly and freely.
	Grid size	Sets the (invisible) grid size to use when "Snap Extensions to grid" is enabled. There are three sizes: • Small (10px × 10px) • Medium (20px × 20px) • Large (30px × 30px) Clicking the dropdown for this option automatically enables "Snap Extensions to grid."
Animations	Animate resizing	Indicates whether to animate the resizing of Extensions. When disabled, Extensions move immediately with the mouse when resized, without smooth animations. Disabling animations can help with performance on slower machines.
	Animation speed	Sets the speed of the animation while resizing. There are two speeds: • Slow • Fast

3.7.3 Preferences

Preferences contains further preferences which do not have their own category.

Service	Option	Description
Autosave	Enabled	Toggle switch indicating whether the application should automatically save. NOTE: Applications auto-save within the browser whenever changes are made to avoid losing your work. This option is for auto-saving to a file for permanent storage.
	Frequency (minutes)	Indicates how often the application should automatically save itself to the last save location. Minimum of 1 minute.
Reporting	Default document format	Indicates the default file format to be used when generating reports. File format can always be changed when generating reports, but can save time during generation if a specific file type is typically used. Multiple standard formats are available: • Microsoft Word document (.docx) • Webpage (.html) • Portable Document Format (.pdf)

3.8 Adding, Placing, Collapsing, and Removing Extensions

Once you have at least one data source loaded into your application, you can start adding Extensions to the interface.

3.8.1 Adding Extensions

Begin by opening the Workflow Drawer using the pull tab at the bottom-center of the screen or one of the other methods mentioned in section 2.5 Workflow Drawer. Once the Drawer is open, locate the Suite from which you would like to deploy an Extension.

A Note on Extensions in this Manual

Often, the first element added to the interface is a Flaremap. Any Extension may be added at any time, but for the purposes of this Manual, we will begin with a Flaremap.

Locate the Extension you would like to add to the interface, then click and drag its card out onto the Desktop environment, releasing the mouse once you are near where you want the Extension. Upon mouse release, the Extension will immediately be deployed.

Repeat this process to add each Extension you would like to the interface, or continue on to the next section if you'd like to configure an Extension before adding more.

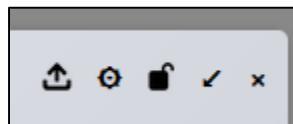
3.8.2 Placing Extensions

You can now drag the recently deployed Extension(s) around the interface by grabbing anywhere in its header. Using the edges of the Extension, you can also resize it. Move and resize your Extension to get the desired location and size. Extensions may always be moved and resized later, except in published apps. Oftentimes, after configuring your Extensions and adding more, you will need to readjust the placement and size of some of them.

If you've got your Extension placed and sized comfortably, you can lock it in place by clicking the  (lock) icon in the Extension's controls. This will prevent the Extension from being moved or resized. The icon will toggle to a closed lock to indicate that the Extension is locked.



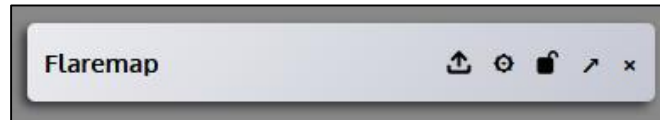
To unlock an Extension and allow it to be moved and resized again, simply click the  (lock) icon again (this will return the icon to an open lock).



If you've added multiple Extensions, repeat this process with each one to design an application layout that meets your needs.

3.8.3 Collapsing Extensions

Every Extension may also be collapsed (minimized) for convenience. This may be helpful when designing an application with many Extensions, or when actively using an application in Designer Mode. It can help users to have many Extensions configured and available, but kept nicely out of the way when not immediately needed.



To collapse (minimize) an Extension, click the ↵ (arrow) in the Extension controls. The Extension will collapse to the minimum width with only its header visible. To expand (maximize) an Extension, click the ↶ (reversed arrow) in the header.

All collapsed Extensions are the same size, making it convenient to stack and organize them.

3.8.4 Removing Extensions

If you no longer need an Extension, or accidentally added the wrong Extension to your interface, simply click the ✕ icon in the Extension controls to remove it.

3.9 Configuring Flaremaps and Extensions

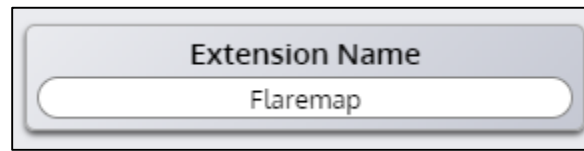
Almost every Workflow Extension has its own set of custom settings and controls which can be configured to tailor its performance to the user's needs.

To access a Workflow Extension's settings, click the ⚙ (gear) icon in the Extension's controls. This will open the Editor panel with the Extension's controls.



One common setting for most Extensions is the Extension name, which appears at the very top of its settings. Enter any name for the Extension, then click anywhere off of the input box. This

is the only Extension setting that automatically updates without pushing the “Apply” button at the bottom of the Editor panel.

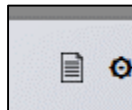


Navigate through the settings within the Editor panel to make the changes you need to the selected Extension.

Please note that this User Manual is for the Platform, and does not describe the individual controls available for each Extension. Read the box below for more information on where to find documentation on individual Extensions and their respective settings.

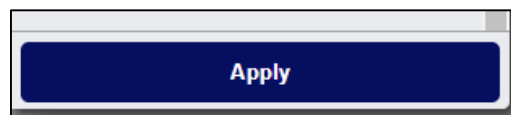
Workflow Extension Documentation

Because each Suite contains different Workflow Extensions, and because different users license different Extensions, documentation regarding the specific controls and usage of each Extension are separate from this User Manual. Documentation for each Extension is available on our website, and is quickly accessible through the Extension itself. Click on the (document) icon in the Extension header to open a tab directly to the documentation for the Extension you are using.



Please refer to the associated documentation of an Extension to get details on the specific controls and usage.

Click the “Apply” button, which is fixed to the bottom of the Editor panel while editing Extension settings, to apply the changes you’ve made. The Editor panel will remain open after clicking “Apply,” so you may iterate through multiple stages of edits to test out the Extension without having to reopen its settings each time.



Once you have modified your Extension as desired, close the Editor panel by clicking the × in the upper right corner of the panel. It will also close automatically if you open another conflicting panel, such as the Workflow Drawer.

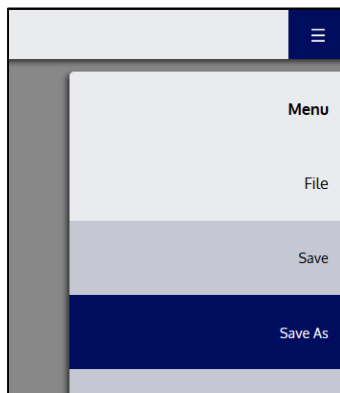
3.10 Saving an Application

Both during and after working on an application, you will want to be sure to save your work. As mentioned previously, regularly saved application files are editable applications. The next section (3.11 Publishing an Application) describes how to publish non-editable applications.

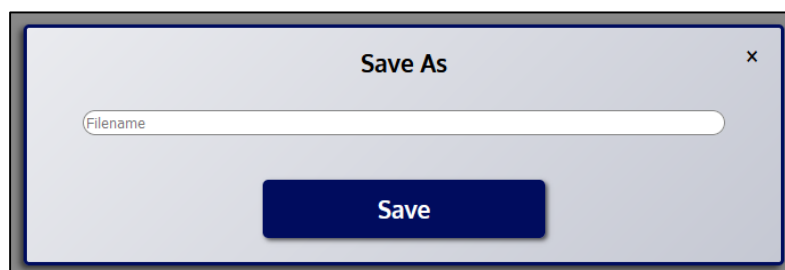
An Important Note on Saving Applications

This section is for saving your editable application to file as a backup, for editing later, for sharing, or for other reasons. Applications are automatically saved in the browser on a frequent basis while editing to ensure you do not lose your work; however, it is still very important that you save your own copy of your application somewhere safe. Should the browser storage get cleared for any reason (including resetting the Platform environment), the Platform will not be able to automatically recover your application, and you will need a saved copy of it.

There are two options in the Menu (under "File") for saving an application: "Save" and "Save As."



If it is your first time saving your application to file, click "Save As." A dialog box will appear and you will be prompted for a file name. Once you've entered the name you want to use, click the "Save" button. Depending on your browser settings, the file may immediately download to the automatic download location, or you may be prompted to choose where to save it.



If you would like to automatically save to the last file name you used, click “Save.” If you have not yet used the “Save As” option to name your file, you will first be taken to the “Save As” dialog box to enter a name. Following this, the “Save” option will automatically use the last name you used.

Depending on your browser settings, you may still be prompted to choose a location to save the file, even when using the quick “Save” option. This is a browser security option and cannot be overridden by the Platform.

NOTE: The Desktop environment will be disabled while the “Save As” dialog box is open.

To cancel saving (using “Save As”), click the ✕ in the upper right corner of the dialog box.

3.11 Publishing an Application

After you’ve completed designing an application, you may want to make it available for use without all of the controls of the Platform (non-editable). This can be accomplished by publishing an application.

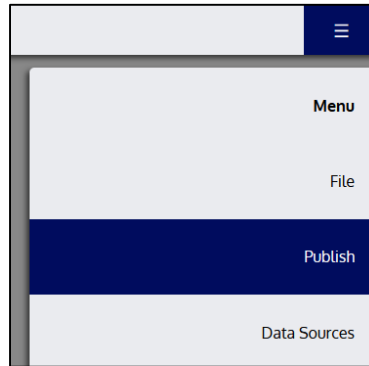
A published application contains all the Extensions and configurations of an application, while disabling the ability of the application to be modified in any way. This is called “Publish Mode,” as opposed to “Designer Mode,” which is the normal mode of the Platform in which all the controls and configurations for editing and application are available.

A Note About Published Applications

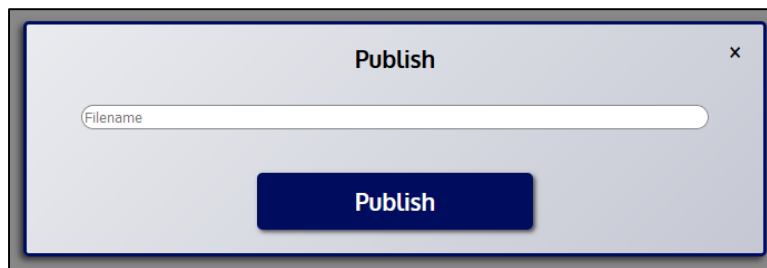
Published applications are a restricted form of application which allows users to interact with and use the application without being able to edit it. Applications are usable in both edit and publish modes, but published applications may be helpful for presentations or to prevent users from editing an application when not permitted or appropriate.

Published applications are still run within the Platform environment, and thus must still be accessed through a valid, licensed copy of the Platform.

To publish an application, open the Menu and click “Publish.”



This will prompt you to save the file in the same way the Platform would when clicking “Save As.” When publishing, however, you will notice that the file will save as a `.vap` file, rather than a `.vas` file. This indicates that this file is a published application that cannot be edited.



Enter a file name for the published app file, then click “Publish.” Depending on your browser settings, the file may immediately download to the automatic download location, or you may be prompted to choose where to save it. This is a browser security option and cannot be overridden by the Platform.

NOTE: The Desktop environment will be disabled while the “Publish” dialog box is open.

To cancel publishing, click the **x** in the upper right corner of the dialog box.

Open a published application the same way you would open any other application within the Platform. Open the Menu, click “File,” then “Open,” and choose your published application file.

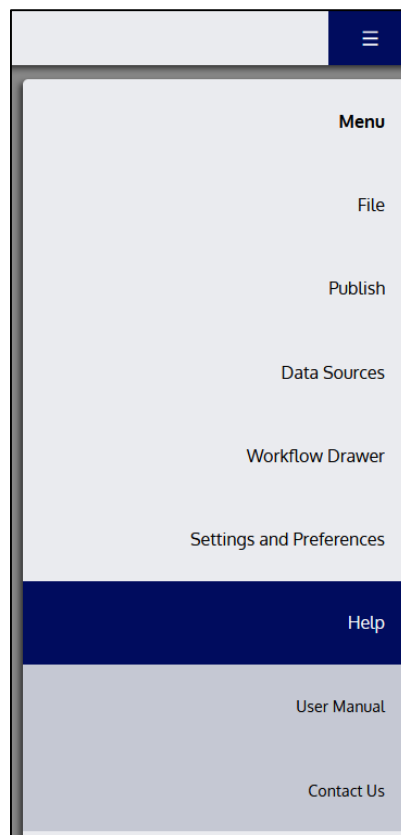
Once you choose to open a published application, the Platform will automatically detect that it is published and will put itself into Publish Mode. This will remove many options from the Menu which allow the application to be edited, as well as remove the Workflow Drawer and Editor panels. It will also restrict the ability to modify Data Source connections and the layout of the interface.

Once published, the application cannot be edited. To make changes to an application, use an editable (.vas) copy of the application that you saved while working on it. To republish an application, simply edit the editable copy of the application, then repeat the above process to republish the new version.

3.12 Getting Help

If you need any help while using the Visual Action Platform, there are many options available to you.

Open the Menu and click “Help” to view the in-Platform help options. The first option, “User Manual,” will open the most up-to-date version of this User Manual from the Visual Action website. If you are viewing this document digitally, you can also check for updated documentation by clicking [here](#).



If you need further assistance beyond what is offered by this User Manual or the documentation accompanying a Workflow Suite or Extensions, click “Contact Us,” or navigate directly to www.visualaction.com/contact, and use one of the available methods to get in touch

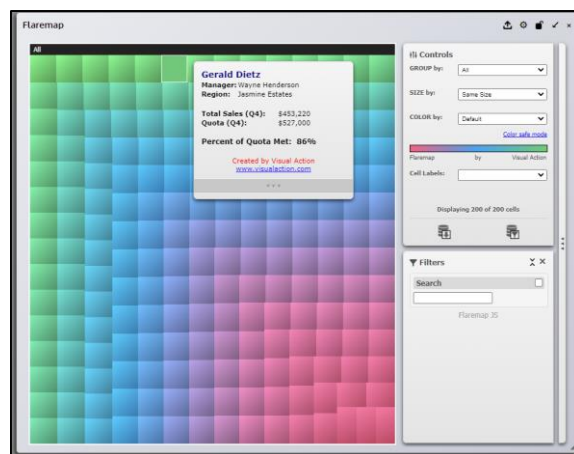
with us for help. You can also use the information contained in section [Contact to contact](#) us.

4 Flaremap

Flaremaps, powered by Flaremap JS 7.0, are the core of the operational analytics capabilities of the Visual Action Platform.

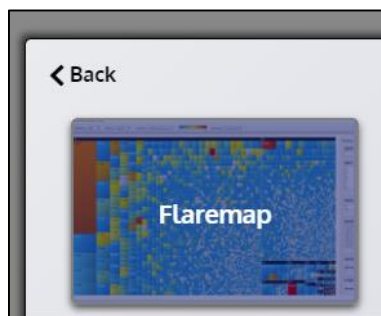
4.1 About Flaremaps

Flaremaps are holistic, data-dense visualizations that are designed to drive anomalies to the surface. Flaremaps use “cells” to represent data, with the cells grouped, sized, and colored based on selected data attributes. Flaremaps allow a dataset to be pivoted on many dimensions, leading to a multitude of perspectives and insights.



4.2 Deploying a Flaremap

Flaremaps, while a core component of the Platform, are nicely contained within the Workflow Drawer alongside Workflow Extensions. This makes them easy to access and deploy in the same way you would a Workflow Extension.



Before adding a Flaremap, be sure you have added a Data Source. If you have not yet added a Data Source, see section 3.6 Connecting to Data to learn how to do so.

NOTE: You should set the Data Source you want to use with the Flaremap as the primary Data Source before configuring the Flaremap. By default, the Flaremap will use this data. If you do not, you may see a blank Flaremap field until pointing the Flaremap to the appropriate data source.

To deploy a Flaremap, open the Workflow Drawer, choose the “Flaremap” suite, and click and drag a “Flaremap” out onto the Desktop.

A Flaremap element within the Platform shares many of the same dynamic features and controls as Workflow Extensions, including the ability to be moved and resized, as well as the ability to be locked and collapsed.

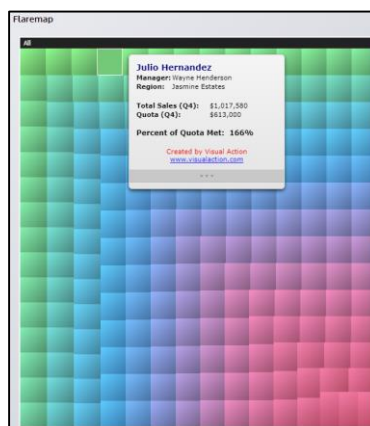
Move and size the Flaremap as you would with any Workflow Extension. Once ready, continue on to learn about the components of a Flaremap and how to configure them within the Platform.

4.3 Flaremap Components

There are three main components to the Flaremap interface: the Flaremap field, controls, and filters, as well as some additional utilities.

4.3.1 Flaremap Field

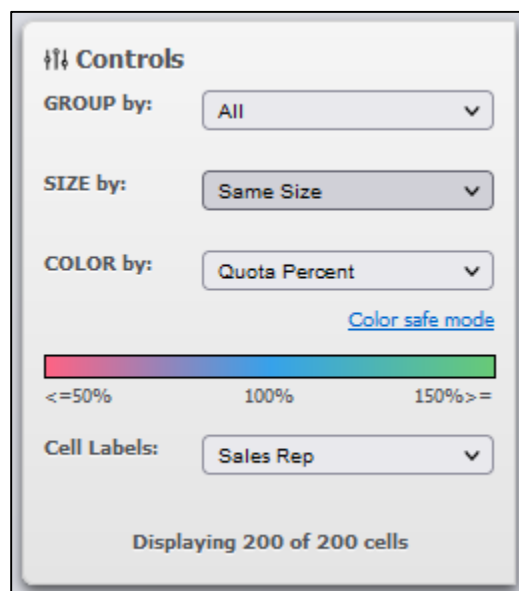
The Flaremap field covers most of a Flaremap’s interface, visualizing data using the methodology of a treemap.



Flaremaps use cells to represent data from the connected data source, with each cell representing a record (row) from the data. The Flaremap field is where all of these cells are displayed.

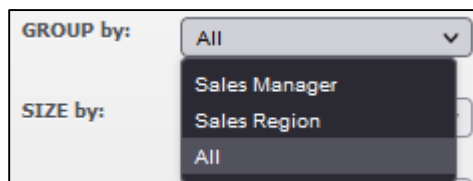
4.3.2 Controls

The Controls panel appears to the upper-right of the Flaremap field. This panel is where you can switch between options for grouping, sizing, and coloring cells to quickly drive the information you need to the surface. This panel also contains controls for toggling cell labels.

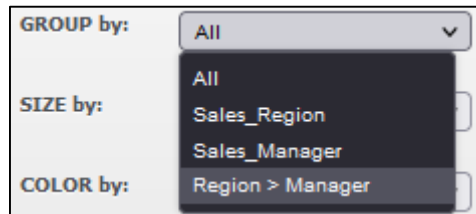


GROUP by

The "GROUP by" dropdown allows the user to select which option for grouping the cells is used. Groups are driven by (text) values that are shared across multiple rows of data.

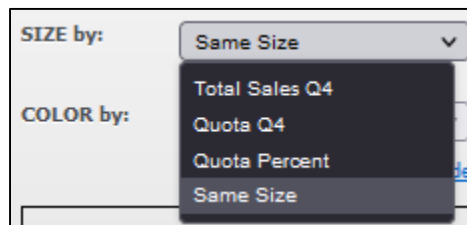


Grouping in Flaremap JS also includes hierarchies, or “groups within groups.” Groups may be created based on multiple data columns, and cells will be sub-grouped based on each selection.



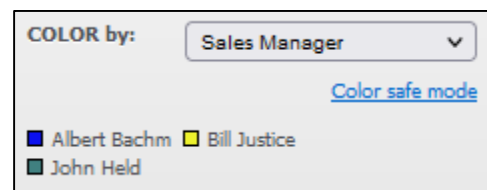
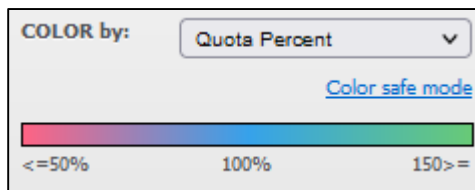
SIZE by

The “SIZE by” dropdown allows the user to select which option is used to size the cells. Sizes are driven by numerical values in the data.



COLOR by

The “COLOR by” dropdown allows the user to select which option is used to color the cells. Colors may be driven by both numerical data (spectrum) or text data (legend).

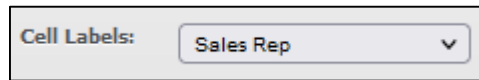


Each color by option is accompanied by either a spectrum or legend, respective to the data type of the column being used to color by, beneath the “COLOR by” dropdown. This is where the user can see what each color represents.

Beneath the “COLOR by” dropdown is a toggle labeled “Color safe mode.” Color safe mode is a feature that automatically alters colors to assist colorblind users in seeing the Flaremap properly. Click this button to toggle color safe mode. To exit this mode, click the button again, which will now say “Standard mode.”

Cell Labels

The “Cell Labels” dropdown allows the user to select what data, if any, is displayed directly on the cells themselves.



Cell Display Count

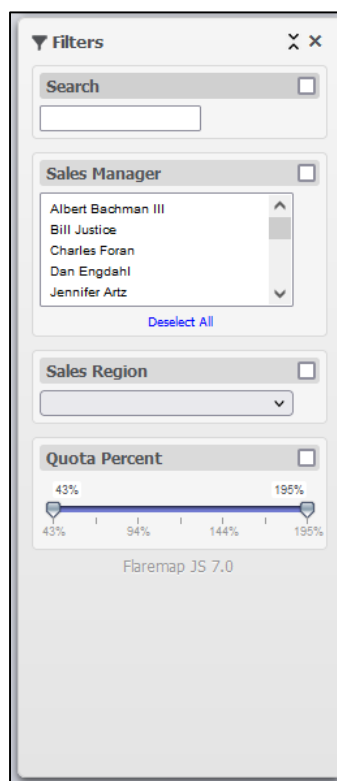
At the bottom of the Controls panel, there is a count of the cells displayed on the Flaremap. This automatically updates when filtering to indicate how many cells are visible out of the total number of cells in the data at any given time. It will initially show that all cells are visible.

Displaying 200 of 200 cells

Displaying 10 of 200 cells

4.3.3 Filters

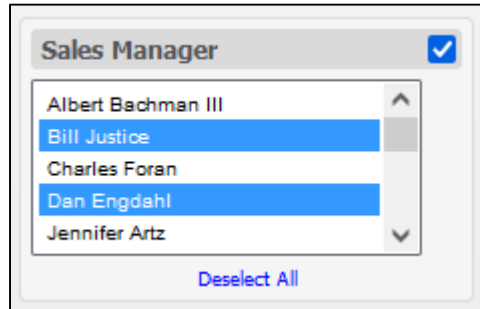
The Filters panel appears to the lower-right of the Flaremap field. Filters do just that – filter (hide or display) cells based on various rules or combinations of rules. Filtering is a powerful and fast way to narrow down data into an applicable subset.



There are three main types of filters (and one special type) within Flaremap JS:

Filters

Basic filters, known as just “filters” or “select filters,” display only the cells that match a certain value within the associated data column.

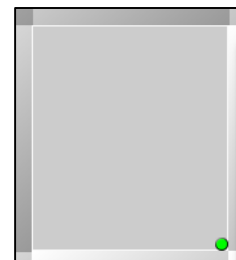
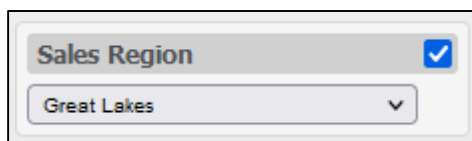


Filters can be individual, meaning only one value to filter by may be selected from a dropdown, or multiple, meaning that multiple values can be selected to filter to all cells which match *any* of the selections. These types can be distinguished on the interface by looking for a dropdown versus a list containing at least two visible items.

To select multiple items within a multiple-select filter, hold Ctrl while clicking each item. Use the “Deselect All” button at the bottom of the filter to deselect every option in that filter.

Indicators

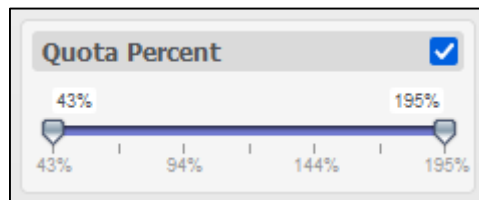
Indicators provide a way to “filter” items with a visual cue. Similar to basic filters, there are individual and multiple modes of indicators. The difference is that the cells matching the criteria of the selected items in an indicator will have a visible beacon placed on top of them. This is opposed to the previous type of filter, which actually *hides* the cells that don’t match any of the selected criteria.



Indicators come in various styles, which can be set in the Flaremap configuration. See the next section (4.4 Flaremap Configuration) to learn how to adjust these styles.

Sliders

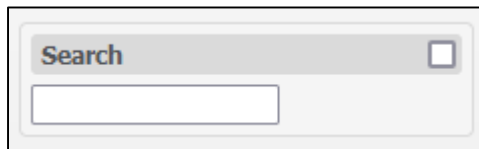
Sliders provide a way of accurately filtering numerical data. Unlike the other two filter types, sliders provide – you guessed it – a range slider that can be adjusted to a specific range.



When a slider's range is adjusted, the cells will be filtered to display only the cells whose data (for that slider's selected column) falls within the selected range.

Search

There is one special type of filter that is always present in the Filters panel, whether you create more filters or not. This filter is a "Search" filter.



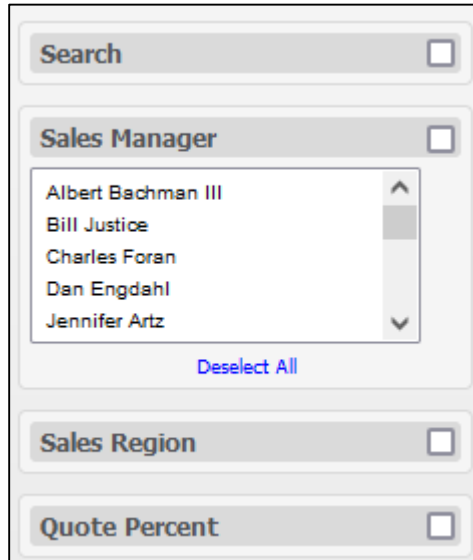
When you configure your Flaremap, the Search filter will automatically be configured to search any text columns in the data. This filter is always present and may not be removed. You cannot create additional Search filters, as the default one will cover all searchable columns.

Use the Search filter to quickly find a specific cell or set of cells with an identifiable piece of information by typing into the input box within the filter. The Flaremap will automatically filter cells as you type. Once the software can no longer find any cells with matching data, the Flaremap will indicate that "No results match your criteria."

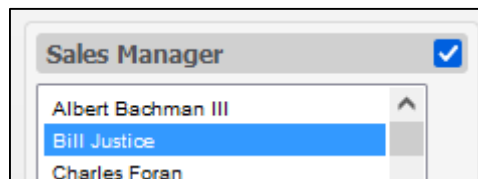
Filters are each represented within their own box inside the Filters panel. When you add a filter in the Flaremap configuration and apply changes, you will see them automatically

populate themselves in this panel (the default Flaremap will begin with an almost empty Filters panel).

Each individual filter may be collapsed by clicking on its header (title bar). Expand the filter again when needed by clicking again on the filter's header.



When you click inside a filter to use it, the filter will automatically be enabled. This can be seen by the checkbox in the upper-right corner of the filter automatically becoming checked.



You can disable a filter without deselecting your options or adjusting your parameters by unchecking this box. This saves users from having to reselect items or resetting a slider range when toggling between using a filter and not using it. It enables users to quickly switch between which filters are currently applied.

In the upper right of the Filters panel, you will notice two buttons: a "Collapse All" button (✕) and a "Deselect All" button (x).



Collapse/Expand All

The “Collapse All” button (✕) will collapse all filters within the Filters panel. This is helpful in Flaremaps with many filters, as it keeps filters in a smaller form, allowing the user to expand only the relevant filters at any given time.

Likewise, after collapsing all filters, this button will change to an “Expand All” (⬆) button. Clicking this button will do the opposite, opening up all filters within the Filters panel.

Deselect All

The “Deselect All” button (x) will uncheck (disable) all filters which are currently active. This allows users to quickly turn off all filters and restore the full dataset to the Flaremap field.

NOTE: This is different from the “Deselect All” seen at the bottom of multiple-select filters and indicators, which only deselects all selected options within that specific filter.

4.3.4 Sidebar

To the right of the Controls and Filters panels, there is a narrow bar containing three arrows in its center. This bar is used to collapse these two panels and keep them out of the way. This can help users focus on the Flaremap field if they are performing analysis and do not need to adjust any Controls or Filters.

Collapsing the Controls and Filters panels *will not* undo the selections made in these panels when they were open.

Simply click the Sidebar to collapse these panels. The arrows will reverse once close. Click it again to reopen these panels.



4.3.5 Header Controls

As mentioned previously, the Flaremap shares many controls and capabilities with Workflow Extensions. This includes the controls in its element’s header.

For Flaremaps, however, two new controls are introduced: “Upload Flaremap Configuration,” and “Export Filtered Data.”

Upload Flaremap Configuration

The  (upload) icon in the Flaremap element’s header provides an option for users to upload a Flaremap configuration file. This allows users coming from older versions of the software (Flaremap JS 6.9 and below) to upload and import their existing Flaremap configurations, such that they may continue with the same Flaremap they were already using without having to recreate it. Users will be able to immediately use the Flaremap as-is, or use the new and improved controls of the Platform to edit their existing configuration further.

Export Filtered Data

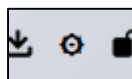
Most data management within the Platform is done via the Data Sources interface. Some users, however, may want to export the subset of filtered data they have arrived at using the Flaremap for other purposes.

Clicking the  (export) button will export only the filtered (visible) cells’ data to a CSV file.

4.4 Flaremap Configuration

In the Visual Action Platform, Flaremaps are now creatable right through the interface!

Begin the configuration of your Flaremap by clicking the  (gear) icon in the upper right corner of the header.



Please note that some sections within this section on configuration include quick-reference tables at the end for users to quickly address what specific controls do. Read through the text if you need to learn how to perform an action within the Platform, or use the tables if you just need to quickly recall the function of a specific control.

4.4.1 Naming a Flaremap

A Flaremap can be named in the same way an Extension would be. Once you have opened the Flaremap configuration in the Editor panel, the first option will allow you to enter a name for the Flaremap.

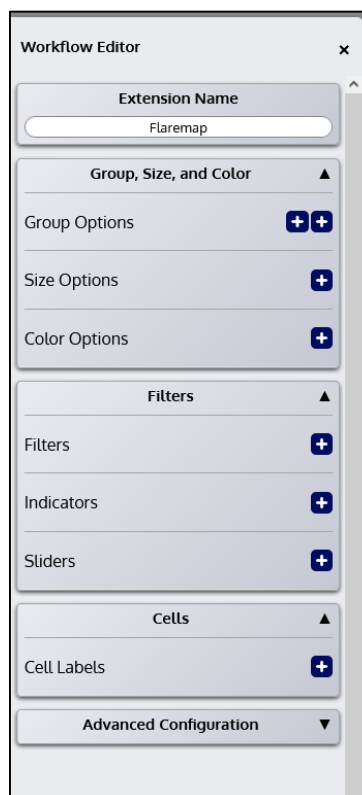


The image shows a configuration panel with a title bar labeled "Extension Name". Below the title bar is a text input field containing the word "Flaremap".

Enter any desired name, then click out of the input box. The name will automatically update.

4.4.2 Creator Groups

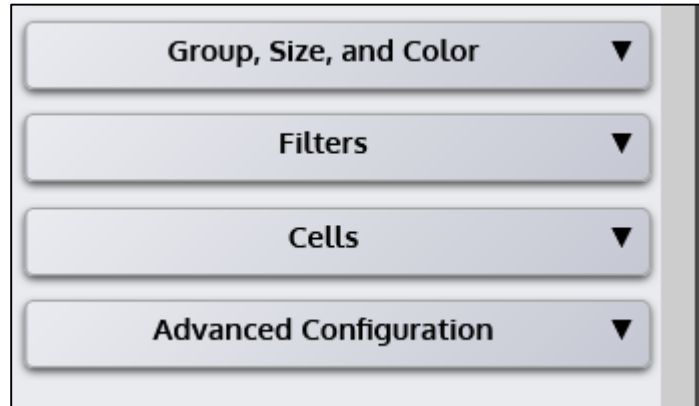
There are many options to be created and configured when it comes to Flaremaps. Because of this, these options are categorized into smaller groups within the Editor panel.



The image shows a "Workflow Editor" panel with a close button (x) in the top right corner. The panel is organized into several sections, each with a title and a list of options:

- Extension Name**: A text input field containing "Flaremap".
- Group, Size, and Color**: A section with a collapse arrow (▲) on the right. It contains three sub-sections:
 - Group Options**: A text input field with a plus icon (+) on the right.
 - Size Options**: A text input field with a plus icon (+) on the right.
 - Color Options**: A text input field with a plus icon (+) on the right.
- Filters**: A section with a collapse arrow (▲) on the right. It contains three sub-sections:
 - Filters**: A text input field with a plus icon (+) on the right.
 - Indicators**: A text input field with a plus icon (+) on the right.
 - Sliders**: A text input field with a plus icon (+) on the right.
- Cells**: A section with a collapse arrow (▲) on the right. It contains one sub-section:
 - Cell Labels**: A text input field with a plus icon (+) on the right.
- Advanced Configuration**: A section with a collapse arrow (▼) on the right.

Each settings group may be collapsed and expanded. As the Editor panel fills up, it may be helpful to collapse a group to limit the need to scroll. Click the upper banner of a settings group to collapse it. The arrow at the right of the banner will reverse. Click the banner again to expand the group.



Group, Size, and Color

Within this settings group, Flaremap group (and hierarchy), size, and color options may be created.

Filters

Within this settings group, each type of filter may be created.

Cells

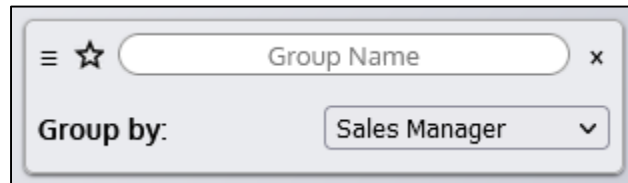
This settings group is where cell-specific configurations are made. Cell Labels may be set up here.

Advanced Configuration

This group begins collapsed by default. This group contains advanced settings for configuring the Flaremap. This section should only be used by those experienced with creating Flaremaps in previous versions of Flaremap JS, or by advanced users who have thoroughly familiarized themselves with the **Flaremap JS 7.0 User's Guide**.

4.4.3 Creator Cards

Each component you create within the Flaremap will appear in its own “card” within its settings group. These cards share some common characteristics.



Sort Handle

The ≡ (triple-bar) icon in the upper left of a card indicates that the card can be dragged to sort. You may drag cards around to sort them and place them in the order you wish them to appear in the Flaremap options.

Default Toggle

A ☆ (star) icon in the upper left of a card represents a toggle for making that option the default. There may only be one default for each type of option. For example, there is one default for groups, one for sizes, one for colors, etc. Selecting a default is *not* required. When you do select a default option, the star will fill (★).

Option Name

In the top center of every card is an input box for a corresponding option name. This is the visible name the option will be given when showing up in lists within the Flaremap interface.

All options require names. If an option name is left blank, it will automatically be given a name relative to the column of data selected for that option.

Delete Button

In the upper right of a card is an × button. Clicking this button will delete the option.

Quick-Reference Table

Option	Description	Display
Sort Handle	Allows an option to be sorted for a particular position in the option list.	≡
Default Toggle	Toggles the default option for an option type. Only one per option type may be selected.	 Not set as Default  Set as Default
Option Name	Specifies the name of an option, which appears within the Flaremap interface.	Group Name
Delete Button	Removes a created option.	×

4.4.4 Creating Group Options

The first option you will see to create for your Flaremap is a group option.

Across from “Group Options,” to the right, you will see two + buttons. By default, these buttons look like this: , but this can change depending on the theme/style selected for the application.

The left button creates a standard, single-level group option. The right button creates a hierarchy, or multi-level, group (within group) option.

Create group

Begin by clicking the left + button on the “Group Options” header. You will see a new group option card appear.

You can name the group option now, or wait until you select the column of data to group by to enter an appropriate name.

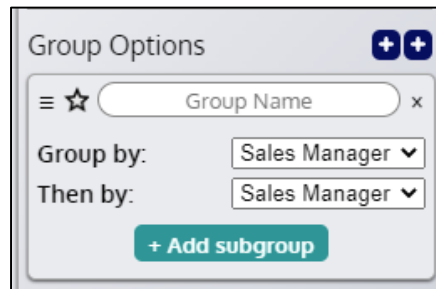
In the “Group by” dropdown, select the column of data you would like this option to group by. Recall that group options come from columns of data type **TEXT|ENUM**.

If you haven’t already, give the option an appropriate name.

Repeat this process for as many standard group options as you would like.

Create hierarchy

Begin by clicking the right + button on the "Group Options" header. You will see a new hierarchy option card appear, but this option will contain both "Group by" and "Then by."

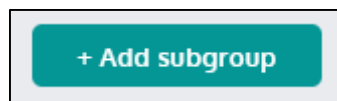
A screenshot of a 'Group Options' dialog box. At the top, it says 'Group Options' with two blue plus icons to its right. Below this is a search bar with a star icon on the left, a text input field containing 'Group Name', and a close 'x' icon on the right. Underneath the search bar are two dropdown menus: 'Group by:' and 'Then by:', both currently set to 'Sales Manager'. At the bottom of the dialog is a green button with a white plus icon and the text '+ Add subgroup'.

You can name the hierarchy option now, or wait until you select the columns of data to group by to enter an appropriate name.

In the "Group by" dropdown, select the column of data you would like this option to initially group by. This option will be the outermost group of the hierarchy. Recall that group options come from columns of data type **TEXT|ENUM**.

In the "Then by" dropdown, select the next column of data you would like this option to group by. This will be the first subgroup under the initial group you previously chose. Hierarchies must have at least one subgroup. To group by just one column of data, delete this option using the **x** in the upper right corner, then go to the previous section and create a regular group option.

To add more subgroups, click the "+ Add subgroup" button. This will add another "Then by" dropdown. Follow the procedure in the previous paragraph to create a further subgroup.



NOTE: A hierarchy requires there to be a standard group option for each column used within the hierarchy. If you haven't created a group option for one of the columns used in your hierarchy option, the Platform will automatically create one for you.

NOTE: Too many subgroups can quickly get messy within the Flaremap. You may want to test out how your hierarchy looks as you add layers by applying your changes one step at a time.

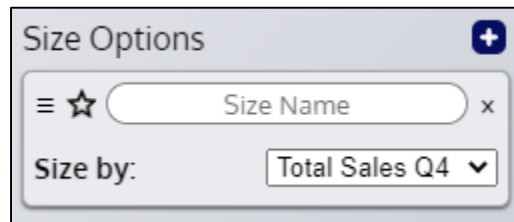
If you haven't already, give the option an appropriate name.

Repeat this process for as many hierarchy group options as you would like.

NOTE: An "All" group option, which contains all cells, is automatically created and is always available. The "All" group option cannot be modified or removed.

4.4.5 Creating Size Options

The next option you will see to create for your Flaremap is a size option.



Begin by clicking the + button to the right of the "Size Options" header. You will see a new size option card appear.

You can name the size option now, or wait until you select the column of data to size by to enter an appropriate name.

In the "Size by" dropdown, select the column of data you would like this option to size by. Recall that size options come from columns of data type **NUMBER**.

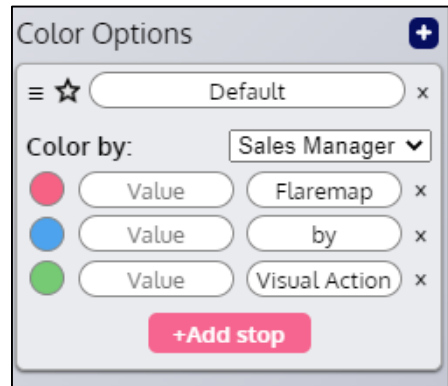
If you haven't already, give the option an appropriate name.

Repeat this process for as many size options as you would like.

NOTE: A "Same Size" size option, which makes all cells the same size, is automatically created and is always available. The "Same Size" size option cannot be modified or removed.

4.4.6 Creating Color Options

The third option (the final option in the “Group, Size, and Color” creator group) you will see to create for your Flaremap is a color option.



Begin by clicking the + button to the right of the “Color Options” header. You will see a new color option card appear.

You can name the color option now, or wait until you select the column of data to color by to enter an appropriate name.

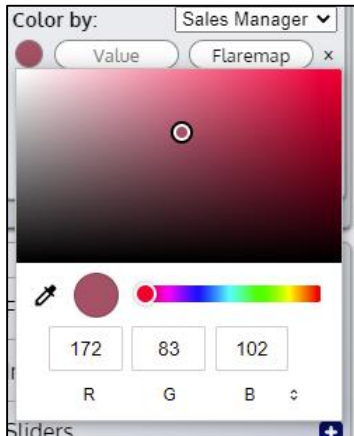
In the “Color by” dropdown, select the column of data you would like this option to color by. Recall that color options can be used on both **TEXT** (including **TEXT|ENUM**) as well as **NUMBER** data types; however, the legend type (and therefore configuration) will be slightly different depending on the data type.

Color Spectrums for NUMBER Data Type

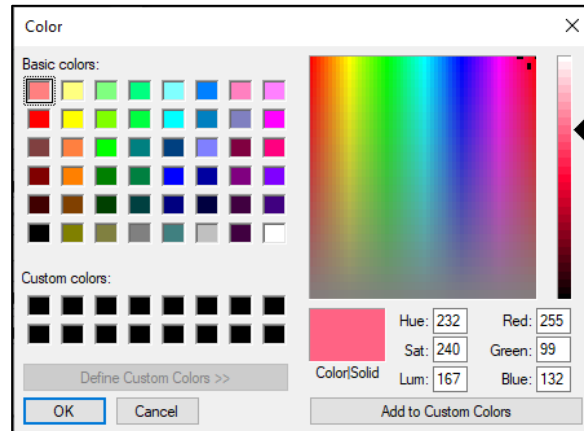
If you have chosen a numerical data column for your color by, you will enter numerical values as stops for colors, and this will create a **spectrum**.

Click “+ Add stop” to add a color stop. You will see a color stop creator line appear.

Click the color bubble to the left (default color is black), then select the desired color for this stop.



Google Chrome



Mozilla Firefox

NOTE: Color-pickers are a feature of the browser, and thus the interface where you choose your colors may not look like the above examples.

Once you have chosen a color, click inside the input box that says “Value” (immediately to the right of the color bubble). Enter the **numerical** value that should correspond to this color on the spectrum.

NOTE: Flaremap JS will automatically create a gradient spectrum from the colors you enter. Enter the main colors you want used; there is no need to add dozens of colors to achieve a spectrum with a gradient.

Finally, click in the second input box (to the right), labeled “Legend Label.” Enter the text which you want displayed on the color spectrum while this color option is being used.

NOTE: Try to keep labels short, as once you create many color stops, long names may start to overlap each other.

Repeat this process for each color stop you want to add to the spectrum.

Color Legends for TEXT or TEXT|ENUM Data Type

If you have chosen a text data column for your color by, you will enter text values as stops for colors, and this will create a **legend**.

Click "+ Add stop" to add a color stop. You will see a color stop creator line appear.

Click the color bubble to the left (default color is black), then select the desired color for this stop.

Once you have chosen a color, click inside the input box that says "Value" (immediately to the right of the color bubble). Enter the **text** value that should correspond to this color on the spectrum.

Finally, click in the second input box (to the right), labeled "Legend Label." Enter the text which you want displayed alongside this color in the legend while this color option is being used.

Repeat this process for each color stop you want to add to the legend.

Once you have added all the colors you need to your option, give the option an appropriate name, if you haven't already.

Repeat this process for as many color options as you would like.

NOTE: A "Default" color option is created when a Flaremap is first deployed. You may modify this option to make it one of your own color options, or simply delete it.

4.4.7 Creating (Standard) Filters

In the next creator group, "Filters," the first option you will see to create for your Flaremap is "Filters." These are the standard select filters.



The screenshot shows a window titled "Filters" with a close button (x) in the top right corner. Inside the window, there is a section labeled "Filters" with a plus icon (+) to its right. Below this, there is a "Filter Name" input field with a menu icon (≡) to its left and a close icon (x) to its right. Underneath, the "Filter by:" dropdown menu is set to "Sales Manager". The "Select type:" section has two radio buttons: "Single" (unselected) and "Multiple" (selected). At the bottom, the "List length:" input field contains the text "List length".

Begin by clicking the + button to the right of the “Filters” header. You will see a new filter card appear.

You can name the filter now, or wait until you select the column of data to filter by to enter an appropriate name.

In the “Filter by” dropdown, select the column of data you would like this option to filter by. Recall that filter data options come from columns of data type **TEXT|ENUM**.

Why Only TEXT|ENUM for Filters?

Data columns that are TEXT|ENUM have repeated values, whereas TEXT columns have mostly unique values. This is why TEXT|ENUM is used for group options.

Using TEXT columns for filters would likely result in the list of options for the filter being close to, if not exactly, as long as the list of rows in the data. In most cases, it’s illogical to use a filter in this way to locate a single, or perhaps a couple, cell(s).

Navigating to a single cell is much better done using the Search filter, as if the user already knows exactly which filter option they would click on to find that single cell, that user could begin typing in the box. This is usually faster than scrolling through a large list of options as well.

In the “Select type” buttons, choose “Single” or “Multiple.” “Single” will create a dropdown that only lets one enumerated value (think of these as groups) from the chosen column be filtered by at a time. “Multiple” will enable multiple enumerated values to be filtered by at once.

If you chose “Multiple,” enter a value of at least 2 into the “List length” input box. This indicates how many options from the list you can see at any given time within the filter, without scrolling.

If you haven’t already, give the filter an appropriate name.

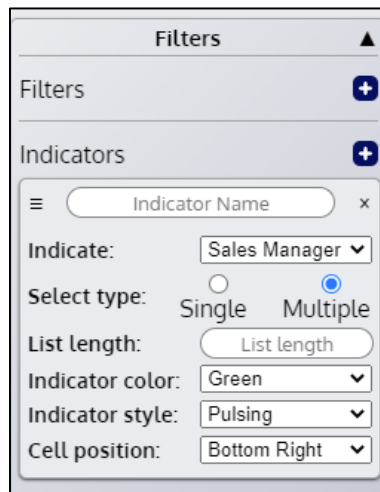
Repeat this process for as many filters as you would like.

Quick-Reference Table

Option	Description	Accepted Values	Default Value
Filter by	The column of data associated with this filter.	Any column name presented in the dropdown list.	First option in the list
Select type	Determines whether one or multiple items from the list may be used to filter by at a time.	Single or multiple (radio buttons).	Multiple
List length	When a type of "Multiple" is used, indicates how many options are visible in the filter's list without scrolling. When type is "Single," option is hidden.	Any positive integer.	5

4.4.8 Creating Indicators

The next option you will see to create for your Flaremap is "Indicators."



The screenshot shows a configuration panel titled 'Indicators' with a '+' button to its right. Below the title is a search bar labeled 'Indicator Name' with a close button 'x'. The panel contains several settings:

- Indicate:** A dropdown menu currently showing 'Sales Manager'.
- Select type:** Two radio buttons, 'Single' and 'Multiple'. The 'Multiple' button is selected.
- List length:** A text input field containing 'List length'.
- Indicator color:** A dropdown menu currently showing 'Green'.
- Indicator style:** A dropdown menu currently showing 'Pulsing'.
- Cell position:** A dropdown menu currently showing 'Bottom Right'.

Begin by clicking the + button to the right of the "Indicators" header. You will see a new indicator card appear.

You can name the indicator now, or wait until you select the column of data to "indicate" (filter) by to enter an appropriate name.

In the "Indicate" dropdown, select the column of data you would like this option to trigger on (indicate). Recall that indicator data options come from columns of data type **TEXT|ENUM**, for the same reasons as described above for filters.

NOTE: If you are looking for a way to track an individual cell or a few cells as they move around the Flaremap, you can use the "Track this cell" option in the mouseover menu after clicking on the cell you want to track.

In the "Select type" buttons, choose "Single" or "Multiple." "Single" will create a dropdown that only lets one enumerated value (think of these as groups) from the chosen column be indicated at a time. "Multiple" will enable multiple enumerated values to be indicated at once.

If you chose "Multiple," enter a value of at least 2 into the "List length" input box. This indicates how many options from the list you can see at any given time within the indicator, without scrolling.

In the "Indicator color" dropdown, choose the color you would like this indicator to display.

Choose a style from the "Indicator style" dropdown. "Static" will remain a solid color, "blinking" will alternate with a white flash and the chosen color, and "pulsing" will smoothly fade to white, then back to the chosen color.

Choose a position for the indicator to appear on the cell in the "Cell position" dropdown.

If you haven't already, give the indicator an appropriate name.

Repeat this process for as many indicators as you would like.

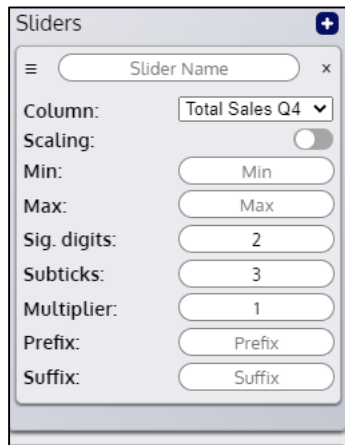
Quick-Reference Table

Option	Description	Accepted Values	Default Value
Indicate	The column of data associated with this indicator.	Any column name presented in the dropdown list.	First option in the list
Select type	Determines whether one or multiple items from the list may be used to filter by at a time.	Single or multiple (radio buttons).	Multiple
List length	When a type of "Multiple" is used, indicates how many options are visible in the indicator's list without scrolling. When type is "Single," option is hidden.	Any positive integer.	5
Indicator color	The color of the indicator on the cell.	Any color presented in the dropdown list.	Green
Indicator style	The visual style of the indicator.	Any style presented in the dropdown list: • Solid: Solid color • Blinking: Blinking between chosen color and white • Pulsing: Smooth fade between chosen color and white	Pulsing
Cell position	The position on a cell where the indicator appears.	Any position presented in the dropdown list: • Top Left • Top Right • Bottom Right • Bottom Left • Top Center	Bottom Right

4.4.9 Creating Sliders

The third option (the final option in the “Filters” creator group) you will see to create for your Flaremap is “Slider.”

Begin by clicking the + button to the right of the “Sliders” header. You will see a new slider card appear.



The screenshot shows a configuration panel titled "Sliders" with a close button (x) in the top right corner. Below the title is a text input field labeled "Slider Name". The panel contains several settings:

- Column:** A dropdown menu currently showing "Total Sales Q4".
- Scaling:** A toggle switch that is currently turned off.
- Min:** An input field with the text "Min".
- Max:** An input field with the text "Max".
- Sig. digits:** An input field with the value "2".
- Subticks:** An input field with the value "3".
- Multiplier:** An input field with the value "1".
- Prefix:** An input field with the text "Prefix".
- Suffix:** An input field with the text "Suffix".

You can name the slider now, or wait until you select the column of data to filter by to enter an appropriate name.

In the “Column” dropdown, select the column of data you would like this option to filter by. Recall that slider data options come from columns of data type **NUMBER**.

Toggle “Scaling” if you want to scale the slider range. By default, slider ranges are linear. Enabling scaling will draw the first 25% of values over approximately the first 50% of the slider range.

If you want a custom minimum value for the slider range, enter that value in the “Min” input box. Leave this box blank if you want the minimum value from the data to be used.

If you want a custom maximum value for the slider range, enter that value in the “Max” input box. Leave this box blank if you want the maximum value from the data to be used.

In the “Sig. digits” input box, enter the number of decimal places (significant digits) you want to display in the slider labels. A value of 0 will round numbers to whole numbers.

Significant digits only display if there are non-whole numbers in the data column selected.

“Subticks” indicates the number of minor ticks to be drawn on the slider range. Enter a custom number if you would like more ticks (and labels) to be drawn on the range.

If desired, enter a multiplier in the “Multiplier” input box. A multiplier will multiply all values by the entered number. This may be useful, for example, when creating a slider for very large numbers, especially in conjunction with prefixes and suffixes.

In the “Prefix” and “Suffix” inputs, enter any text you would like to appear before and after, respectively, each label on the slider. For example, when dealing with monetary values in the thousands, you may want to enter a prefix of “\$” and a suffix of “K” (with a multiplier of 0.001). This (with the multiplier) would turn a value of 100,000 from the data into “\$100K” on the slider range.

If you haven’t already, give the slider an appropriate name.

Repeat this process for as many sliders as you would like.

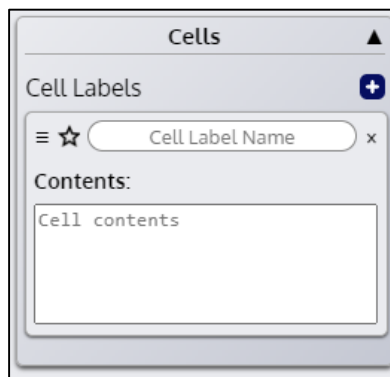
Quick-Reference Table

Option	Description	Accepted Values	Default Value
Column	The column of data associated with this slider.	Any column name presented in the dropdown list.	First option in the list
Scaling	Enables scaling of the slider range. When disabled, a linear scale is drawn. When enabled, the first 25% of values will be drawn across approximately the first 50% of the slider range.	Enabled or disabled (toggle).	Disabled
Min	The minimum value for the slider range. When blank, the minimum value from the selected data column is used.	Any number greater than the minimum within the data.	N/A

Max	The maximum value for the slider range. When blank, the maximum value from the selected data column is used.	Any number less than the maximum within the data.	N/A
Sig. digits	The number of significant digits (decimal places) to use after non-whole numbers.	Any non-negative integer.	2
Subticks	The number of subticks (and therefore labels) to include on the slider range.	Any positive integer.	3
Multiplier	A value to multiply slider values by.	Any number.	1
Prefix	Text to place before the value in a slider label.	Any text.	N/A
Suffix	Text to place after the value in a slider label.	Any text.	N/A

4.4.10 Creating Cell Labels

In the next creator group, “Cells,” the first option you will see to create for your Flaremap is “Cell Labels.” These are the labels that go directly on top of cells.



Begin by clicking the + button to the right of the “Cell Labels” header. You will see a new cell label card appear.

Enter a name for the cell label option.

In the “Contents” input area, enter the desired configuration for your cell labels.

Currently, the contents of cell labels are entered as they are in the technical configuration file of a Flaremap. A basic description of how to enter this configuration is given below. See the **Flaremap JS 7.0 User's Guide** for more detailed information on cell label configuration.

To include a column's data in a cell label, the **column name** (header, key, etc.) must be included in the "Contents" input. This is different from the alias (friendly name) you created while setting up the Data Source being used.

Wrap a column name in curly braces (`{ }`) in the cell label contents to use it in the label.

Example: `{sales_rep}`

You may enter text of your own in cell labels as well. For example, if you want to include an ID number (with a column name of "client_id" in the cell label, and also indicate that this is an ID, you could write:

Example: Client ID #: `{client_id}`

To make a line break and continue your label onto a new line, simply hit `Return` (or `Enter`) and continue writing on the next line.

See the **Flaremap JS 7.0 User's Guide** for more detailed information on cell label configuration.

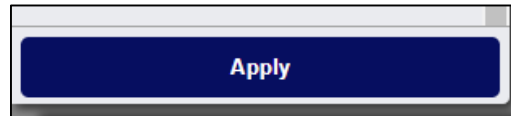
Repeat this process for as many cell label options as you would like.

4.4.11 **Mouseover Boxes**

Cell and group mouseover boxes do not currently have updated Editor controls. See section 4.5.2 Manual Configurations to learn about manual configurations. Familiarity with previous versions of Flaremap JS (Flaremap JS 6.9 and below) and the **Flaremap JS 7.0 User's Guide** will be required. For assistance in designing custom mouseover boxes, contact us (see section [Contact](#)).

4.4.12 Saving Settings

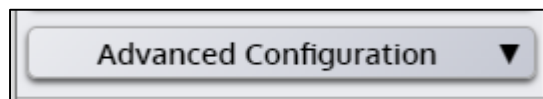
Once you have configured your Flaremap, click the “Apply” button at the bottom of the Editor to immediately apply your changes to the Flaremap. You will receive a notification that the settings were successfully applied, and you will see the Flaremap update immediately.



You can apply changes frequently throughout your creation of a Flaremap to test options out. There is no need to fully configure every portion of the Flaremap before applying changes.

4.5 Advanced Flaremap Configuration

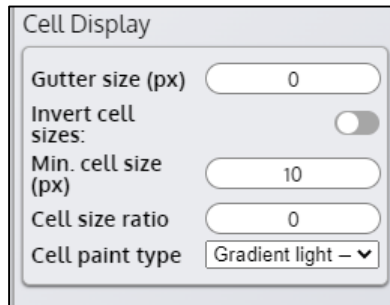
The final creator group available in the Flaremap configuration options is “Advanced Configuration.” This contains advanced controls for experienced Flaremap users and technical personnel.



Only modify controls in this section if you are well-experienced with creating Flaremaps in older versions of the software (Flaremap JS 6.9 and below) and/or are thoroughly familiar with the contents of the **Flaremap JS 7.0 User’s Guide**.

4.5.1 Cell Display

This control group contains options for the drawing and display of cells within the Flaremap. They may be modified to improve accessibility of the Flaremap as well as to achieve custom Flaremap designs.



Gutter size (px)

The gutter size defines the width of the lines between cells in the Flaremap field. By default, there is no space between cells. Increase this number to increase the line width between cells. Width is measured in pixels (px).

Invert cell sizes

Inverting the size of cells uses different logic than the typical Flaremap algorithm's logic. Cells that would normally be the smallest (lowest value) become the largest cells, and the largest become the smallest, respectively. This feature is useful when the most important values are actually the smallest values rather than the largest.

Min. cell size (px)

This value enforces a minimum size for cells, in pixels (px). No cell may be drawn smaller than the minimum cell size. This is useful when there may be many small cells that become very tiny relative to the largest cells, and often therefore become hard to pinpoint with the mouse cursor.

Cell size ratio

This value is an approximate ratio between the smallest and largest cells in the Flaremap field. A value of 0 enforces no ratio. A value of 1 makes all cells the same size. Values between 2 and 50 will scale cells between relatively similar in size (2) and significantly dissimilar in size (50).

Cell paint type

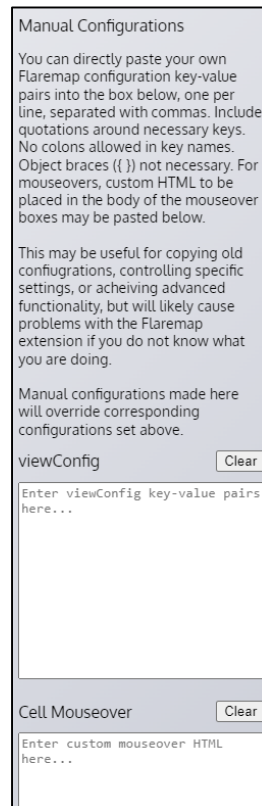
The paint type of a cell indicates the graphic style used to paint a cell's color. There are three options. "Solid" paints the cell with a solid color. "Gradient light → dark" (default) gradients the cell color with a lighter color in the upper-left corner and a darker color in the lower-right corner. "Gradient dark → light" inverts this logic, with the darkest color in the upper-left corner and the lightest color in the lower-right corner.

Quick-Reference Table

Option	Description	Accepted Values	Default Value
Gutter size (px)	Size, in pixels, of the space between cells.	Any non-negative integer.	0
Invert cell sizes	Inverts cells sizes, such that the lowest value is represented by the largest cell, rather than the largest value being represented by the largest cell.	Enabled or disabled (toggle).	Disabled
Min. cell size (px)	The minimum size, in pixels, that a cell may be.	Any non-negative integer.	10
Cell size ratio	Defines a ratio for approximate similarity in size between the largest and smallest cells.	• 0: No ratio • 1: All cells are the same size • 2-50: Scales cells between relatively similar in size (2) and significantly dissimilar in size (50)	0
Cell paint type	Indicates the graphic paint type of cells.	• Solid: Solid color for entire cell. • Gradient light → dark: Gradient from light to dark from upper-left to lower-right. • Gradient dark → light: Gradient from dark to light from upper-left to lower-right.	Gradient light → dark

4.5.2 Manual Configurations

The Manual Configurations section allows technical and experienced users to manually enter Flaremap configuration parameters. This may be especially useful for those building new Flaremaps, but who are very familiar with older versions of the software (Flaremap JS 6.9 and below).



The screenshot shows a panel titled "Manual Configurations" with the following text:

You can directly paste your own Flaremap configuration key-value pairs into the box below, one per line, separated with commas. Include quotations around necessary keys. No colons allowed in key names. Object braces ({ }) not necessary. For mouseovers, custom HTML to be placed in the body of the mouseover boxes may be pasted below.

This may be useful for copying old configurations, controlling specific settings, or achieving advanced functionality, but will likely cause problems with the Flaremap extension if you do not know what you are doing.

Manual configurations made here will override corresponding configurations set above.

viewConfig

Enter viewConfig key-value pairs here...

Cell Mouseover

Enter custom mouseover HTML here...

Advanced users may enter parameters for the viewConfig (legacy configuration file JSON object) and for the cell and group mouseovers (HTML). Establishing these parameters is described in the **Flaremap JS 7.0 User's Guide**.

Manual configurations will be applied when the "Apply" button is used, along with other Flaremap settings modified in the Editor panel. Manual configurations will override settings made in the above controls in the Editor. If not being used, leave these input areas blank, or click the "Clear" button near each one to ensure they are empty, such that improper parameters don't override other settings and cause the Flaremap to malfunction.

Manual Configurations are currently the only way to create custom mouseover boxes. Contact us at www.visualaction.com/contact for assistance.

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6 Contact

For questions, comments, or any other assistance, get in touch with us using any of the following:



Visual Action Software, Inc.

+1 972 808 0400

info@visualaction.com

www.visualaction.com/contact