



## Customizing Portal Menu

---

Intellicus Web-based Reporting Suite **Version 4.5**

-  Enterprise
-  Professional
-  Smart Developer
-  Smart Viewer

---

Copyright © **2009** Intellicus Technologies

This document and its content is copyrighted material of Intellicus Technologies. The content may not be copied or derived from, through any means, in parts or in whole, without a prior written permission from Intellicus Technologies. All other product names are believed to be registered trademarks of the respective companies.

**Dated: - May 2009.**

## **Acknowledgements**

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

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

---

## Contents

---

<b>Customizing Intellicus .....</b>	<b>3</b>
Using Portal Menu configuration page.....	3
Buttons on Configuration page.....	3
Open Configuration dialog.....	4
Save Configuration dialog.....	5
Delete Configuration dialog.....	5
Customizing Portal Menu .....	6
Portal properties .....	7
Managing Errors .....	9
Menu Item Properties.....	10
Link To.....	10
Options (Reports) .....	11
Options (Performance Monitor) .....	11
Adding a top level menu item .....	12
Adding a second level menu item .....	13
Adding a third level menu item .....	14
Delete an item.....	14
Create an item like an existing item .....	14
Promoting an item.....	15
Demoting an item .....	15
To restore default portal menu for open entity.....	15
Changing location of an item .....	15

---

## Customizing Intellicus

---

As an administrator user can customize portal menu according to organizational needs.

### Using Portal Menu configuration page

You as a super administrator can customize (configure) Portal menu for:

- **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 users.

### Buttons on Configuration page

Configuration page of Portal has following buttons on it:



Figure 1: Buttons on Configuration pages

- **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.

## Open Configuration dialog

This dialog is used to select a configuration (System, of an organization or a user) and open it for edit on Configuration page.

1. Click the option button to select an entity...

2. After selecting the entity, click **OK**.  
The dialog box will close and configuration for the selected entity will appear in Configuration page.

Click **Cancel** to return to Configuration page without opening configuration for the selected entity.

Figure 2: Open Configuration dialog

## Save Configuration dialog

This dialog is used to save configuration information (set on Configuration page) for one or more entities: organizations as well as users.

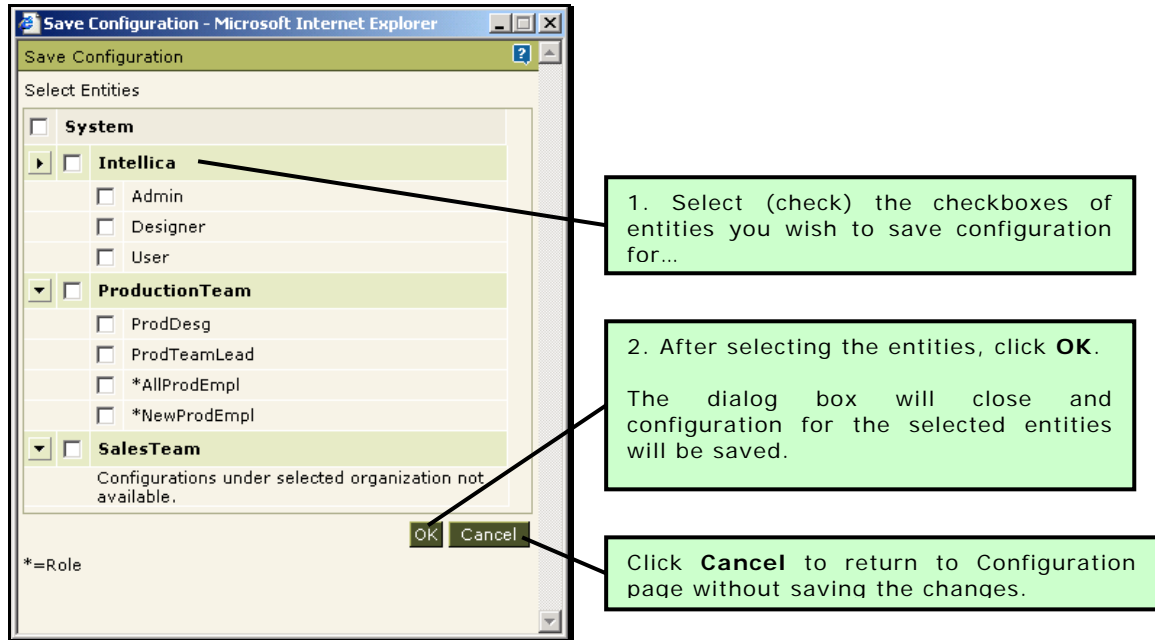


Figure 3: Save Configuration dialog

## Delete Configuration dialog

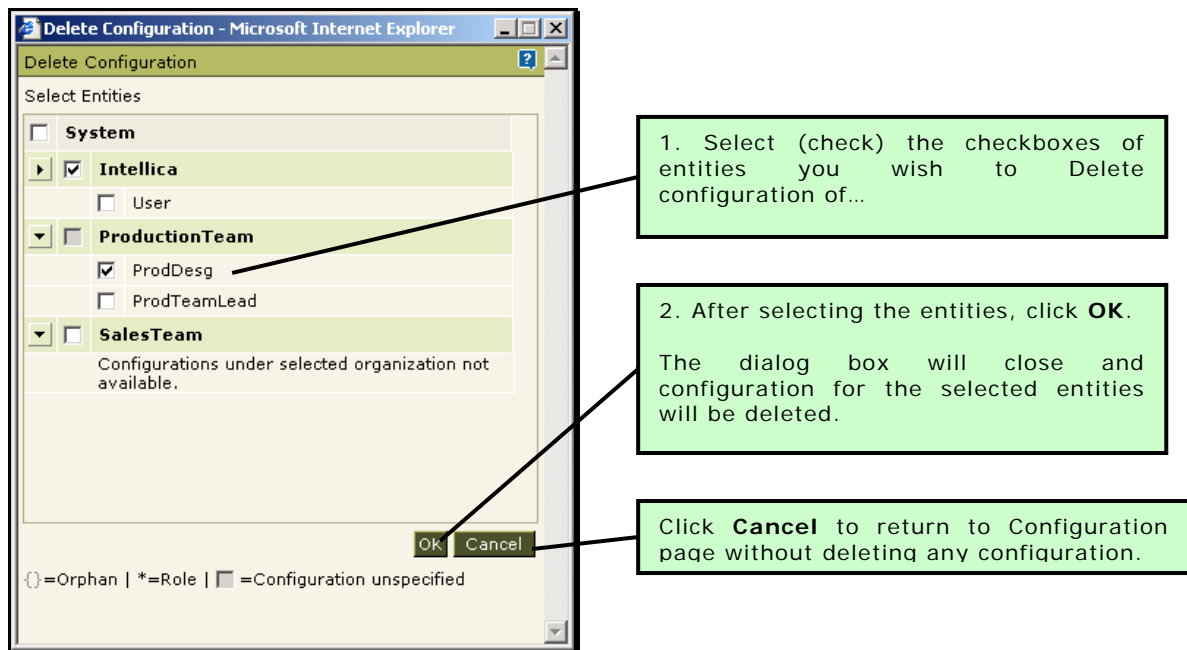


Figure 4: Delete Configuration dialog

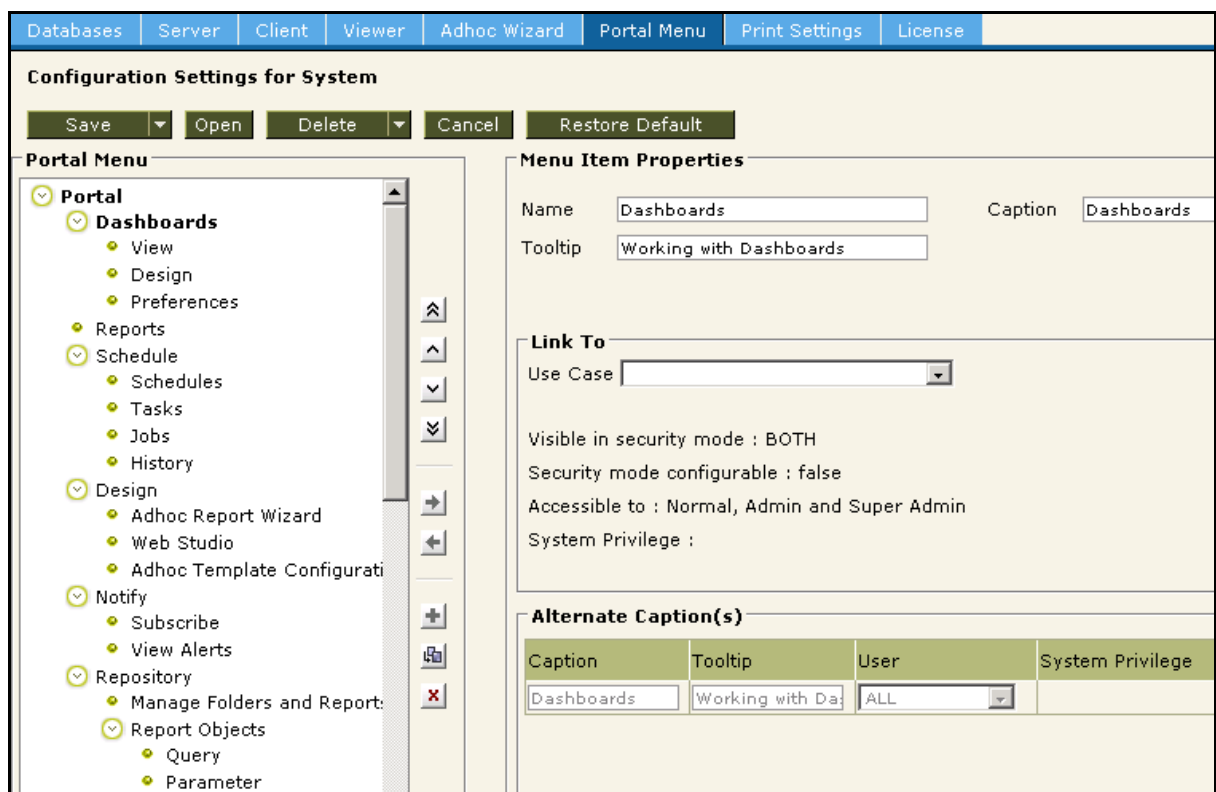
## Customizing Portal Menu

You can do following in portal menu customisation:

- Change some of the portal's presentation related properties
- Change menu structure (add or remove menu options)
- Change 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)



Caption	Tooltip	User	System Privilege
Dashboards	Working with Da	ALL	

Figure 5: Portal Menu page

Portal menu customisation related activities are carried out on **Portal** tab. Click 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 tree-view.

The screenshot shows the 'Portal Properties' configuration form. It contains the following fields and options:

- Help Style:** Dropdown menu set to 'Popup'.
- Calendar Style:** Dropdown menu set to 'Inline'.
- Multi-Select Parameter list size:** Text input field containing '8'.
- Email Option:** Dropdown menu set to 'Both'.
- DB Meta Data list size:** Text input field containing '1000'.
- Page Size:** Text input field containing '100'.
- Report viewer target:** Dropdown menu set to 'Child Frame'.
- Multi-Select Param List All Check:** Dropdown menu set to 'Send Values'.
- Allow set session level database connection:** Checked checkbox.
- Allow refresh data:** Checked checkbox.
- Error Support URL:** Text input field containing 'm/isupport/<%ErrNum%>'.
- Menu:** A sub-section containing:
  - Style:** Dropdown menu set to 'Tabbed'.
  - Width:** Text input field (empty).
  - Height:** Text input field (empty).

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

Figure 6: 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.



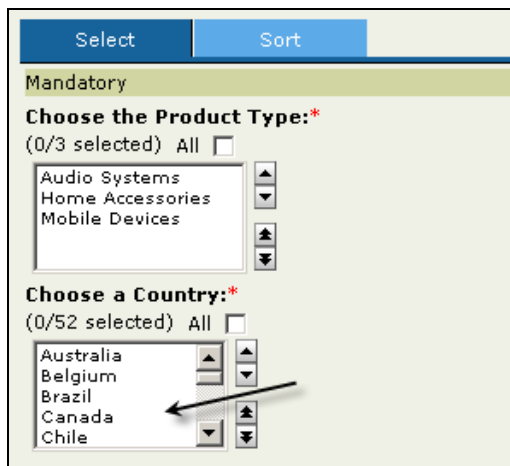


Figure 7: Multi-select parameters with 5 values visible at a time

- **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.

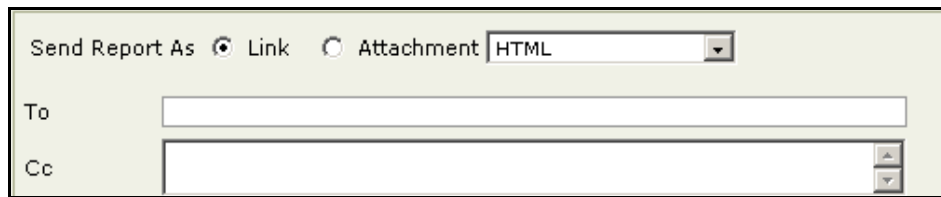


Figure 8: Options to send email with report as Link or Attachment

- **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:** The number of items to be displayed in lists like SQL Editor.
- **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 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.

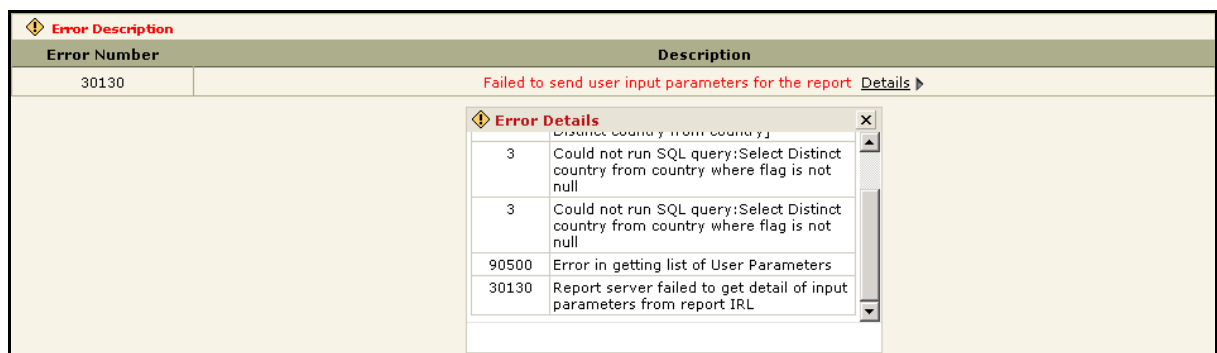


Figure 9: Error codes without hyperlink effect

## Menu

- **Style:** Select *Tabbed* to get menu options placed side by side. Select *Drop Down* to get menu options one below other.
- **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.

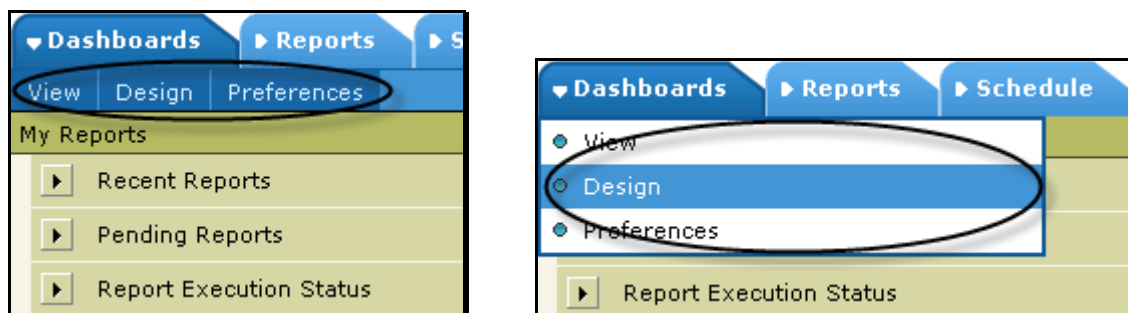


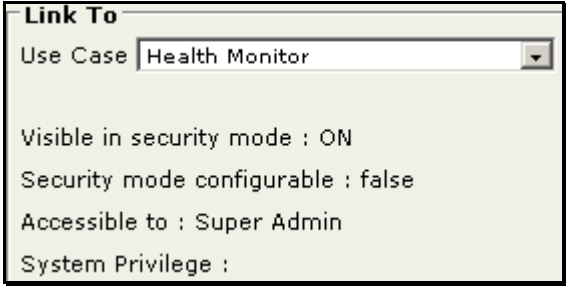
Figure 10: effect of Menu style - Tabbed and Drop down

---

## Menu Item Properties

- **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.
- **Tool-tip:** Tool-tip for the menu / tab.
- **Security Mode:** Set this to ON, to display the use case when Intellicus runs in security enabled (ON). Set it to OFF to display it in security disabled (OFF). Set it to Both, to show the use case in both the modes.

## Link To



**Link To**

Use Case: Health Monitor

Visible in security mode : ON

Security mode configurable : false

Accessible to : Super Admin

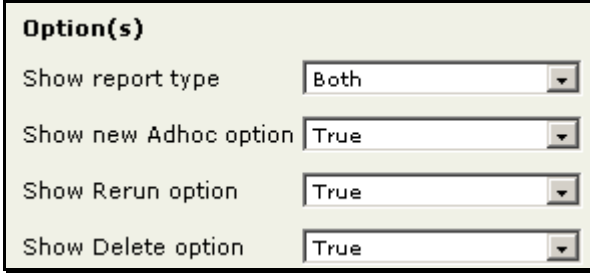
System Privilege :

Figure 11: 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).
- **Security mode configurable:** Indicates if security mode is configurable or not. *True*: Can be configured. *False*: Cannot be configured.
- **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.

---

## Options (Reports)

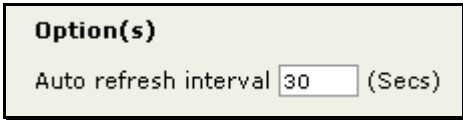


Option(s)	
Show report type	Both
Show new Adhoc option	True
Show Rerun option	True
Show Delete option	True

Figure 12: Options for reports page

- **Show Report Type:** Select the type of reports that should appear on report list: Select Both (Adhoc reports as well as Standard reports), Standard (Standard reports) or Adhoc (Adhoc reports).
- **Show new Adhoc option:** Select TRUE to have New Report button on Report List page.
- **Show Re run option:** Select True to have Re run option on report list page. Select False for not having Re run option.
- **Show Delete option:** Select True to have Delete option on report list page. Select False for not having Re run option.

## Options (Performance Monitor)



Option(s)	
Auto refresh interval	30 (Secs)

Figure 13: Options for Performance Monitor

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

## Buttons

- **Restore Default:** To restore application default portal menu options.
- **Cancel:** To cancel all the changes made after last save.
- **Save:** To save the changed.

## Adding a top level menu item

The screenshot shows the 'Portal Menu' configuration interface. On the left, a tree view shows the 'Portal' menu structure. On the right, the 'Menu Item Properties' panel is active, showing fields for Name, Caption, and Tooltip, all set to 'New Item'. The 'Link To' section includes a 'Use Case' dropdown menu. Below that, security settings are displayed: 'Visible in security mode : BOTH', 'Security mode configurable : false', and 'Accessible to : Normal, Admin and Super Admin'. The 'Alternate Caption(s)' section contains a table with the following data:

Caption	Tooltip	User	System Privilege
New Item	New Item	ALL	

Figure 14: Adding a top level item

1. In tree view, click **Portal**, the top-level item.
2. Click button. Page is cleared.
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) that should be executed.
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 Captions** if required.
9. Click **Save** (or **Save For**) button to save the configuration.



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

## Adding a second level menu item

The screenshot shows the 'Portal Menu' configuration interface. On the left, a tree view shows the 'Portal' menu structure. Under 'Dashboards', a 'New Item' has been added. On the right, the 'Menu Item Properties' panel is visible. It contains the following fields and sections:

- Name:** New Item\_0
- Caption:** New Item
- Tooltip:** New Item
- Link To:** Use Case (dropdown menu)
- Visible in security mode:** BOTH
- Security mode configurable:** false
- Accessible to:** Normal, Admin and Super Admin
- System Privilege:**
- Alternate Caption(s):** A table with columns: Caption, Tooltip, User, System Privilege. The first row contains: New Item, New Item, ALL, and an empty field.

Figure 15: Adding a node under first level menu item

1. In tree view, click the top-level item under which you want to create an option.
2. Click button. Page is cleared.
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) that should be executed.
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.



**Note:** Keep the Use Case dropdown box empty to create options under this item.

## Adding a third level menu item

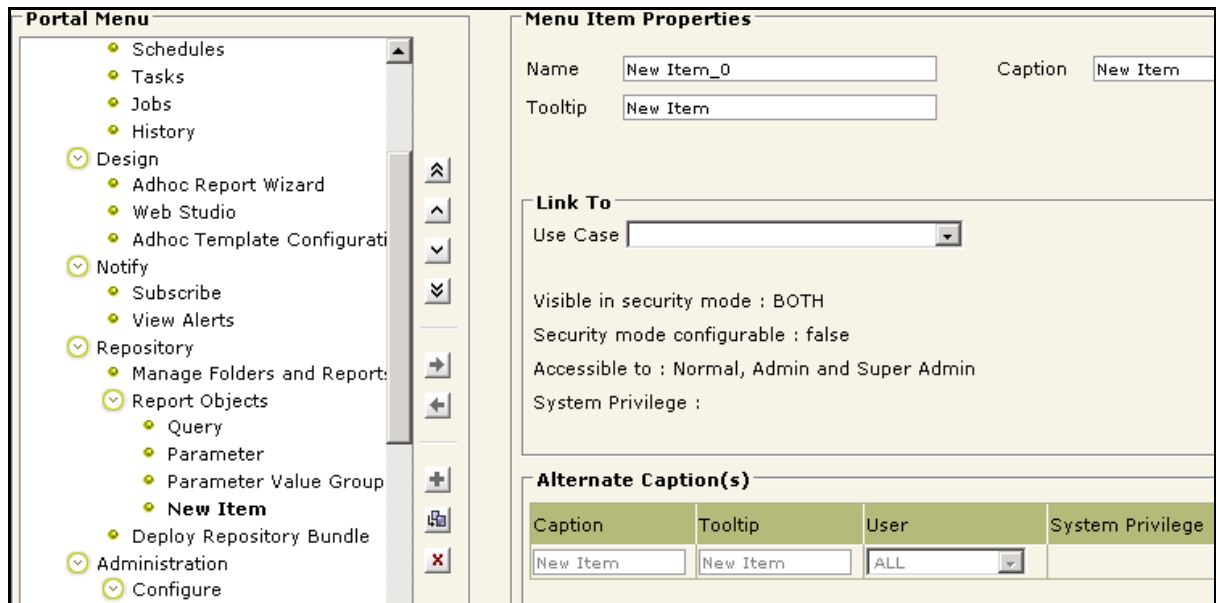




Figure 16: Adding a node under second level


1. In tree view, click the second level item under which you want to create an option.
2. Click  button. Page is cleared.
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) that should be executed.
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.

## Delete 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.

## Create 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.

## To restore default portal menu for open entity

1. Click **Restore Default** button.
2. Click **Save** button.

## 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



Before



After

Figure 17: Effect of Move to upper menu of current parent





Before



After

Figure 18: Effect of Move to lower menu of current parent



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

