Enhancing the Stock User Interface

When the out-of-the-box Rollbase Interface just doesn't cut it.

Creating screens for the Customer Object present some interesting challenges. On one hand, we want to store both the Billing and the Physical addresses for our customers. One thing we wanted to achieve was to eliminate the redundancy of the words "Physical" and "Billing", yet we want both sets of addresses to occupy the same section. (Granted, we could have easily created two sections, giving each one the appropriate title, but this ends up taking up too much valuable real estate.)

So how do we overcome this? The default Edit screen that Rollbase looks like this:

As you can see in this sample, the address information looks redundant, and you cannot tell which address blocks are which.

Our solution to this is to create a new section entitled "Addresses" and move those blocks of fields into that section. Furthermore, we want to use available features to help identify which section is which.

We are going to go ahead and edit this page.   Edit this Page

The first thing I don't like is the look of the "Customer Information" section. It has the correct title, but I'm not a fan of the "Title Bar" presentation. If you click on that section, you will see the following in the upper left hand corner:

As you can see, the "Style" for this section is "Title Bar". I'd like to change that to "Title and Rounded Border". This style does a better job framing the section and separating it from other sections.

The next thing to do is drag a new section onto the screen, below the Customer Information. Title this section "Addresses" and give it the same style as above. Go ahead and give it two columns as well. We will be putting the physical address on the left side and the billing address on the right. After making these changes, your edit screen should look something like this image to the right. Unfortunately, we still have not solved the differentiation between the physical and the billing addresses.

To overcome this limitation, we can add some other available tools to make improvements. A very simple way to do this is just to add some text above each block. To do this, drag a [New HTML Component] onto the section above both groups of fields. On the one above the physical address information (left side), you could simply type in the text "Physical Address", center it, change the color and size and click "Save".
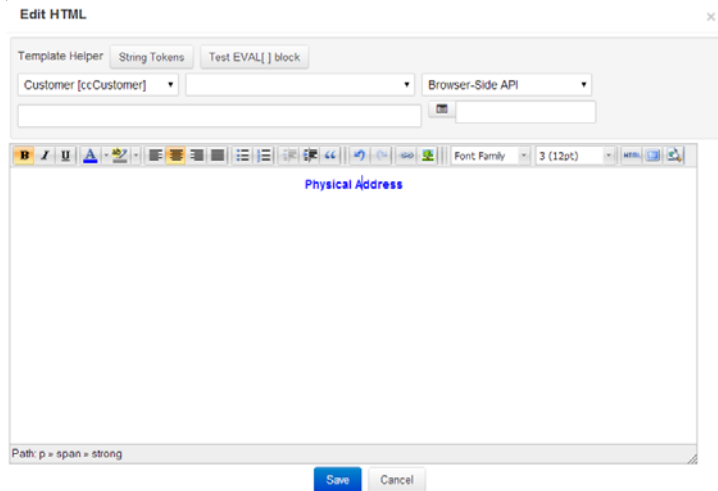
Repeat the process for the Billing Address and you end up with the following:
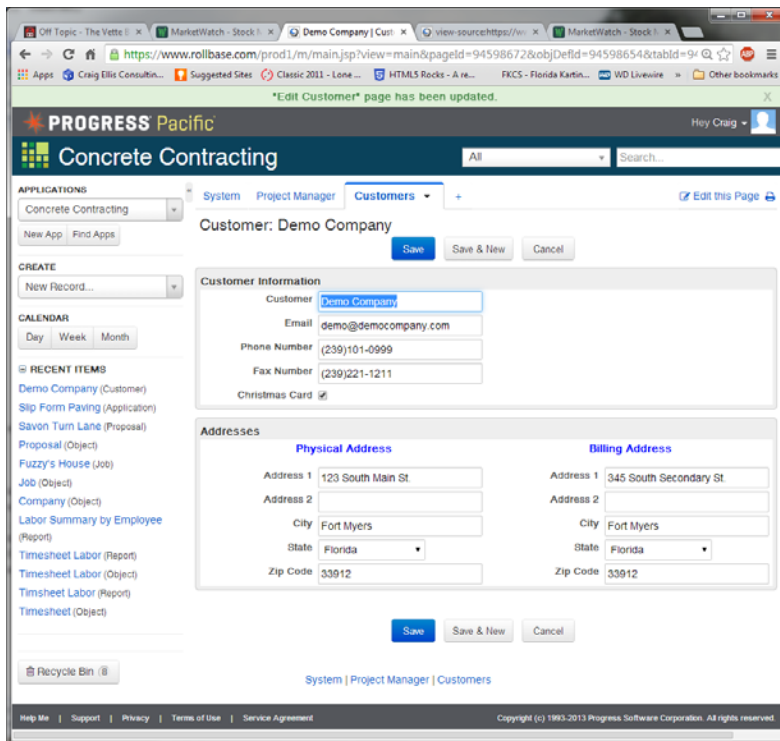

If this meets with your expectations, you could simply stop there. But, if you're looking for more, while you were in that rich text editor, you may have noticed an "HTML" button. This section allows you to create fully formed HTML documents (I believe it only supports through HTML 4.1 at the present), but

you can still do some pretty wonderful things. Granted, this formatting will reside solely within the container in which you place it. While there are ways get even more creative using HTML, we're going to simply use a graphics program to create some more "visual" labels to replace the static text. In doing so, we're going to introduce a whole new area in Rollbase; hosted files.

Hosted Files

Hosted files offer lots of different benefits, whether it's storing images to be used on portals, or in our case, HTML components on a form, or for document templates, or whatever else you can dream up, Rollbase gives you the chance to upload them and have them available when you need them. This is especially useful if you are using the public cloud, meaning you don't have access to storing files on the server or creating custom JSP pages. (more on that later).

Using Corel Draw, we created labels with shadows for Billing and Shipping Addresses.   **Physical Address**
You can use just about any program to create graphics, but once you are happy with your labels, you can upload them to the hosted file section. To do this, you need to return to the Setup section and click on "Hosted Files" under the Application Setup section.
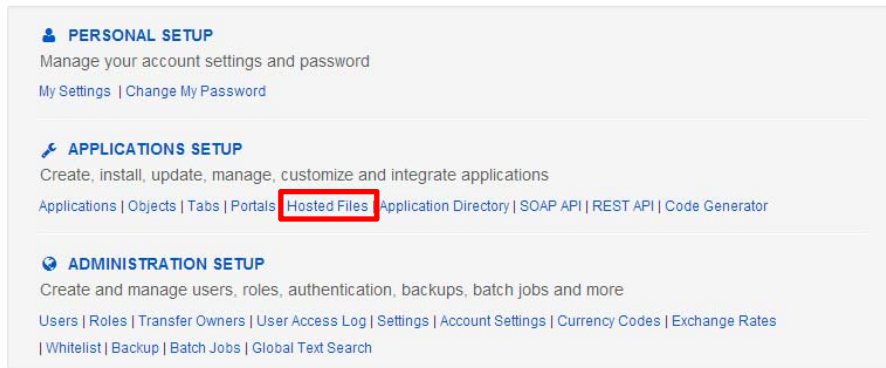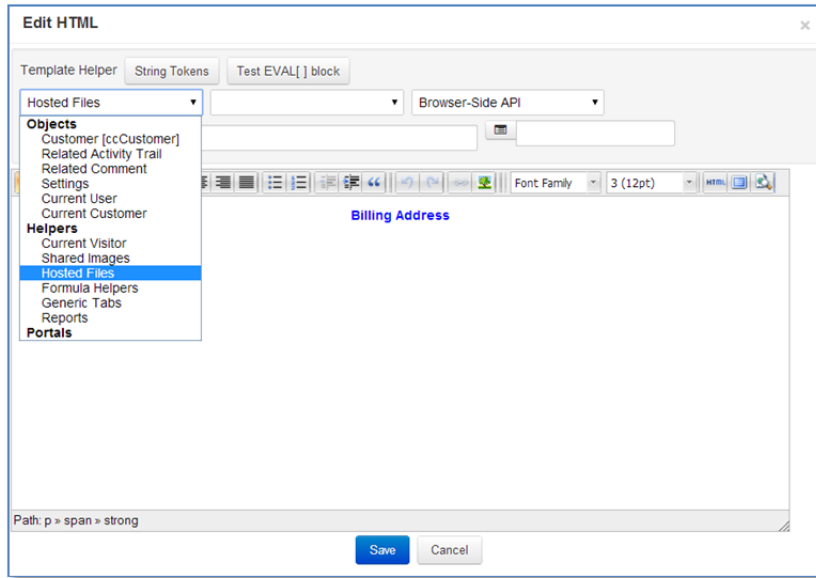

From there, click on **New Hosted File** the button. Enter a description for this file, in our case "Physical Address", choose and upload the file, and add a longer description for it if desired. Underneath the long description, you can check all applications that should be able to access the file. Click the **Save** button. You will return to a list of all of your hosted files.

In order to use these new files, you will need to return to the customer edit screen where we added the two HTML objects to the address section.

When you edit one of the HTML components, you'll see your original colored labels. We are going to replace that label with some html code to reference the hosted file. As shown to the left, if you click the template helper drop down, you will see Hosted Files. Click this option. In the middle drop down, you'll then pick the hosted file image that you want. Doing so will return the string tokens necessary to copy into the HTML section, and it even highlights it completely for you to simply copy into memory for pasting into the HTML section.

Copy the code from here and then click the HTML button on the toolbar.

Replace what you find in the HTML Source Editor with what you just copied. As this is HTML, I made some further modifications for appearance. I want the images centered over each section and I added a blank paragraph element at the top to allow the images to float down just a touch. Without that, the images snug up against the top of the section and look cramped.

Once you click the "Update" button, you'll return to the preview. It will show an image placeholder, but not the image. This is normal. Click the "Save" button again and you return back to the form edit screen, where once again you will only see an image placeholder.

After you successfully place both of your images, you can

finally save the edited form. It is at this time that you will now see the fruits of your labor. Granted these images aren't the most earthshattering, they do illustrate some of the more hidden powers of Rollbase.

Repeat the process for the New and View screens and you'll be complete for the basic customer screens.