

# Customizing Portal Menu

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intellicus

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## **Acknowledgements**

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For details, visit: <http://www.intellicus.com/acknowledgements.htm>

Contents

Customizing Intellicus	4
Using Portal Menu Configuration page	4
Customizing Portal Menu	5

# Customizing Intellicus

As an administrator, you can customize portal menu according to organizational needs. You can customize the appearance of the Intellicus user interface by showing/hiding menu items, sub items, and features for a selected User, Role and Organization. To open the tab for configuring Portal Menu, go to Navigate > Administration > Configure > Portal Menu.

## Using Portal Menu Configuration page

You can customize (configure) Portal Menu for the following:

- **Default:** Applied when no configuration is set or system configuration is lost / deleted.
- **System:** Applied to all the users/roles of all the organization for whom custom configuration is not setup.
- **Organization:** Applied to all the users/roles of an organization for whom custom configuration is not setup.
- **Users/Roles:** Applied to the user/role for which it is created.

When you open configuration page, **System** configuration is displayed. A configuration can be:

- Opened, so that it can be edited.
- Saved for (and so applied to) one or multiple organizations and users.
- Deleted for one or multiple organizations and user

## Buttons on Configuration page

Configuration page of Portal has following buttons on it:

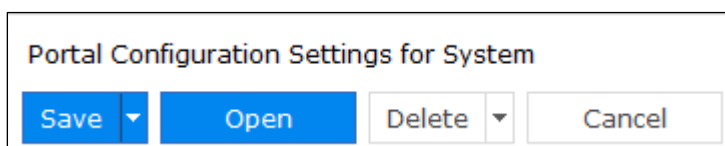


Figure 1: Buttons on Configuration page

- **Save:** To save configuration changes for System, selected organization or user (the one that is open)
- **Save For:** To open **Save Configuration** dialog, select the entities and save the changes in all selected entities.

**Note:** Click the down arrow on **Save** button to get **Save For** option.

- **Open:** To open **Open Configuration** dialog and select an entity to open its configuration information.
- **Delete:** To delete the open configuration information (default or selected entity).
- **Delete For:** To open **Delete Configuration** dialog and select the entities to delete.

**Note:** Click the down arrow on **Delete** button to get **Delete For** option.

- **Cancel:** To cancel the configuration changes and return to opened / last saved status.

## Customizing Portal Menu

You can do the following in portal menu customization:

- Portal's UI related properties
- Menu structure (add or remove menu options)
- Text of menu pad and options

Use this page to customize menu and menu options for the portal. You can create up to three level of menu structure:

- Top level menu (menu pad)
- Second level menu (menu options)
- Third level menu (tabs)

The screenshot displays the 'Portal Configuration Settings for System' window. On the left, a tree view under 'Portal Menu' shows a hierarchy: Portal > Analytics (Dashboard, High Speed View, Smart View) > Reports > Design (Dashboard Widget, Ad hoc Report, Analytical Object, Query Object, Parameter Value Groups, Parameter Object, Studio Report, Ad hoc Template) > Schedule (Jobs, Jobs Execution Status) > Notify (Subscribe, View Alerts) > Repository (Deploy Repository Bundle, iPackager, Manage Folders and Reports, Report Objects). The right pane, 'Portal Properties', contains various settings: Help Style (Popup), Calendar Style (Inline), Multi-Select Parameter list size (8), Email Option (Both), DB Meta Data list size (1000), Page Size (100), Report viewer target (Child Frame), Multi-Select Param List All Check (Send Values), checkboxes for 'Allow set session level database connection' and 'Allow refresh data', an 'Error Support URL' field, a 'Menu' section with Style (Slide), Width, and Height fields, and List Menu Style (Float Fishey). Below this is the 'Parameter Form' section with Run Button Position (Bottom) and Run Button Alignment (Right), and an unchecked 'Allow parameter form saving' checkbox. A note at the bottom states: 'Note - Availability of a feature will depend on license and system privileges granted to the user'.

Figure 2: Portal Menu page

Portal menu customization related activities are carried out on **Portal** tab. Click Navigate > Administration > Configure > Portal Menu.

**Note:** If Intellicus is running under security disabled, specify following URL in the browser's address bar to get this page.  
If you are using the computer used as web server,  
<http://localhost/intellicus/pattern/conf> and then click Portal Menu tab.  
In other cases,  
<http://<IP of the server>/Intellicus/pattern/conf> and then click Portal Menu tab.

When you open the page, by default it opens configuration for "System". Before going ahead, make sure you have opened the right configuration (for "System", organization or the user/role).

When configuration changes are complete, click **Save** (or **Save For**) button to save the configuration.

## Portal Properties

To set these properties, click **Portal** entry in the tree-view.

The screenshot shows the 'Portal Configuration Settings for System' dialog box. On the left is a 'Portal Menu' tree view with 'Portal' selected. The main area is titled 'Portal Properties' and contains the following settings:

- Help Style: **Popup**
- Calendar Style: **Inline**
- Multi-Select Parameter list size: **8**
- Email Option: **Both**
- DB Meta Data list size: **1000**
- Page Size: **100**
- Report viewer target: **Child Frame**
- Multi-Select Param List All Check: **Send Values**
- Allow set session level database connection
- Allow refresh data
- Error Support URL:
- Menu:
  - Style: **Slide**, Width: , Height:
  - List Menu Style: **Float Fisheye**
  - Note: Blank or 0 value of Width and Height indicates default value.
- Parameter Form:
  - Run Button Position: **Bottom**, Run Button Alignment: **Right**
  - Allow parameter form saving

Note - Availability of a feature will depend on license and system privileges granted to the user

Figure 3: Portal Properties area on Portal Menu page

- **Help Style:** Select how help page should open. Select *Popup* to open help in a separate window. Select *Inline* to open help within browser window.
- **Calendar Style:** Select how calendar should open. Select *Popup* to open calendar in a separate window. Select *Inline* to open calendar within browser window.
- **Multi-Select Parameter list size:** Specify the number of parameter values that you want to display at a time on run time parameter page.
- **Email Option:** Set the way report should be sent when e-mail report delivery option is selected on **Report Delivery Options** page. Select **Both** to get option button to select any one between *Link* and *Attachment*. Select **Link** to have only *Link* as an option. Select **Attachment** to have only *Attachment* as an option.
- **DB Meta Data list size:** Specify the number of entries that should be listed in a page. Effect can be viewed on **SQL Editor** and **Secure Data > Schema View** page. Changes made here will come into effect after the report server is re-started, or respective data connection is updated (so that metadata is cached).
- **Page Size:** Specify the number of entries / records that should be listed on a page (for example, Task list and Job list). Set it to 0 to get all the entries on the page at a time.
- **Report viewer Target:** Useful for reports having user parameters. Select *Same Frame* to use facility of collapsible parameter input form. If *Child Frame* is selected, user will have to navigate to report listing in order to re-run the report.
- **Multi-Select Param List All Check:** To set the values to be sent when for All check box on Input Parameter Form is checked for multi-select parameters. Select *Send Values* to send all the values. Select *All* to send 'All' string.
- **Allow set session level database connection:** Select this check box to get **Connection To** icon (the 1st icon after the last menu). If this checkbox is unchecked (clear) the user will not be able to set Session level database connection.
- **Allow refresh data:** Select this check box to get **Refresh Report** button on **Report Delivery Options** page and on HTML toolbar when a report is run in HTML output type.

## Managing Errors

In case the requested operation is not completed, Intellicus displays an error page.

This page is designed to contain the entire sequence of the errors that resulted in the final error. Each error may have error number. You can setup a URL that will open when a user clicks respective error number.

### Error Support URL

To provide a URL that should open when the user clicks error number. If this is kept blank, error number will not appear as hyperlink.

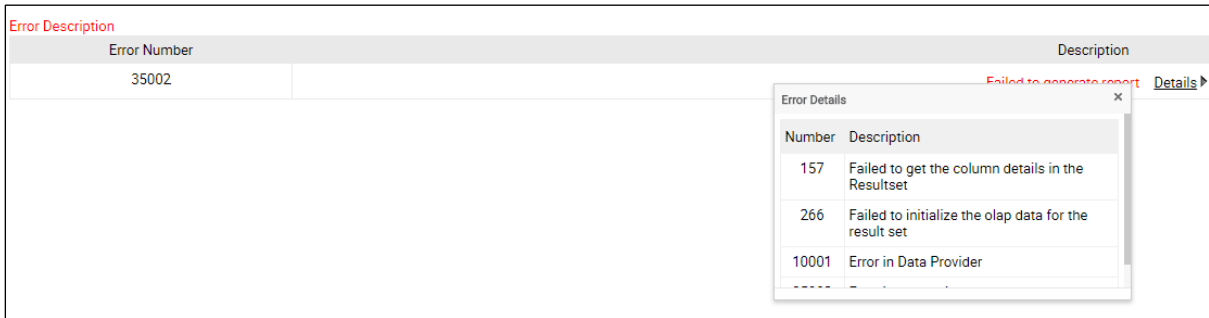


Figure 4: Error codes without hyperlink effect

## Menu

You can customize the way menu should appear throughout the portal. Below mentioned are the options that can customize the menu styles:

- **Style:** Default is *Slide*, in which menu slides out from left of the page. Select *Tabbed* to get menu options placed side by side. Select *Drop Down* to get menu options one below other.

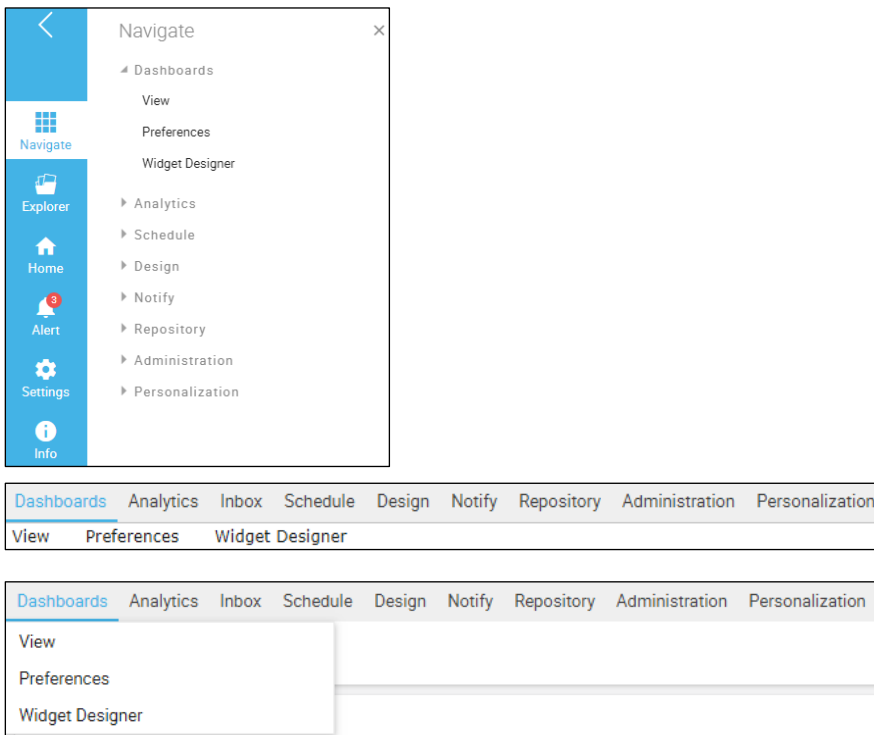


Figure 5: Effect of Menu style – Slide, Tabbed and Drop down

- **Width:** In case of drop down style, specify width of the menu option.
- **Height:** In case of drop down style, specify height of the menu option.
- **List Menu Style:** Select Toolbar to show the list menu as toolbar. Select Float Fisheye to list the menu as fisheye. Select 'Both' to show menu list as toolbar and float fisheye.

**Menu Style** Width  Height

**List Menu Style** Note - Blank or 0 value of Width and Height is default value.

Slide ▼  
 Float Fishey ▼  
 Toolbar  
 Float Fisheye  
 Both

Figure 6: List Menu Style

Sr.No.	Report Name	Action	Execution Type	Completion Status	Completion Date
1	Demo/Demo Sales Contribution	VIEW	DIRECT	Success	02/07/2018 17:12:01

Figure 7: List Menu Style-Toolbar

Sr.No.	Report Name	Action	Execution Type	Completion Status	Completion Date
1	Demo/Demo Sales Contribution	VIEW	DIRECT	Success	02/07/2018 15:47:04

Figure 8: List Menu Style-Float Fisheye

Sr.No.	Report Name	Action	Execution Type	Completion Status	Completion Date
1	Demo/Demo Sales Contribution	VIEW	DIRECT	Success	02/07/2018 17:12:01

Figure 9: List Menu Style-Both

### Parameter Form

You can customize the appearance of the buttons on Parameter Form when executing a parameterized report.

**Parameter Form**

Run Button Position Run Button Alignment

Bottom ▼ Right ▼

Allow parameter form saving

Figure 10: Parameter Form



- **Run Button Position:** The 'Run Now' button in Input Parameter form can be placed at either Bottom or Top. It can also be placed at both bottom and top.

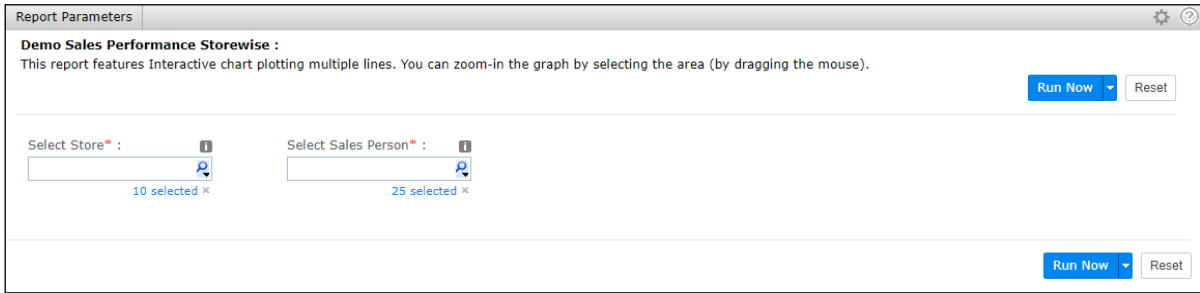


Figure 11: Run Button Position-Both

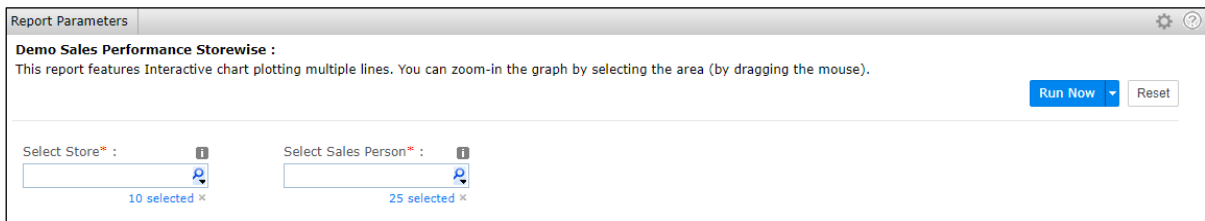


Figure 12: Run Button Position-Top

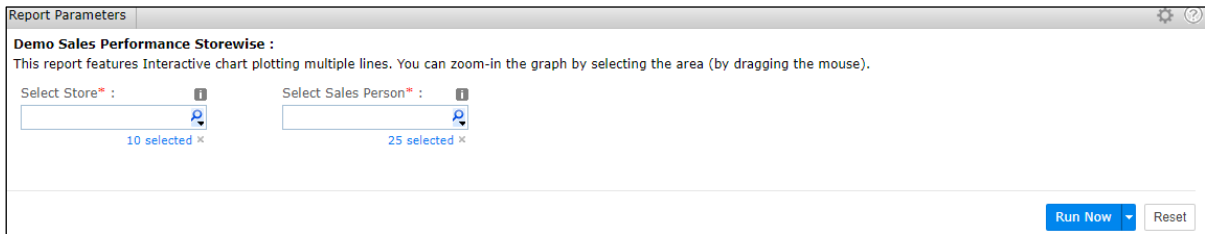


Figure 13: Run Button Position-Bottom

- **Run Button Alignment:** The 'Run Now' button in Input Parameter form can be placed on the Right, Left or Center of the Page.

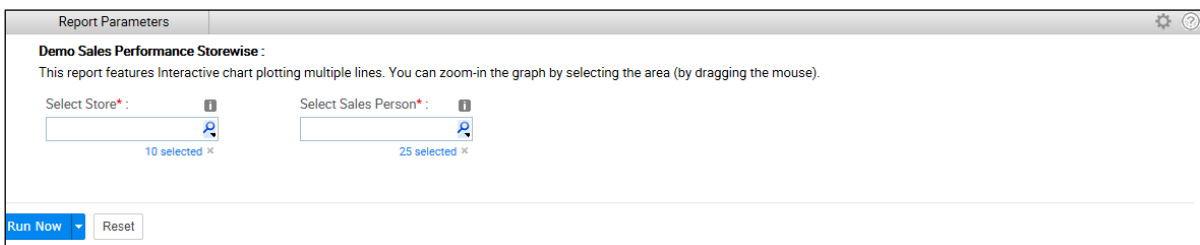


Figure 14: Run Button Alignment-Left

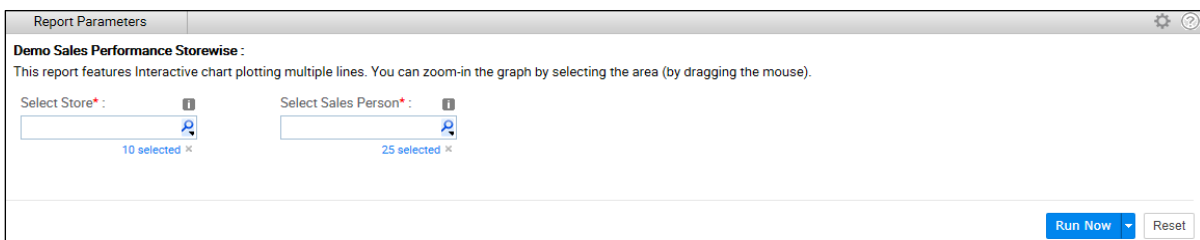


Figure 15: Run Button Alignment-Right

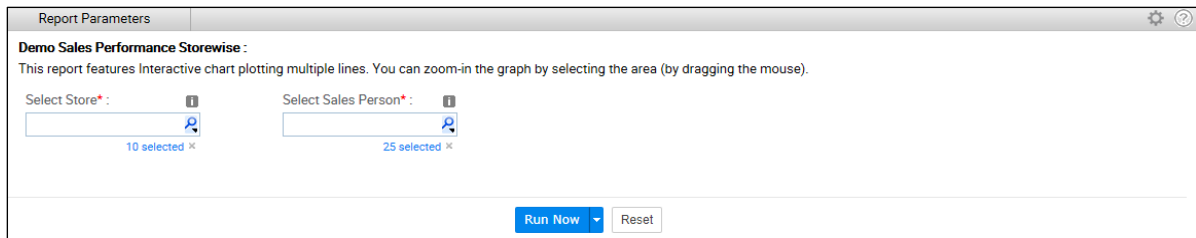


Figure 16: Run Button Alignment-Center

## Menu Item Properties

You can customize the way various menu items like Dashboards, Analytics, Schedule etc. should appear throughout the portal. The various properties under menu items of the Portal Menu are discussed below:

- **Name:** A name to uniquely identify this menu item. This cannot be left empty.
- **Caption:** Caption that should appear on menu / tab option.
- **Short cut for Security mode off:** The short cut to be used when application runs with security disabled. In this case, the specified pattern shall be used to launch the portal as `http://<IP of the server>/Intellicus/pattern`
- **Tooltip:** Tool-tip for the menu tab.
- **Security Mode:** Set this to ON, to display the use case when Intellicus runs in security enabled (ON), i.e. when the user needs to be authenticated. Set it to OFF to display it in security disabled (OFF). Set it to Both, to show the use case in both the modes. This property is visible on the portal when `SMCONFIGURABLE="TRUE"` is set under `<Intellicus Installation Location>\Intellicus\Jakarta\webapps\intellicus\client\config\PortalUseCases.xml`

## Link To

- **Use case:** Select the functionality with which the menu / tab option is to be associated.
- **Visible in security mode:** This is the default value for making this use case visible. *ON*: Visible when security is enabled (On). *OFF*: Visible when security is disabled (OFF). Set it to Both, to show the use case in both the modes. This property can be set from `<Intellicus Installation Location>\Intellicus\Jakarta\webapps\intellicus\client\config\PortalUseCases.xml`
- **Security mode configurable:** Indicates if security mode is configurable or not. *True*: Can be configured. *False*: Cannot be configured. This property can be set from `<Intellicus Installation Location>\Intellicus\Jakarta\webapps\intellicus\client\config\PortalUseCases.xml`
- **Accessible to:** Access privileges user / role needs to have to be able to get this use case.
- **System Privilege:** System Privilege user / role needs to have to be able to get this use case.
- **Option(s):** Specify properties like Refresh Dashboard as True or False to enable automatic refreshing of the dashboard after the specified interval.  
You can also specify Auto refresh interval to refresh the Performance Monitor page on the portal.

## Reports Option(s)

<b>Option(s)</b>	
Show report type	All ▼
Show new Ad hoc option	True ▼

Figure 17: Options for Reports page

The menu item properties specific to Reports are listed below:

- **Show report type:** Select the type of reports that should appear on report list: Select *All*, to list Ad hoc reports, Standard reports as OLAP reports, select a report type to view only that type of reports.
- **Show new Ad hoc option:** Select TRUE to have New Report button on Report List page.

You can choose the report operation(s) and column(s) that you wish should appear on the Report Listing page.

<b>Report Operation(s)</b>		<b>Report Column(s)</b>	
Run Publish	» > < «	Run In Background ReRun Schedule Customize Delete	» > < «
		Owner Query Object Last Modified Date	Sr.No. Selection Type Description

Figure 18: Report Operation(s)/Column(s)

## Performance Monitor Option(s)

<b>Option(s)</b>
Auto refresh interval <input type="text" value="30"/> (Secs)

Figure 19: Options for Performance Monitor

Option specific to Performance Monitor is as below:

- **Auto refresh interval:** Specify the number of seconds after which the **Performance Monitor** page should be refreshed.

## Adding a top level menu item

Portal Configuration Settings for System

Save Open Delete Cancel

Portal Menu

- Portal
  - Analytics
    - Dashboard
    - High Speed View
    - Smart View
  - Reports
  - Design
    - Dashboard Widget
    - Ad hoc Report
    - Analytical Object
    - Query Object
    - Parameter Value Groups
    - Parameter Object
    - Studio Report
    - Ad hoc Template
  - Schedule
    - Jobs
    - Jobs Execution Status
  - Notify
    - Subscribe
    - View Alerts
  - Repository
    - Deploy Repository Bundle
    - iPackager
    - Manage Folders and Reports
    - Report Objects

Portal Properties

Help Style:  Calendar Style:

Multi-Select Parameter list size:  Email Option:

DB Meta Data list size:  Page Size:

Report viewer target:  Multi-Select Param List All Check:

Allow set session level database connection  Allow refresh data

Error Support URL:

Menu

Style:  Width:  Height:

List Menu Style:

Note - Blank or 0 value of Width and Height indicates default value.

Parameter Form

Run Button Position:  Run Button Alignment:

Allow parameter form saving

Note - Availability of a feature will depend on license and system privileges granted to the user

Figure 20: Adding a top level item

To add a top level menu item in the Portal Menu, you need to follow the below steps:

1. In tree view, click **Portal**, the top-level item.
2. Click **+** button. A Menu Item Properties page comes up (as shown in Figure 21).
3. In **Name**, specify a name to uniquely identify the item.
4. In **Caption**, specify the text that should appear on the menu item.
5. In **Tooltip**, specify the text that should appear as tool-tip for this item.
6. In **Use Case** under **Link To**, select the use case (functionality) with which the menu / tab option is to be associated.
7. In **Short cut for Security mode off** entry box specify the text that should be appended to get this page in security mode off (Users will prefix /pattern/ to this string).
8. Specify **Alternate Caption(s)** if required. Alternate captions along with its tooltip for various entities on the portal can be set differently for users with different system privileges.
9. Click **Save** (or **Save For**) button to save the configuration.

**Note:** Keep the **Use Case** dropdown box empty, if you want to create options under the selected item.

## Adding a second level menu item

Portal Configuration Settings for System

Save Open Delete Cancel

Portal Menu

- Portal
  - Analytics
    - Dashboard
    - High Speed View
    - Smart View
    - New Item**
  - Reports
  - Design
    - Dashboard Widget
    - Ad hoc Report
    - Analytical Object
    - Query Object
    - Parameter Value Groups
    - Parameter Object
    - Studio Report
    - Ad hoc Template
  - Schedule
    - Jobs
    - Jobs Execution Status
  - Notify
    - Subscribe
    - View Alerts
  - Repository
    - Deploy Repository Bundle
    - iPackager
    - Manage Folders and Reports

Menu Item Properties

Name:  Caption:

Tooltip:

Link To

Use Case:

Visible in security mode : BOTH

Security mode configurable : false

Accessible to : Normal, Admin and Super Admin

System Privilege :

Alternate Caption(s)

Caption	Tooltip	User	System Privilege
<input type="text" value="New Item"/>	<input type="text" value="New Item"/>	<input type="text" value="ALL"/>	<input type="text"/>

Figure 21: Adding a node under second level menu item

To add a second level menu item in the Portal Menu, you need to follow the below steps:

1. In tree view, click the top-level item under which you want to create an option.
2. Click button. A Menu Item Properties page comes up (as shown in Figure 22).
3. In **Name**, specify a name to uniquely identify the item.
4. In **Caption**, specify the text that should appear on the menu item.
5. In **Tooltip**, specify the text that should appear as tool-tip for this item.
6. In **Use Case** under **Link To**, select the use case (functionality) with which the menu / tab option is to be associated.
7. In **Short cut for disabled Security mode** entry box specify the text that should be appended to get this page in security mode off.
8. Specify **Alternate Captions** if required.
9. Click **Save** (or **Save For**) button to save the configuration.

## Adding a third level menu item

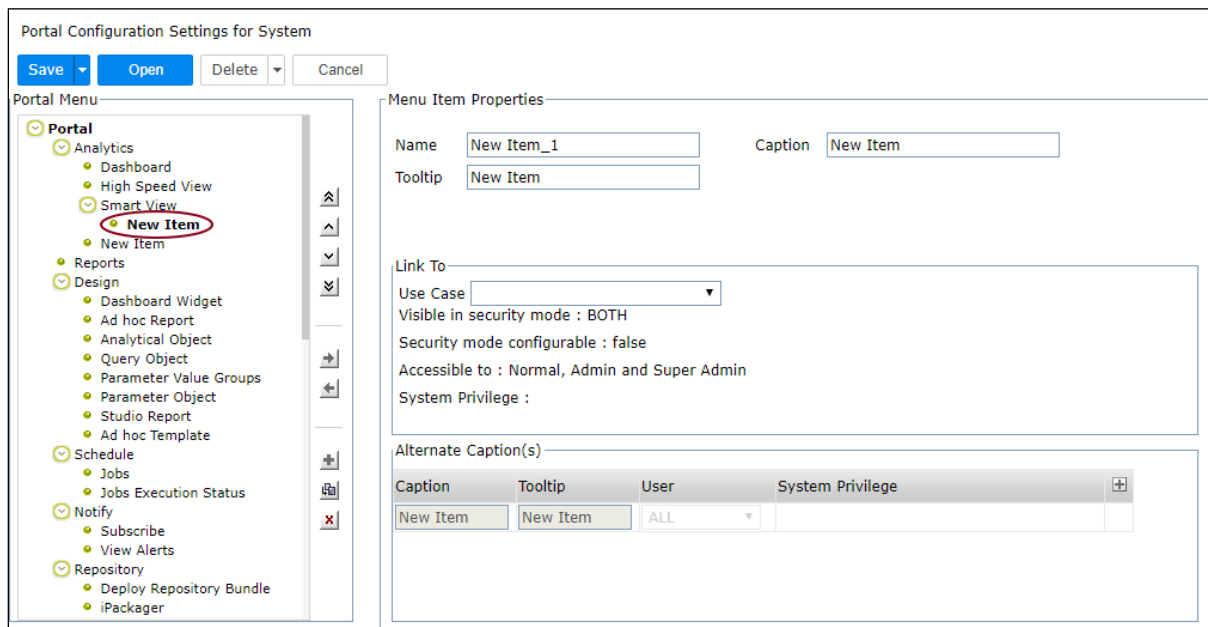




Figure 22: Adding a node under third level

To add a third level menu item in the Portal Menu, you need to follow the below steps:


1. In tree view, click the second level item under which you want to create an option.
2. Click  button. A Menu Item Properties page comes up.
3. In **Name**, specify a name to uniquely identify the item.
4. In **Caption**, specify the Text that should appear on the menu item.
5. In **Tooltip**, specify the text that should appear as tooltip for this item.
6. In **Use Case** under **Link To**, select the use case (functionality) with which the menu / tab option is to be associated.
7. In **Short cut for Security mode off** entry box specify the text that should be appended to get this page in security mode off.
8. Specify **Alternate Captions** if required.
9. Click **Save** (or **Save For**) button to save the configuration.

## Deleting an item

1. From the tree view on the left of the page, click the item to be deleted.
2. Click  button to delete the selected item (along with its child nodes).
3. Click **Save** button to save the changes.


## Creating an item like an existing item

Click the item based on which you want to create another item.

1. Click  button.
2. Make changes where required.
3. Click **Save** button to save the changes.

## Promoting an item


The item is promoted along with its child nodes. After promoted, the item is placed just after and parallel to its existing parent node.

1. Click the item that needs to be promoted.
2. Click  button.
3. Click **Save** button to save the changes.

## Demoting an item





The item being demoted (along with its child nodes) is placed as a last child item in the node that was just below it before demotion.

If an item placed at the second level is demoted and needs to be placed under a leaf node, that node will lose its attached use case.

1. Click the item that needs to be demoted.
2. Click  button.
3. Click **Save** button to save the changes.

## Changing location of an item

Select the item and click any of the buttons given below for respective type of movement:

- : Move to upper menu of current parent
- : Move up
- : Move Down
- : Move to lower menu of current parent

**Note:** After making changes on this page, don't forget to click **Save** button or **Save For** button depending on the requirement.