Neo

ANNOTATED USER ROADMAP

New and Changed Feature Spotlight

Contents

OVERVIEW OF MAIN USER SCREENS

There are three main screens in Merlin Neo where the user will spend a majority of their time. This page provides a brief introduction to each screen, with more in-depth analysis to follow.

As with existing Merlin products, there will be administration and login pages, but the focus of this document is Neo proper and its features.

This document will also detail functionality for toolbars and menus after each screen has been discussed. Focus will be on new or changed functionality with Neo.

1. **Landing -** **New**
    This is the landing screen after a successful user login. The purpose of the screen is to provide the user with a more focused view of assets and content that are most important to them. Users may choose to see their most-used collections, assets needing their approval, recently uploaded or modified assets, etc. What they see will be controlled in the Merlin Admin. If a site, user or particular user group does not configure, this screen will show the default gallery view of most recently added assets.
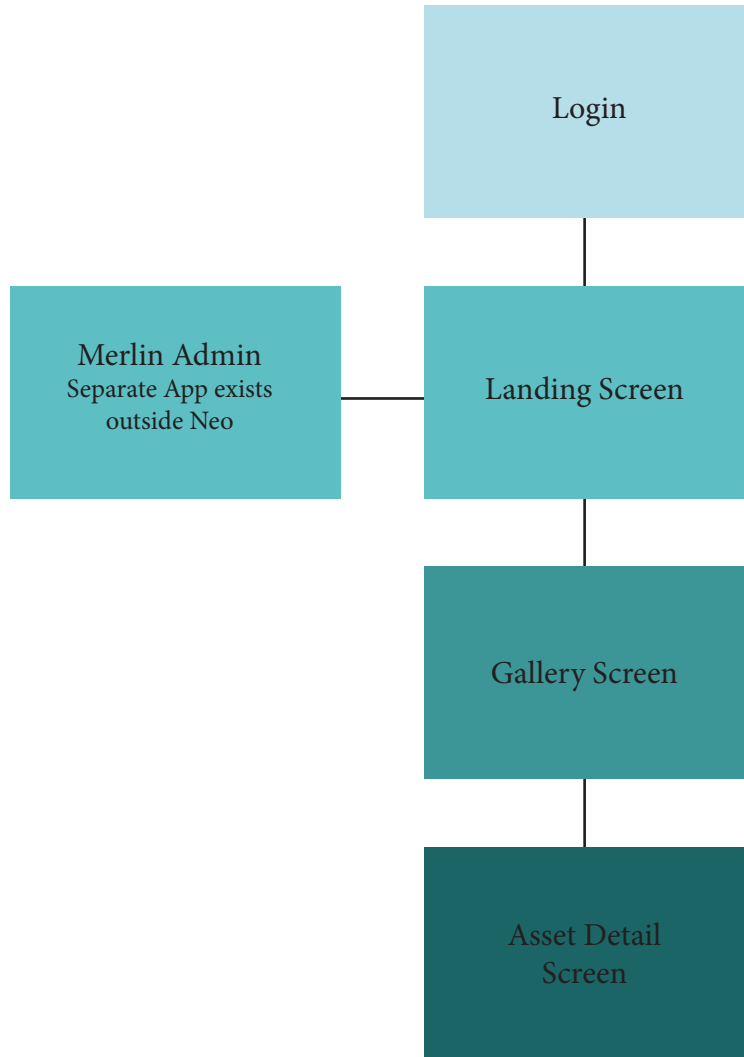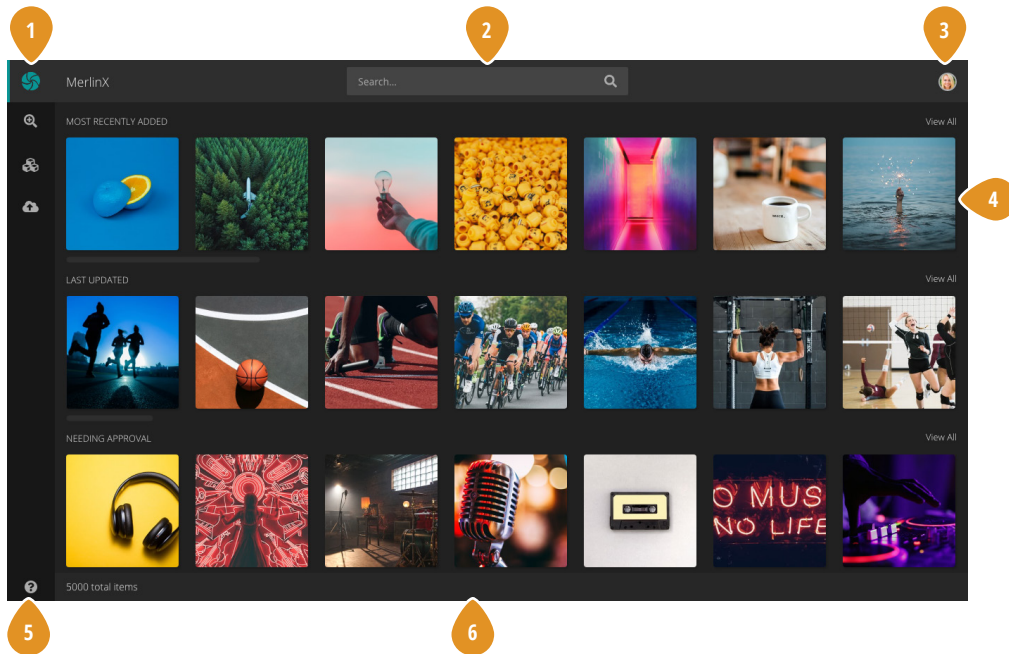
2. **Gallery**
    This is Neo's take on the standard gallery view which aims to combine MX Basic's ease of use and presentation of information with the more in-depth functionality from MX ported over. It will be familiar to most users, but with more functionality and a cleaner, more constant visual appearance.

3. **Asset Detail**
    The asset detail view, or one-up view, has been drastically updated to provide a clearer and more concise overview of the asset to the user. Asset metadata has been broken up into easier to parse chunks of related information and asset versions are now easily identified and browsed. Editing of related data, versions and all currently existing Merlin functionality remains, but with a design that is geared to ease of information processing and ease of editing.

NEO SCREEN MAP

Login

Merlin Admin
Separate App exists
outside Neo

Landing Screen
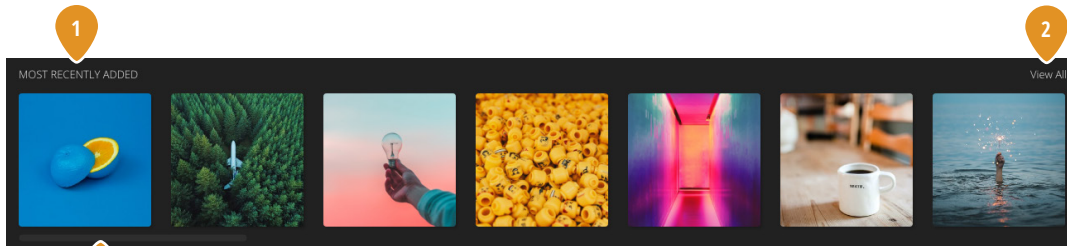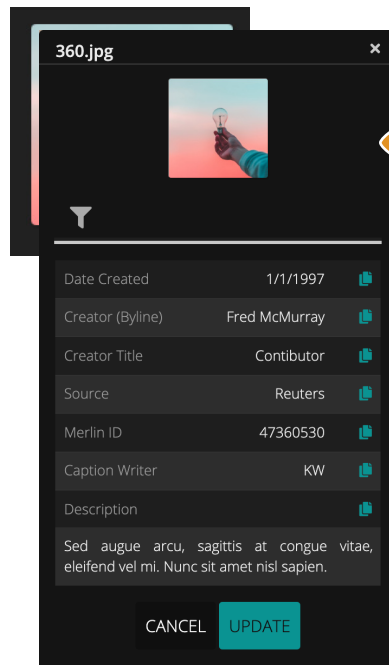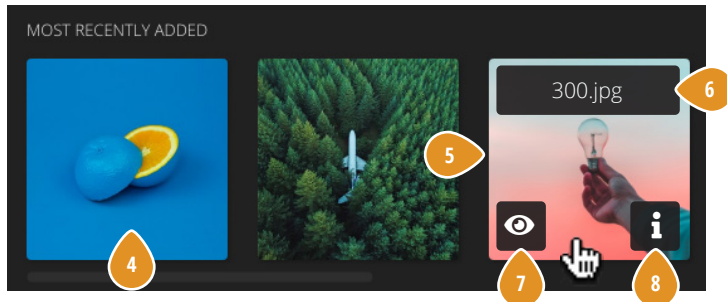
Gallery Screen

Asset Detail
Screen

LANDING SCREEN OVERVIEW

1. **Home Logo**
   On click, the user will always be directed back to their customized landing screen. If there is no customized landing screen, user will be directed to default gallery view.

2. **Quick Search**
   Standard search input allowing the user to quickly input a search query. Search will be submitted upon click of the magnifying glass button, or on return if the field is focus.

3. **User Settings Icon**
   Click of this icon triggers the user settings dropdown menu. From this menu the user will be able to select a Neo color theme, access the Merlin Admin, edit their profile settings, logout and switch to Merlin X (for as long as needed until phased out).

4. **Featured Content Row**
   This content of page is broken up into user-selected featured content rows of assets. Double-click of any asset in the row will direct the user to the asset detail page for the selected asset. The page will scroll as necessary to accommodate any number of rows. Featured content rows will be managed from the Merlin Admin where users may select from options such as most recent, needing my approval, last updated, selection collections, and saved searches (final list is still to be determined). If a featured content row returns 0 results, there will be appropriate messaging to inform the user.

5. **Left Toolbar**
   Neo's left tool column houses all the standard Merlin tools for navigation back to home, accessing the advanced search menu, collection, asset upload and help. The toolbar is scalable, and more options may be added as needed later.

6. **Status Bar**
   The standard Merlin bottom bar that on this page will show text for the total number of assets shown on the screen.

   *OPTION: Have no status bar on the landing screen?*

LANDING SCREEN - FEATURED ROW DETAILS

1. **Featured Row Title**
   Auto-generated text based on Admin selection for featured row.

2. **Featured Row View All Link**
   On click, the user will be directed to a standard gallery screen showing all the assets.

3. **Featured Row Scrollbar**
   Featured rows will scroll horizontally if necessary to accommodate a greater number of assets than the page width.

4. **Featured Row Asset**
   Standard Merlin thumbnail asset - square 160x160 fixed for ease of deployment. On double-click, user will be directed to asset detail screen of selected asset

5. **Asset Hover State (click for touch devices)**
   On hover, just as in Merlin Basic, additional content will be provided to the user giving more information about the asset.

6. **Hover State Title**
   Standard text of asset title. Will truncate if too long

7. **Hover State Asset View Button**
   Click/tap of this button directs the user to the asset detail view of the asset

8. **Hover State Asset Info Button**
   Click/tap reveals the quick-look asset detail card that will animate from the top left of the selected thumbnail.

9. **Quick-look Asset Detail Card**
   Identical to the Merlin Basic card, but with new opening animation and restyled, easier to read presentation.

GALLERY SCREEN - Search
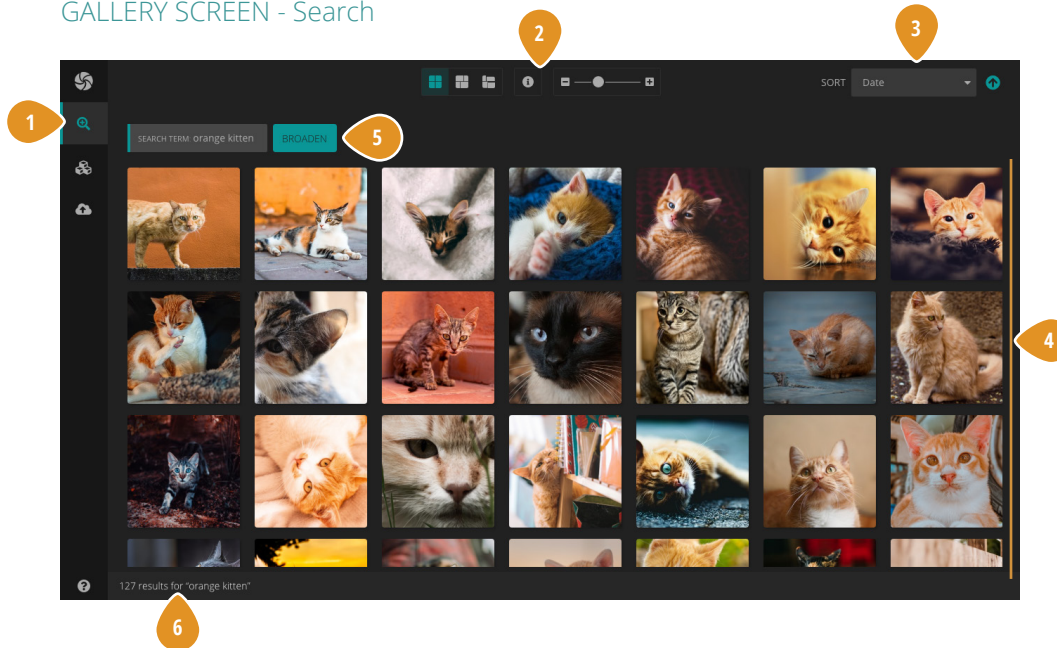
GALLERY SCREEN OVERVIEW - SEARCH

Gallery screens are accessed in one of two ways, the first being via a search or recalling a saved search. The second is via selection of a collection. Both are discussed in the document to illustrate the differences.

1. **Left Toolbar - Search Icon**
   If the gallery screen is invoked via a search, advanced search or recall of a saved search, the search icon button is highlighted to indicate to the user that there is an "active" search in place. This help the user keep tabs of what they are seeing on the screen. Click of this icon will trigger the launch of the advanced search options palette, where the user can apply facets to refine their search. The palette may be toggled on/off by click, and keeps track of all active search parameters and filters until the search is cleared by the user or a new search is performed.

2. **Gallery View Tools**
   These tools function the same as they do currently in MX Basic, they just have an updated look and top of page persistent placement where the grid below will scroll behind the toolbar.

3. **Gallery Sort**
   The user will select a gallery sorting option from the dropdown to select a sorting parameter, and then, if applicable to the selection, will use the arrow icon next to it to indicate the sort order (new/old, a-z/z-a, etc.). Sort order categories include: Date Input, Date Created, Date Published, Relevance, Stars, Creator, Title, Comment Count. The options in the menu are configurable by user in the Admin.

4. **Gallery Assets**
   Standard Merlin gallery display of assets, mirroring MX Basic. More details to follow. Double-click of an asset will direct the user to the asset detail screen for the selected asset. Hover interaction mirrors that discussed on the Featured Row Details page.

5. **Broaden Narrow Search and Search Breadcrumbs**
   This breadcrumb bar will always display the search term on the left as the anchor element until a new search is performed or the search is cleared. As new search parameters are added via advanced search the breadcrumbs will update with each new facet/filter applied. The broaden narrow button allows the user to toggle between "AND" searches and "OR" searches to narrow or broaden accordingly. The button will not appear on single word searches. This area will scroll with the grid. More details will follow on subsequent pages.

6. **Gallery Status Bar**
   Will display the number of results for the current search and the search string.

GALLERY SCREEN - Collection
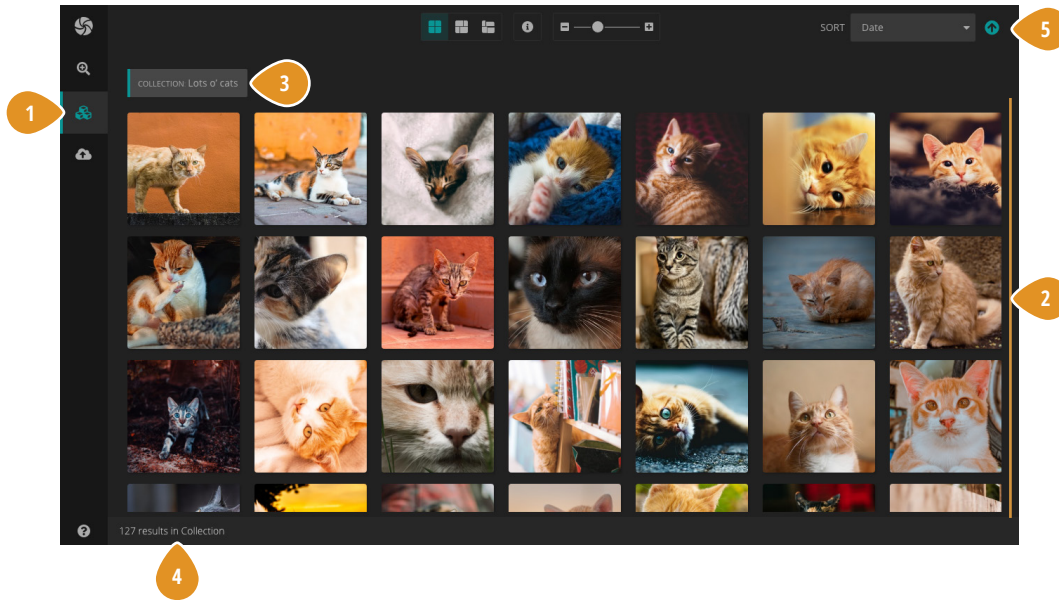
GALLERY SCREEN OVERVIEW - COLLECTION

There is little difference between a gallery screen view via search and via a collection. This page will only discuss the differences.

1. **Left Toolbar - Collections Icon**
   If the gallery screen is invoked via a collection, the collection icon button is high-lighted to indicate to the user that they are actively viewing a collection. This help the user keep tabs of what they are seeing on the screen. Click of this icon will trigger the launch of the collections palette where the user can select another collection, save the collection or create a new collection.

2. **Collection Assets**
   Standard Merlin gallery display of collection/search assets, mirroring MX Basic. More details to follow. Double-click of an asset will direct the user to the asset detail screen for the selected asset. Hover interaction mirrors that discussed on the Featured Row Details page.

3. **Collection Breadcrumb**
   This breadcrumb bar will display the name of the collection being currently viewed to help the user keep tabs on what is actively on the screen. It will scroll with grid.

4. **Gallery Status Bar**
   Will display the number of results for the current collection.
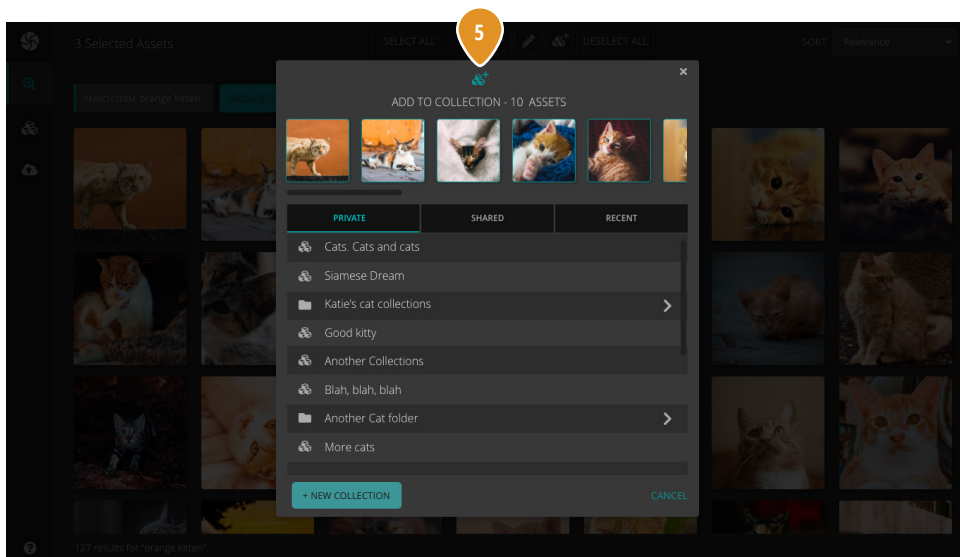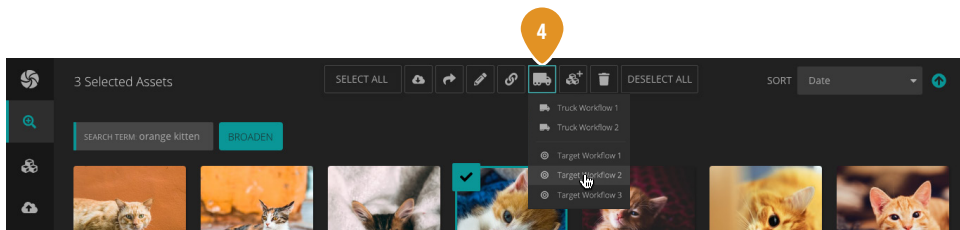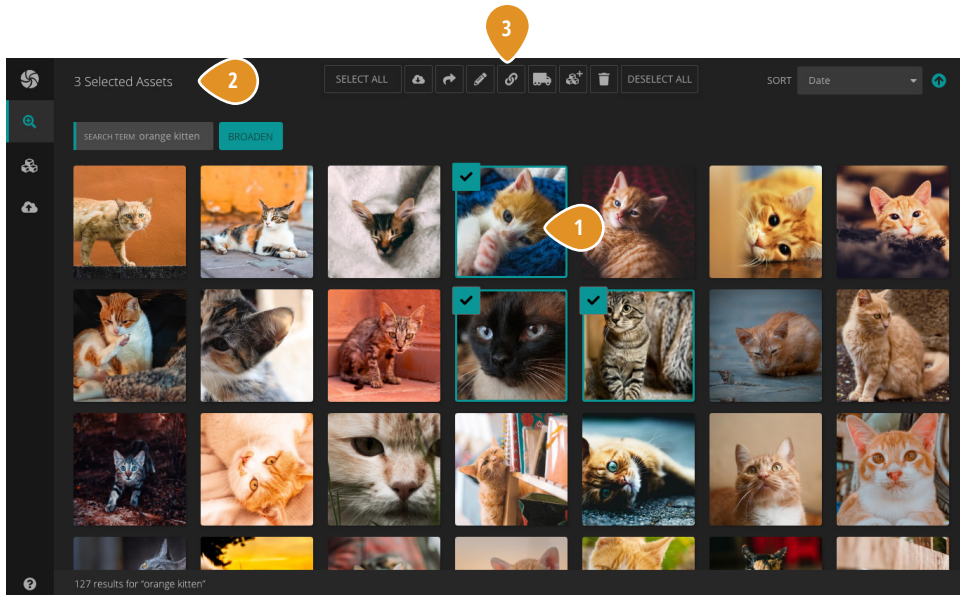
5. **Collection Sort**
   Sorting will work the same as on a search collection, however, it will only sort the collection assets.
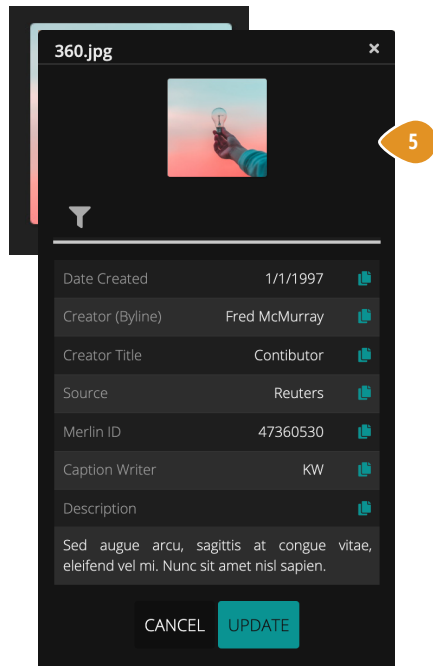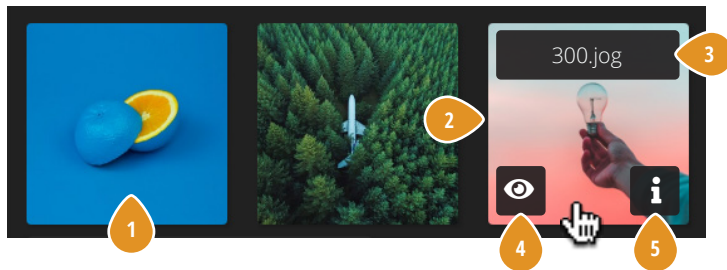
GALLERY SCREEN - ASSET INTERACTIONS

This will mirror the asset interactions discussed on the FEATURED ROW DETAILS PAGE of this document.

1. **Asset**
   Standard Merlin thumbnail asset. On double-click, user will be directed to asset detail screen of selected asset

2. **Asset Hover State (click for touch devices)**
   On hover, just as in Merlin Basic, additional content will be provided to the user giving more information about the asset.

3. **Hover State Title**
   Standard text of asset title. Will truncate if too long.

4. **Hover State Asset View Button**
   Click/tap of this button directs the user to the asset detail view of the asset

5. **Hover State Asset Info Button**
   Click/tap reveals the quick-look asset detail card that will animate from the top left of the selected thumbnail.

6. **Quick-look Asset Detail Card**
   Identical to the Merlin Basic card, but with new opening animation and restyled, easier to read presentation.

300.jog

360.jpg

Date Created	1/1/1997
Creator (Byline)	Fred McMurray
Creator Title	Contibutor
Source	Reuters
Merlin ID	47360530
Caption Writer	KW
Description	

Sed augue arcu, sagittis at congue vitae, eleifend vel mi. Nunc sit amet nisl sapien.

CANCEL   UPDATE

GALLERY SCREEN - ASSET SELECTION

Asset selection in Neo mirrors asset selection in MX Basic with small differences discussed below.

1. **Selected Asset**
   Click/tap of any asset in the grid selects the asset. A second click of the asset deselects it. Selected assets are identified by the colored stroke and check box in the upper left corner of the asset. The selection triggers the appearance/update of the selected asset counter. Additionally, the selected asset toolbar will fade in, replacing the, standard view gallery tools.

2. **Selected Asset Counter**
   Informative text that lets the user know how many assets are selected. It updates in real time upon asset select/deselect, and is hidden whenever selected count is zero.
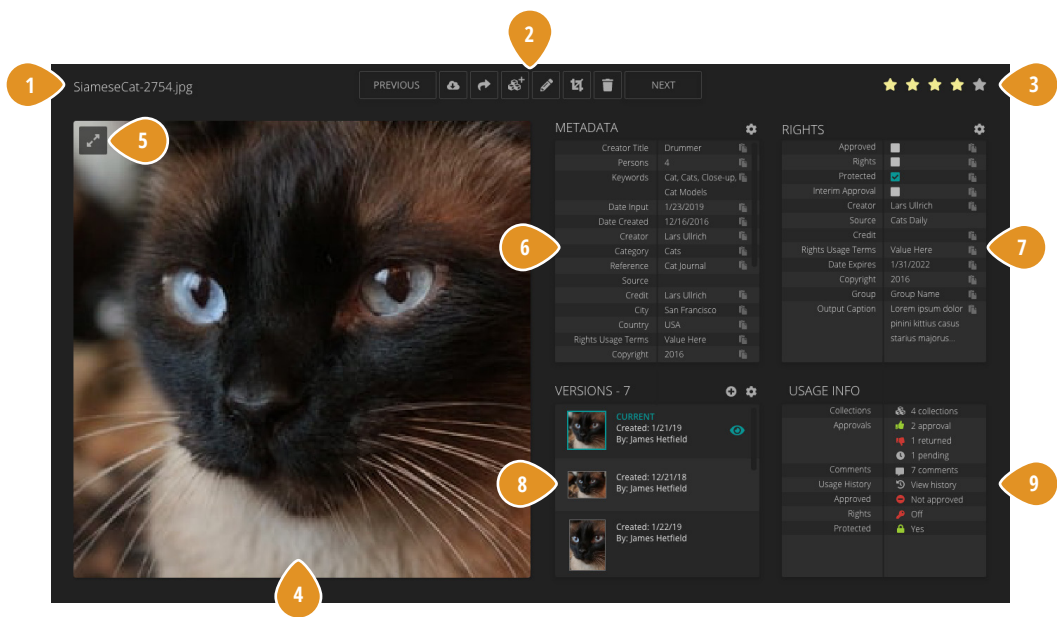
3. **Selected Asset Tools**
   Identical functionality to the MX Basic selected asset tools. Visual differences include text buttons for Select All and Deselect All assets to make this functionality more clear to the user. Also, buttons with dropdown options will include text as well as icons. This toolbar is expandable, and more buttons, or dropdown button options may be added without compromising the user experience. *NOTE: This example shows ported MX functionality for Linking, which in not yet in Basic.*

4. **Selected Asset Tool with Dropdown**
   If a selected asset tool has a dropdown menu, it will trigger on hover/single tap.

5. **Selected Asset Tool Modal Menu**
   As in MX Basic, once selected, an asset tool will launch a modal dialog menu with options for the user. The example to the left depicts adding selected assets to a collection. Only the presentation is different here. All dialog modals will have similar UI.

ASSET DETAIL OVERVIEW

1. **Asset Title - File Name**
   Simple title text. Editable from Metadata panel.

2. **Asset Toolbar**
   Identical tools as Selected Asset Toolbar (minus crop), however, only applicable to the selected asset on the page. Previous and Next buttons will show the previous/next asset in the search results or collection, from which the asset was selected.

3. **Asset Stars**
   Shows the star rating for the current asset. Is editable by clicking on desired star to change. Ex. Click the second star to rate it 2.

4. **Asset**
   Area that displays current asset as large as possible in the area based on asset's height and width with no cropping or masking. A square image is shown in the mock-up to the left. This is identical behavior to MX Basic.

5. **Enlarge Asset Button**
   On click, this will open a modal dialog that shows the image as large as possible in the browser window. Again there is no cropping or masking. The user can close the modal to return to the asset view.

6. **Asset Metadata - Quick Look Panel**
   A tabular display of all the asset's associated metadata. The user can edit which metadata fields are visible in the table by clicking the "cog" icon, which then invokes a modal where the user can show/hide and arrange the fields. This module will vertically scroll if necessary to show all metadata content.

7. **Asset Rights - Quick Look Panel**
   A tabular display of all the asset's associated rights metadata. The user can edit which fields are visible in the table by clicking the "cog" icon, which then invokes a modal where the user can show/hide and arrange the fields. This module will vertically scroll if necessary to show all content.

8. **Asset Versions**
   A tabular display of all the asset's versions that will scroll if necessary. The current version of record is always shown first and is highlighted with color. Versioning options are accessed through the "cog" icon, and a new version can be created via click of the "plus" icon. Both will invoke a corresponding modal dialog allowing the user to select options. Additional versions, if any, will show below the current version ordered by date of version creation (most recent first). A user can view any previous version by clicking the row of the desired version, which will load the asset detail page of that version. The version being viewed will have the "eye" icon visible in the row.

9. **Asset Usage Info**
   Identical to the usage info in MX, but with a more user friendly display. User may click any row to edit/update the info.
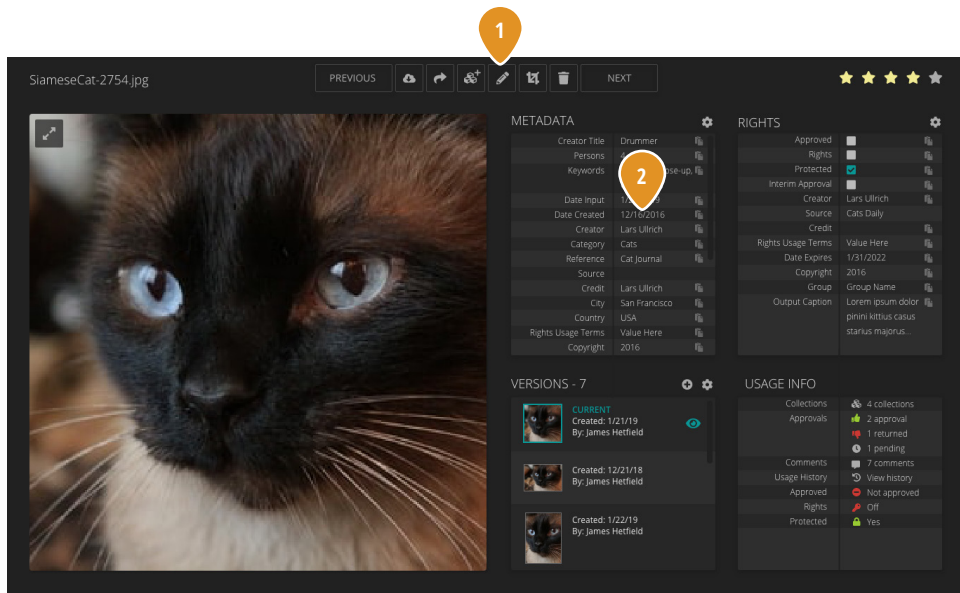
ASSET DETAIL - ENLARGED MODAL

1. **Enlarged Asset**
   The enlarged asset modal dialog shows on click of the enlarge asset button. The image displays as large as possible in the browser window. Again there is no cropping or masking.

2. **Close Enlarged Asset Button**
   On click, closes the dialog returning the user to the asset view.

ASSET DETAIL - EDITING RIGHTS / METADATA

1. **Edit Asset Button**
   There are two paths by which the user is able to edit the associated rights/metadata of the asset. The first way is by clicking the "pencil" button in the asset toolbar. This will invoke the edit asset modal dialog that allows for editing of this single asset, or continued editing of previous and subsequent assets.

2. **Click of Metadata Row**
   This will invoke the edit asset modal dialog *with the selected field already in focus* that will allow for quick editing of this single field, and continued editing if desired.

ASSET DETAIL - EDIT MODAL

1. **Selected Asset Title**
   Simple text showing the selected asset's title as a reference for the user. User may edit title in the metadata form below.

2. **Asset Cover Flow Selector**
   This shows a highlighted thumbnail of the currently selected asset in the center with the previous and next asset (in search or collection) on either side, smaller with opacity at 75% . The user, if desired, can click either of the assets to the side to load that one in to the currently edited slot. They can also scroll left and right via click of the left right arrows which will advance one in the direction clicked.

3. **Editable Fields**
   The user can edit any editable fields they have permissions for, vertically scrolling as necessary to reveal the content. Rules for field editing are the same as in MX and MX Basic. The visible fields can be edited via the "cog" as discussed on the previous page.

4. **Cancel Button**
   On click, closes the modal with no changes being saved.

5. **Save and Next Button**
   On click, saves any edits to the data for current asset and loads data for the next, allowing the user to edit multiple assets without having to load a separate edit menu for each one.

6. **Save Button**
   On click, saves the edited data for the active asset and closes the modal dialog, returning the user back to the asset page.
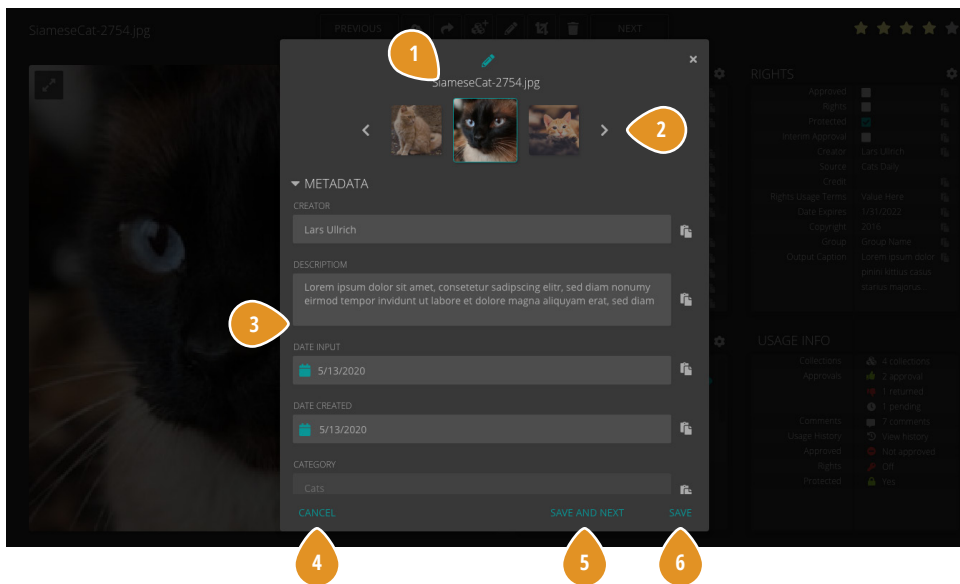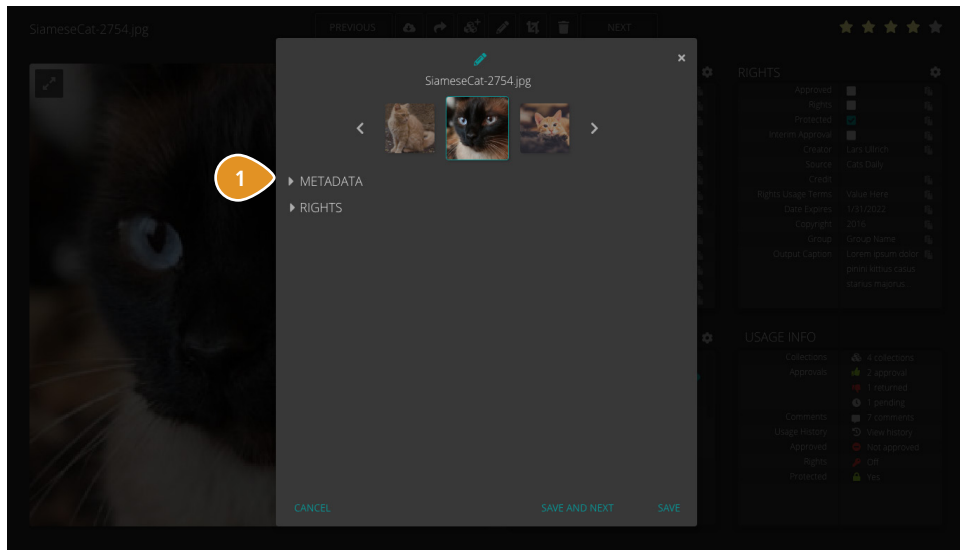
ASSET DETAIL - EDITING RIGHTS / METADATA CONT'D

1. **Field Toggle**
    On click, collapses/expands the editable fields in the rights/metadata modal. This is in case the user does not want view all the fields. The example to the left shows how this will look with both closed. Click of the label will, once again expand the fields to allow editing. Toggling will not discard edits.

ASSET DETAIL - RIGHTS / METADATA SETTINGS
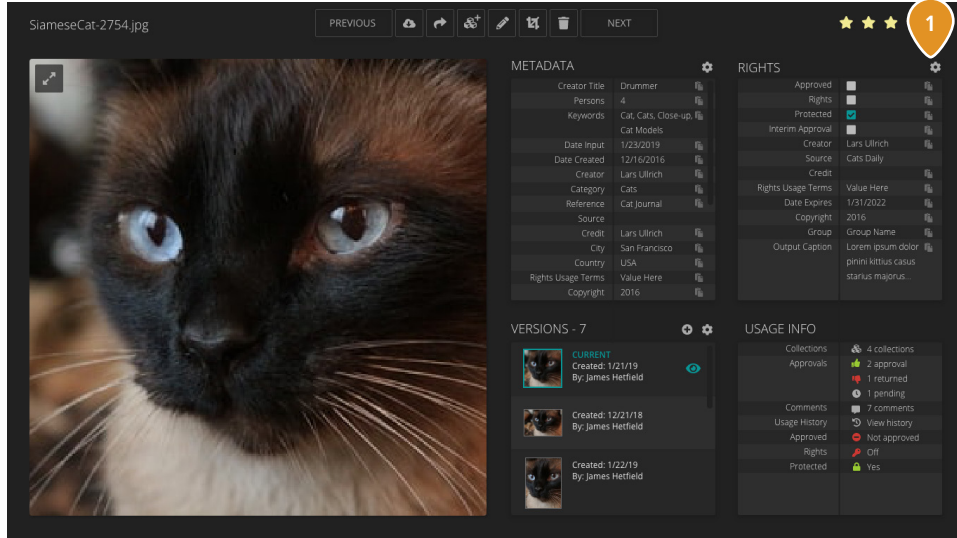
1.   Edit Rights/Metadata Settings Button
The user can edit which fields are visible in the table by clicking the "cog" icon, which then invokes a modal where the user can show/hide and arrange the fields. The selected example to the left shows the Rights fields. Editing of metadata fields will be an identical process.

2.   Selected/In Use Column
The left column of the modal displays label tags for each field currently in use/visible for all assets. Users may drag and drop label tags between the two columns to show or hide them. To ensure this works well for touch devices, users may also click/tap the "+" button to move a label tag to the left column to show, or, click/tap the "minus" button to move it to the right column to hide.

3.   Hidden/Not In Use Column
The right column shows fields which are currently not in use/hidden. Users may drag and drop label tags between the two columns to show or hide them. To ensure this works well for touch devices, users may also click/tap the "+" button to move a label tag to the left column to show, or. click/tap the "minus" button to move it to the right column to hide.

**4.   Label Tag - Reordering**
The label tags may also be dragged up or down in the left column to control the order in which the fields are displayed.

5.   Cancel Button
Click/tap of the cancel button closes the modal dialog and discards any changes made, returning the user to the asset detail screen.

6.   Save Button
Click/tap of the save button saves any changes and closes the modal dialog. User is returned to the asset detail screen and the any changes made to field visibility and/or order are visible.
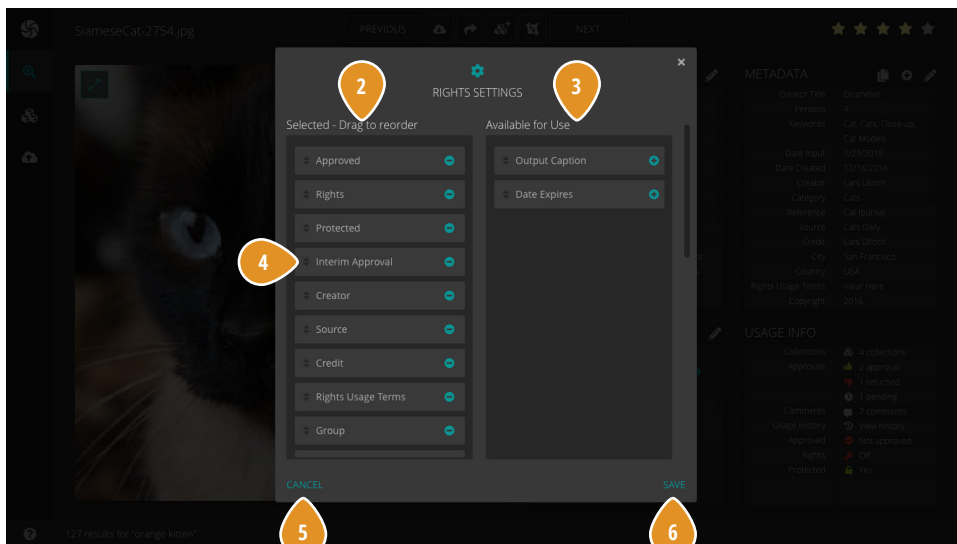
MOVING FROM MX AND BASIC TO NEO

This is a very basic overview of steps needed to be taken, some of which have been started, in order to move to Neo. There are many steps within each of these steps, but this serves as an overarching look at the process from a non-developer's point of view.

1. **Start with the Basic Things**
   The most efficient and foolproof way to begin the transition to Neo is to start at the MX Basic component level. If you think of the smallest and, what may feel like inconsequential components, convert them to Neo's look and functionality, you will get the building blocks in place for Neo conversion. This will be the most tedious process.

2. **Parallel Growth**
   Basic and Neo are now set up on parallel code bases, so as new MX functionality is migrated to Basic, it will seamlessly flow into Neo. This will allow us to build Neo while still working on MX migration of functionality.

3. **New Backened Code**
   Develop/edit any backend code needed to meet Neo functionality requirements.

4. **HTML Strip Away and Build**
   Break down the DOM structure to only the component level, removing no longer needed structural elements.

5. **Build New HTML DOM Structure**
   Create the new Neo DOM structure for it's layout requirements and place components with. Because the components are already Neo-friendly, we should be able to use them anywhere in the new structure as needed.

6. **Testing and QA**
   Once the new DOM structure is in place, test, test, test to ensure every component, menu, etc. is working properly.