Switching to the New User Interface

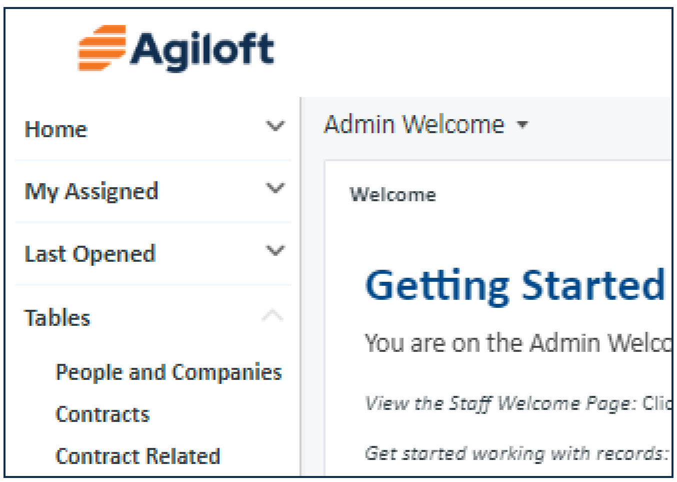
With release 25.1, the legacy UI is deprecated. If you haven't upgraded to that version yet, use this page to prepare your system and users by transitioning to the new UI gradually, before you upgrade. If you've already upgraded to 25.1, you are using the new UI and don't need to take further action here.

The new UI includes a navigation bar at the top of the screen, updates to Quick Search, and other improvements to the table view, like drag and drop columns.

How can I tell if I'm affected?

You're affected if:

- You still see the **left pane**.

  Example left pane, where Home, My Assigned, Last Opened, and several tables are listed in a column on the left side of the screen

- You can't **drag and drop** columns in the table view.

If you don't see a left pane, and you can drag and drop columns in the table view, you probably aren't affected. In this case, you are already using the new UI, and no further action is needed.

What do I need to do?

Before you start editing navigation menus, make a rollout plan. You can manage the rollout of the UI changes by switching the navigation menus of specific teams. The navigation menu position also controls whether the other UI changes are visible.

We recommend rolling out the nav bar to a few teams at a time *before* you upgrade, rather than updating all the navigation menus simultaneously. That way, you can inform the relevant teams when the change is coming, and solicit and incorporate any feedback so that each team has a helpful, intuitive menu design. This also allows some teams to get used to the other UI changes, and even help members of other teams that receive the update later.

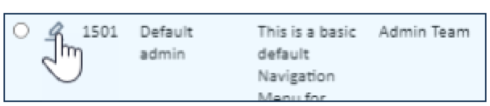
- Navigation menus are assigned to users according to their teams. Click the **Setup** gear in the top-right corner and go to **Look and Feel > Navigation Menu Setup**. Browse the list to see how many navigation menu configurations are active in your system, and how many teams are assigned to each one. The "Default for Teams" column shows which teams use each menu.
- Identify some configurations that are only active for a few teams. These configurations will be the first wave of the rollout.
- Within those teams, identify users who are comfortable with the system, who will be able to help others on their team. If time permits, bring those users in during the design stage to help you create a navigation menu that will work best for their needs.
- Continue identifying additional rounds of teams. Save the biggest teams, teams with infrequent users, and teams with users who aren't comfortable with the system until the very end. If possible, invite stakeholders for those teams to start testing the navigation menu early, so they have time to test and change their design.

When you have a plan, begin reviewing and editing navigation menus, and then switching each one to the new top nav bar location according to your plan. We recommend starting with the menu you have assigned to yourself and other administrators.

How do I edit a navigation menu?

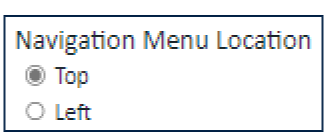
First, open a navigation menu you want to work with. It's easiest to start with a navigation menu used only by the admin team, or by copying a navigation menu so you can experiment without affecting other users.

1. Click the **Setup** gear in the top-right corner and go to **Look and Feel > Navigation Menu Setup**.
2. Edit a navigation menu. For ease of testing, start by editing the navigation menu assigned to yourself, or by copying a navigation menu and assigning it to yourself so you can apply changes freely. Usually, admins are assigned to the very first navigation menu listed, which is on the bottom of the last page.



Editing the Default admin navigation menu

3. At the bottom of the General tab, set Navigation Menu Location to Top.

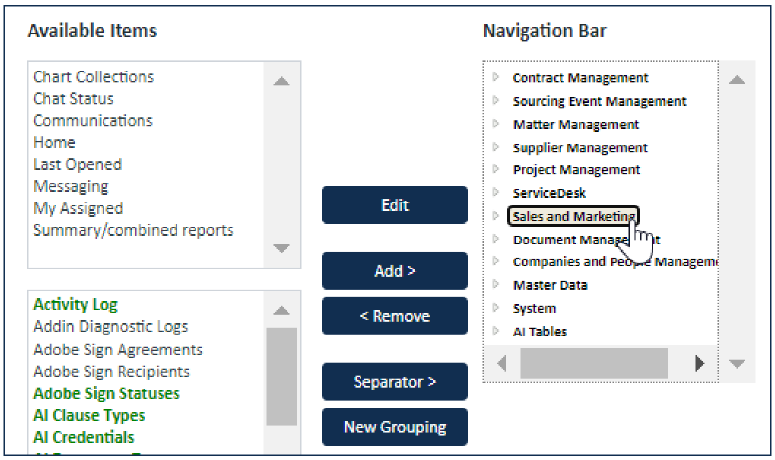


4. Go to the Apply tab and select Apply changes to me now.

5. Click Finish.

This refreshes the screen and shows you the nav bar, which is simply your left pane menu, reorganized. You might notice that you can't see all the groupings without opening the overflow menu, or that the tables you placed close together no longer make sense for your workflow. Take note of the things you want to adjust, and then make the changes:

1. Repeat steps 1-2 above to edit the navigation menu you're testing.
2. Go to the Content tab and adjust the tables and groupings, and their order, according to your liking.



Content tab options to add, remove, and change the design

3. Go to the Apply tab and apply the changes to yourself now.
4. Repeat this until you're happy with the navigation menu.
5. When you're finished, return to the Apply tab. In most cases, you don't need to change which teams are assigned, but you do need to push your changes out to the users.

What about users with personalized left panes?

When you update a navigation menu to the top nav bar, the "Push to users" setting on the Apply tab determines whether the change is applied users with personalized navigation menus.

- To unilaterally apply the updated configuration to all the users in the selected team, choose "Force changes upon users." This brings all affected users back into alignment with the team's default navigation menu. However, it also overrides any customizations users might have made to their navigation menus.
- To prompt users to update their menus, without removing existing customizations, you can choose "Notify users about optional change." However, if you do this, you need to communicate the plan to users so they know to go update their menu to the top nav bar. To do so, they will need to go to User Menu > Preferences > Navigation Menu Setup and click the option to update their navigation menu position. This updates their navigation menu to the same position as their team's menu, without affecting their customized modules. Users will also see a red notification badge that directs them to the Preferences menu.

- Do **not** select "Do not push changes to users." This allows users to stay on the left pane indefinitely, until the left pane is disabled by an upgrade. It's better to push the changes manually so you know when to send communications out.

What should I tell users?

Make sure to tell users what the plan is for their team, including the specific timing of the change. Remember that the teams in Agiloft might not match your organizational structure precisely, so make sure to cross-check who is affected. If you did follow our recommendation to identify ambassadors who can help their colleagues, consider mentioning those names in your communication as well, so users know who they can go to for help.

For all users, we recommend sharing the New User Interface Overview video, which gives brief instruction on the changes. You might also consider providing information about the specific menus you designed, if they are sufficiently different, or if you only use a few menus across your organization.

FAQs

Can't I just let the system convert the left pane to the nav bar, and be done?

The automatic conversion is intended to save you time, but left pane designs are necessarily different, due to the spacing and design of each. We recommend starting with the conversion, but doing some common-sense review and adjustment before applying it to user teams.

Specifically, the system automatically converts the left pane using these methods:

- Any items that aren't inside a top-level grouping are shown together in a new default module titled General, which usually includes items like Chart Collections, My Assigned, and Messaging. This is the first module that opens when you log in.
- Top-level groupings are used as modules. For example, if the first grouping in your navigation menu is People and Companies, the first module in the nav bar list is People and Companies, which contains all the same tables and items that showed when you expanded the People and Companies grouping in the left pane.
- Lower level groupings are shown as items on the nav bar. For example, if you have a System grouping with an Import grouping underneath it, the System module shows an item called Import that can be expanded to show its contents.

I followed all the steps, but I still can't drag and drop columns.

If you changed your navigation menu and applied it to yourself, but you still can't drag and drop columns in the table view:

1. Go to **Setup > Look and Feel > Power User Interface**.
2. Edit the scheme you're currently using. Check the "Applied To" column and find the scheme that lists your team.
3. At the bottom of the Global tab, set "Use New GUI" to Yes.

If you don't see this setting, go back to the navigation menu and check your work. Make sure to select the options to apply the changes to your team, and to yourself, and to apply them right now.

Now it's hard to read the names of the tabs on my nav bar.

The nav bar uses different color settings than the left pane, so you might need to tweak your Look and Feel schemes as well.

1. Go to **Setup > Look and Feel > Power User Interface**.
2. Edit the scheme you're currently using.
3. Go to the Toolbar tab.
4. Check the selected color in the Top Navigation Menu, Top Navigation Icon, and Top Navigation Item settings. You need the background color in the Top Navigation Menu setting to be sufficiently different from the colors of the Top Navigation Icon and Top Navigation Item. Otherwise, it will be hard to see the icon and item name against the toolbar background color.