Customizing Portal Menu

Version: 16.0

intellicus

Acknowledgements

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

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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

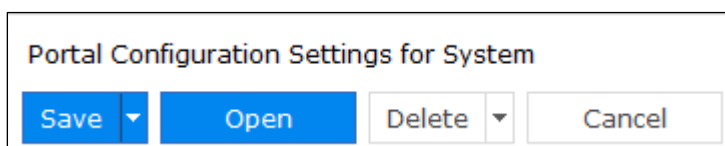Configuration page of Portal has following buttons on it:

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)

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.

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 cashed).
- **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

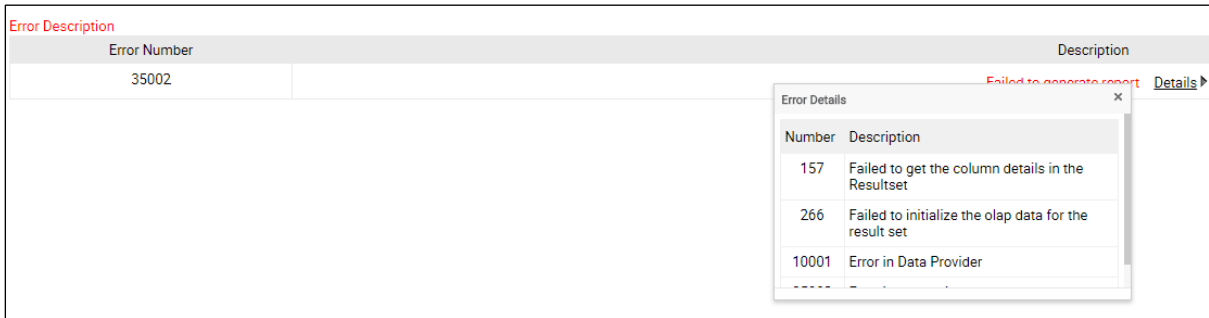To provide a URL that should open when the user clicks error number. If this is kept blank, error number will not appear as hyperlink.

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.
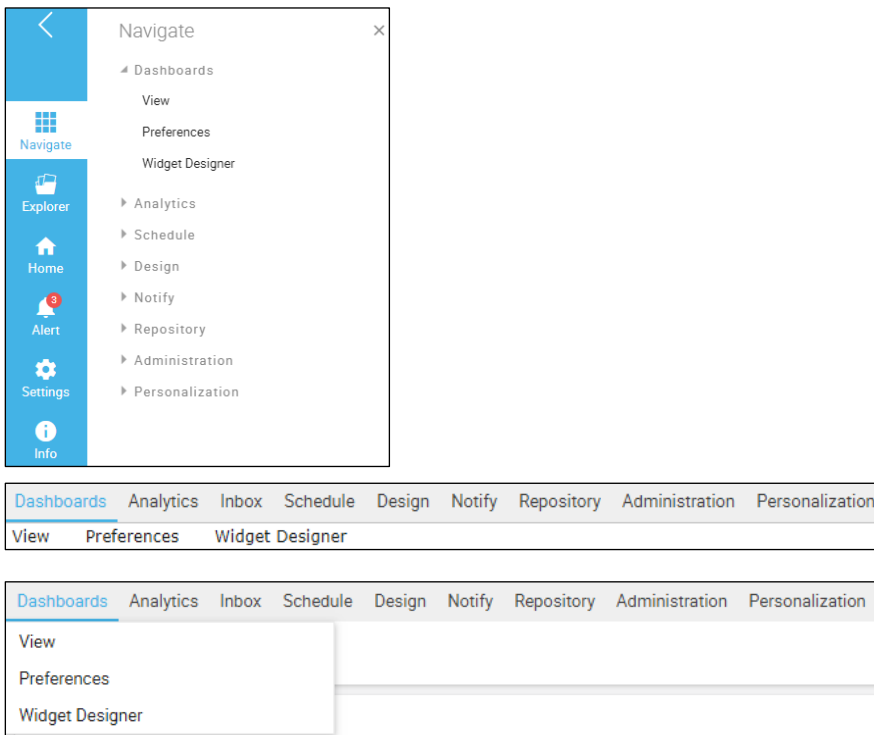

Figure 5: Effect of Menu style – Slide, Tabbed and Drop down

- **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.

Figure 6: List Menu Style

Figure 7: List Menu Style-Toolbar

Figure 8: List Menu Style-Float Fisheye

Figure 9: List Menu Style-Both

Parameter Form

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

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.
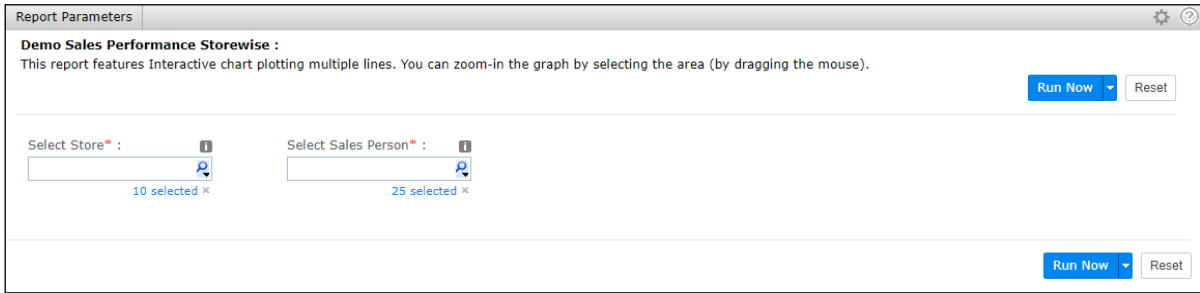
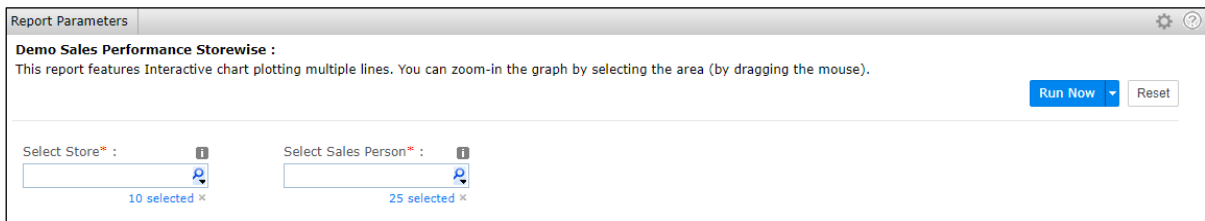

Figure 11: Run Button Position-Both

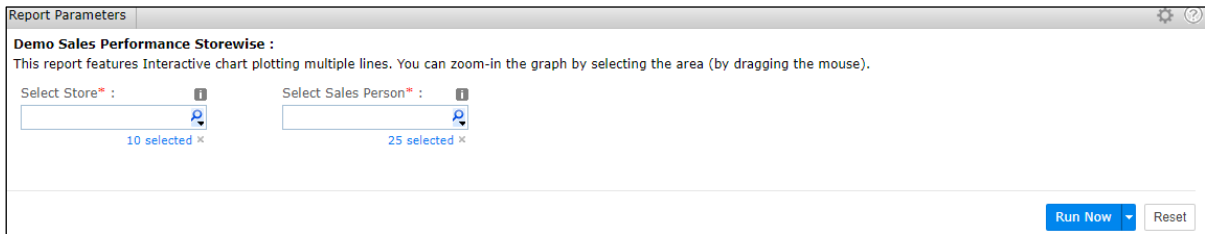*Figure 12: Run Button Position-Top*

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.
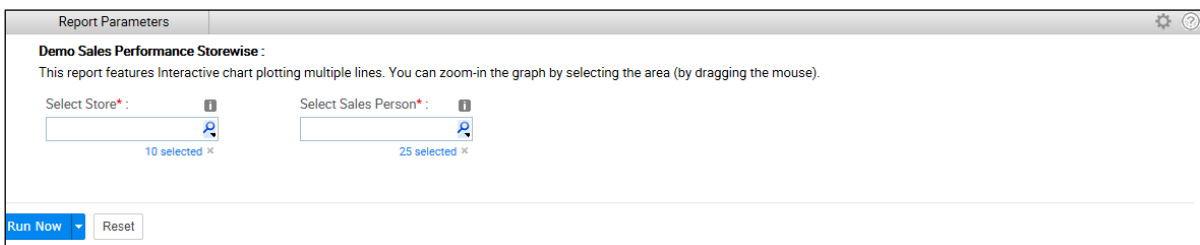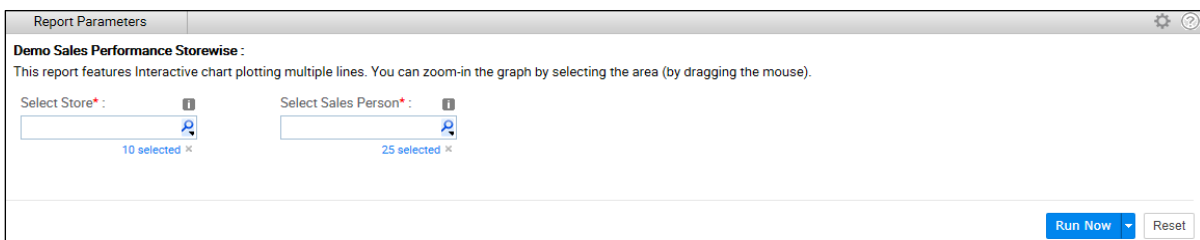

Figure 14: Run Button Alignment-Left

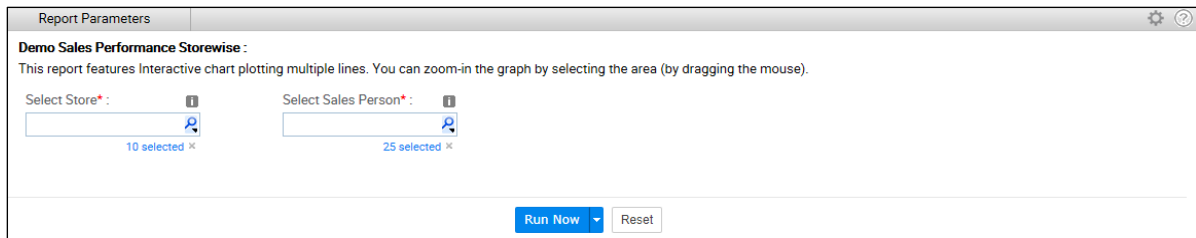*Figure 15: Run Button Alignment-Right*

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)

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.

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

Performance Monitor Option(s)

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

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

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 ![icon] 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.
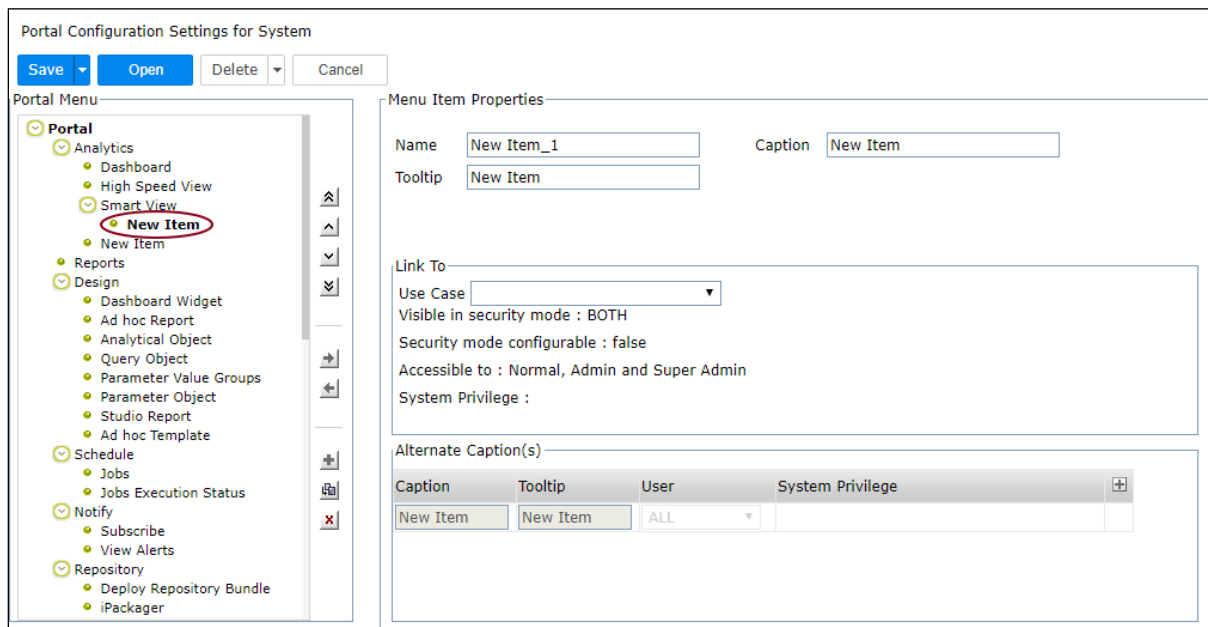
Adding a third level menu item

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 ![x] 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.