



Customizing Portal Menu

Intellicus Enterprise Reporting and BI Platform



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

Contents

Customizing Intellicus	5
Using Portal Menu configuration page	5
Buttons on Configuration page.....	5
Open Configuration dialog.....	6
Save Configuration dialog	7
Delete Configuration dialog	7
Customizing Portal Menu	8
Portal properties	9
Managing Errors.....	12
Menu Item Properties.....	13
Link To	13
Options (Reports).....	16
Options (Performance Monitor)	16
Adding a top level menu item	17
Adding a second level menu item	18
Adding a third level menu item	19
Delete an item	19
Create an item like an existing item	20
Promoting an item	20
Demoting an item.....	20
To restore default portal menu for open entity	20
Changing location of an item	21

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:

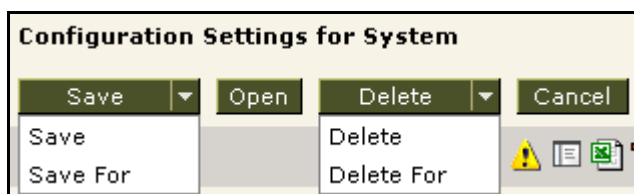


Figure 1: Buttons on Configuration pages

- **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...

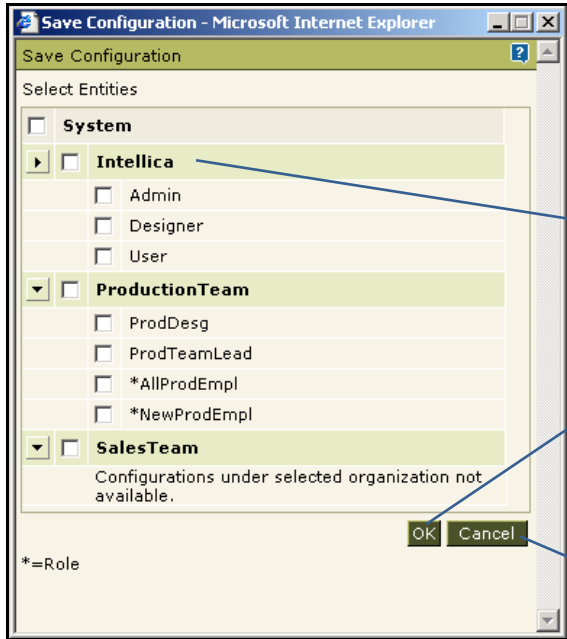
2. After selecting the entity, click **OK**.
The dialog box will close and configuration for the selected entity will appear in Configuration page.

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.



1. Select (check) the checkboxes of entities you wish to save configuration for...

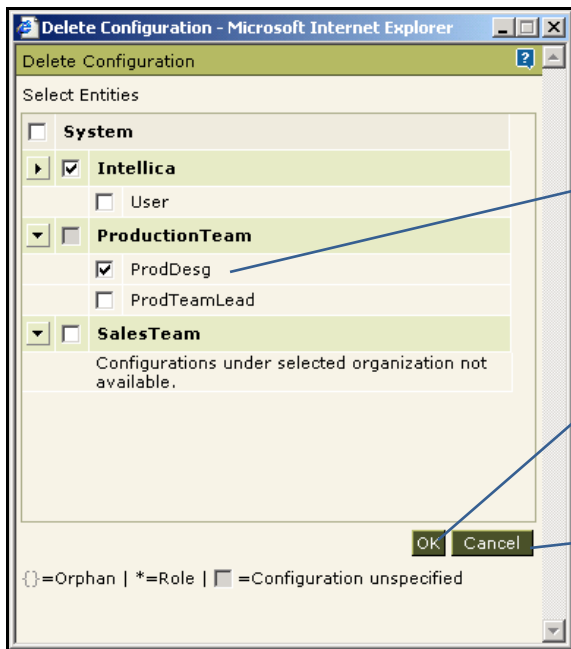
2. After selecting the entities, click **OK**.

The dialog box will close and configuration for the selected entities will be saved.

Click **Cancel** to return to Configuration page without saving the changes.

Figure 3: Save Configuration dialog

Delete Configuration dialog



1. Select (check) the checkboxes of entities you wish to Delete configuration of...

2. After selecting the entities, click **OK**.

The dialog box will close and configuration for the selected entities will be deleted.

Click **Cancel** to return to Configuration page without deleting any configuration.

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)

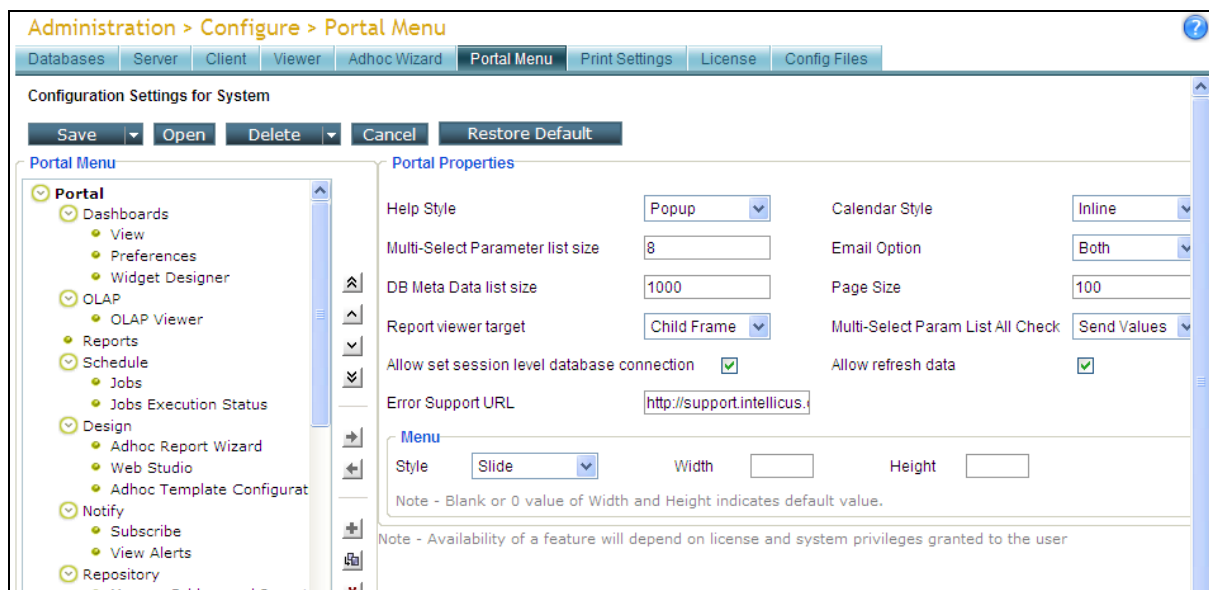


Figure 5: Portal Menu page

Portal menu customisation related activities are carried out on **Portal** tab. Click Navigation > 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.

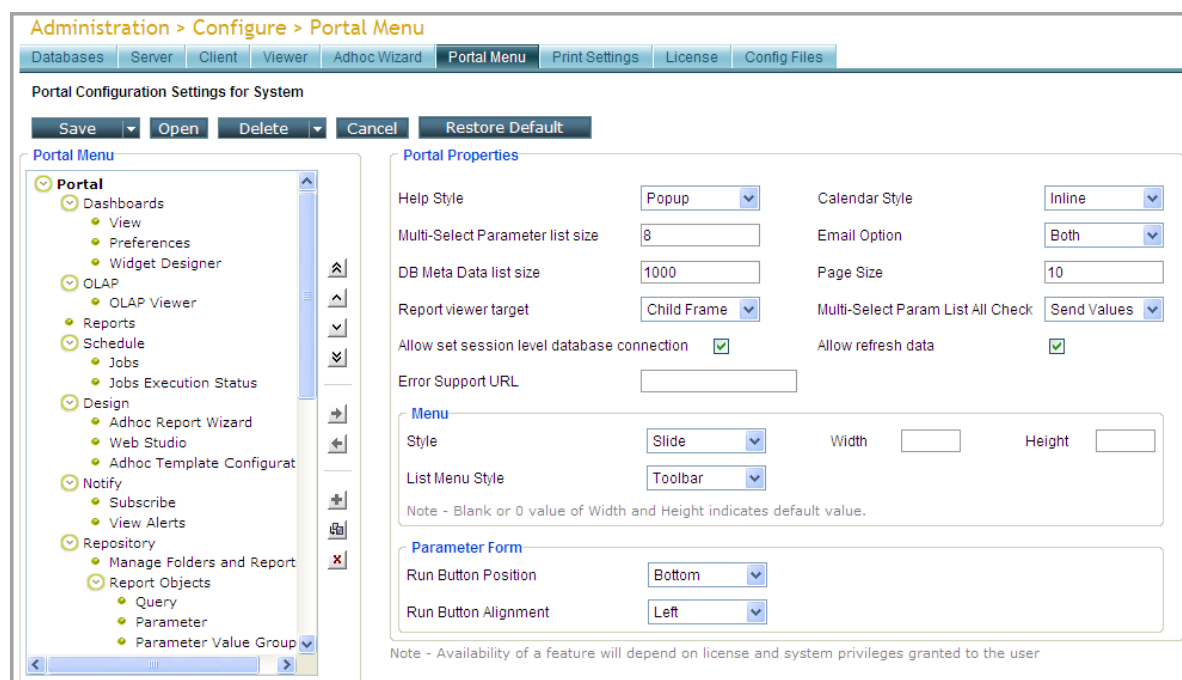


Figure 6: Portal Properties area on Portal Menu page

- **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.

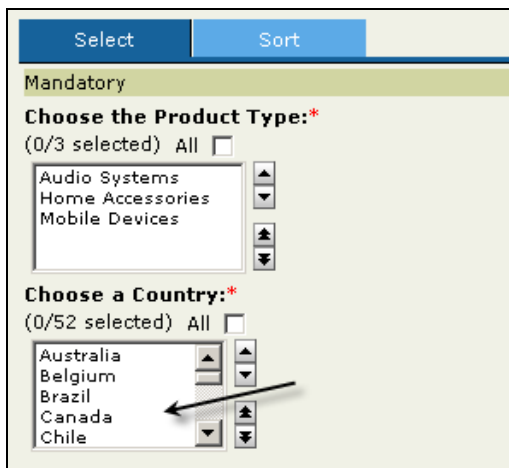


Figure 7: Multi-select parameters with 5 values visible at a time

- **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.

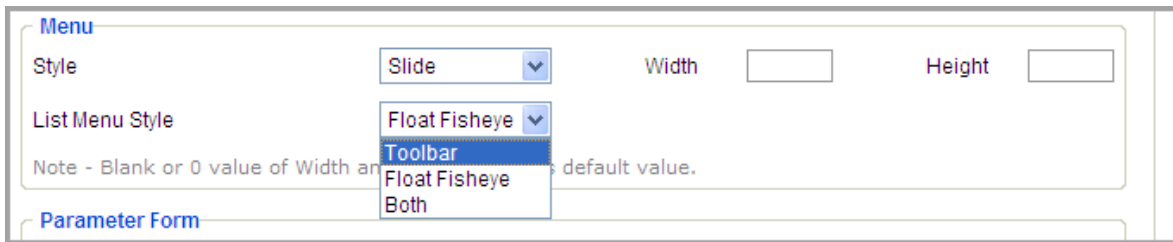


Figure 8: List Menu Style

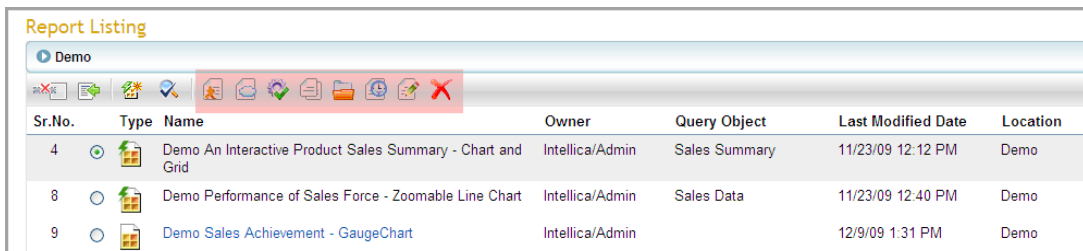


Figure 9: List Menu Style-Toolbar

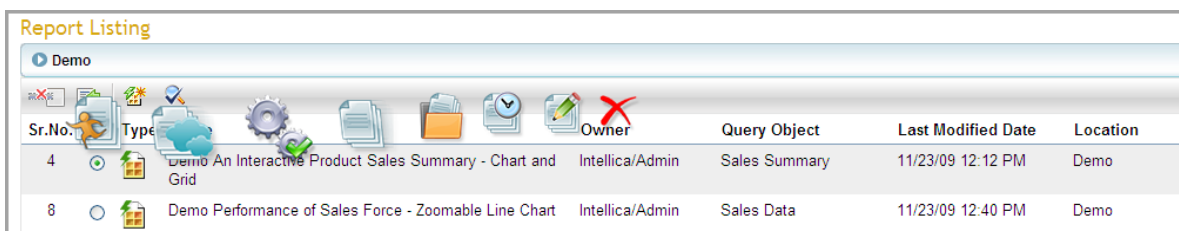


Figure 10: List Menu Style-Float Fisheye

Sr.No.	Type	Name	Owner	Query Object	Last Modified Date	Location
4		Demo An Interactive Product Sales Summary - Chart and Grid	Intellica/Admin	Sales Summary	11/23/09 12:12 PM	Demo
8		Demo Performance of Sales - Z...ble Chart	Intellica/Admin	Sales Data	11/23/09 12:40 PM	Demo
9		Demo Sales Achievement - GaugeChart	Intellica/Admin		12/9/09 1:31 PM	Demo

Figure 11: List Menu Style-Both

- **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 12: 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:** 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 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.

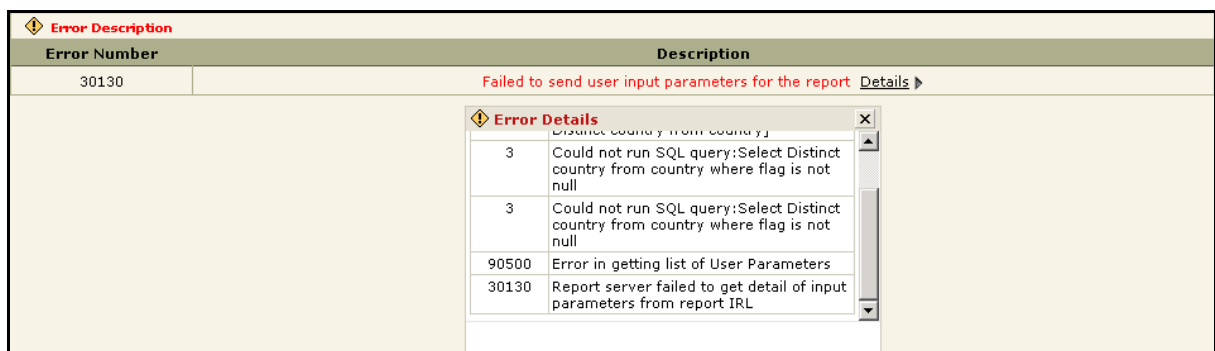


Figure 13: Error codes without hyperlink effect

Menu

- **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.
- **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.

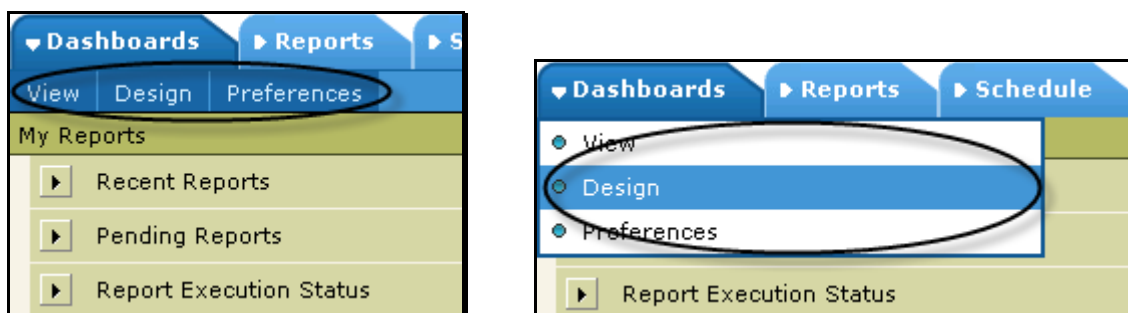
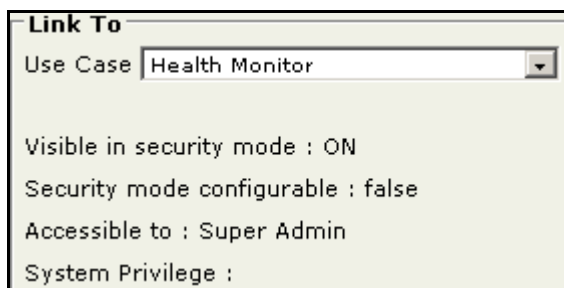


Figure 14: effect of Menu style - Tabbed and Drop down

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 15: 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.

Parameter Form

The screenshot shows a configuration window titled "Parameter Form". It contains two dropdown menus: "Run Button Position" set to "Bottom" and "Run Button Alignment" set to "Left". Below these is a note: "Note - Availability of a feature will depend on license and system privileges granted to the user".

Figure 16: 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.

The screenshot shows a form titled "Demo Weekly Employee Schedules". At the top, there is a "Run Now" button, a "Reset" button, a "(Select Form)" dropdown, and refresh/cancel icons. Below this is a "2 Week Starts On*" field with the date "08/31/2008" and a calendar icon. At the bottom, there is another "Run Now" button, a "Reset" button, a "Save Form As" checkbox, and an empty text input field.

Figure 17: Run Button Position-Both

The screenshot shows the same form as Figure 17, but the "Run Now" button at the bottom is not visible. The "Run Now" button at the top is visible, along with the "Reset" button, "(Select Form)" dropdown, and refresh/cancel icons. The "2 Week Starts On*" field shows "08/31/2008" and the "Save Form As" checkbox is present.

Figure 18: Run Button Position-Top

The screenshot shows the same form as Figure 17, but the "Run Now" button at the top is not visible. The "Run Now" button at the bottom is visible, along with the "Reset" button, "Save Form As" checkbox, and empty text input field. The "(Select Form)" dropdown, refresh/cancel icons, and "2 Week Starts On*" field are also visible.

Figure 19: 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.

The screenshot shows a window titled "Report Parameters" with a sub-header "Demo HCFA Form Report - Preprinted Forms". The form contains several input fields and buttons. At the top, there is a "Run Now" button with a dropdown arrow, followed by a "Reset" button, a "(Select Form)" dropdown menu, and two small icons (refresh and close). Below this is a "Select Patient*" dropdown menu with "Amitola clarke" selected. At the bottom, there is another "Run Now" button with a dropdown arrow, a "Reset" button, a "Save Form As" checkbox, and an empty text input field.

Figure 20: Run Button Alignment-Left

The screenshot shows the same "Report Parameters" window. In this version, the "Run Now" button with a dropdown arrow and the "Reset" button are positioned to the right of the "(Select Form)" dropdown menu and the two small icons. The "Select Patient*" dropdown menu and the "Select Print Option*" dropdown menu (with "Plain" selected) are positioned to the left of the "Run Now" and "Reset" buttons. The "Save Form As" checkbox and text input field remain at the bottom right.

Figure 21: Run Button Alignment-Right

The screenshot shows the same "Report Parameters" window. In this version, the "Run Now" button with a dropdown arrow and the "Reset" button are centered horizontally between the "Select Patient*" dropdown menu and the "Select Print Option*" dropdown menu. The "Save Form As" checkbox and text input field are still at the bottom right.

Figure 22: Run Button Alignment-Center

Options (Reports)

Option(s)	
Show report type	All <input type="button" value="v"/>
Show new Adhoc option	True <input type="button" value="v"/>
Show Rerun option	False <input type="button" value="v"/>
Show Delete option	False <input type="button" value="v"/>

Figure 23: Options for reports page

- **Show Report Type:** Select the type of reports that should appear on report list: Select *All*, to list Adhoc reports, Standard reports as OLAP reports, select a report type to view only that type of 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	<input type="text" value="30"/> (Secs)

Figure 24: 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

Administration > Configure > Portal Menu

Databases Server Client Viewer Adhoc Wizard Portal Menu Print Settings License Config Files

Portal Configuration Settings for System

Save Open Delete Cancel Restore Default

Portal Menu

- Portal
 - Dashboards
 - View
 - Preferences
 - Widget Designer
 - OLAP
 - OLAP Viewer
 - Reports
 - Schedule
 - Jobs
 - Jobs Execution Status
 - Design
 - Adhoc Report Wizard
 - Web Studio
 - Adhoc Template Configurat
 - Notify
 - Subscribe
 - View Alerts
 - Repository
 - Manage Folders and Report
 - Report Objects
 - Query
 - Parameter
 - Parameter Value Group

Portal Properties

Help Style: Popup Calendar Style: Inline

Multi-Select Parameter list size: 8 Email Option: Both

DB Meta Data list size: 1000 Page Size: 10

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: Toolbar

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

Parameter Form

Run Button Position: Bottom

Run Button Alignment: Left

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

Figure 25: 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

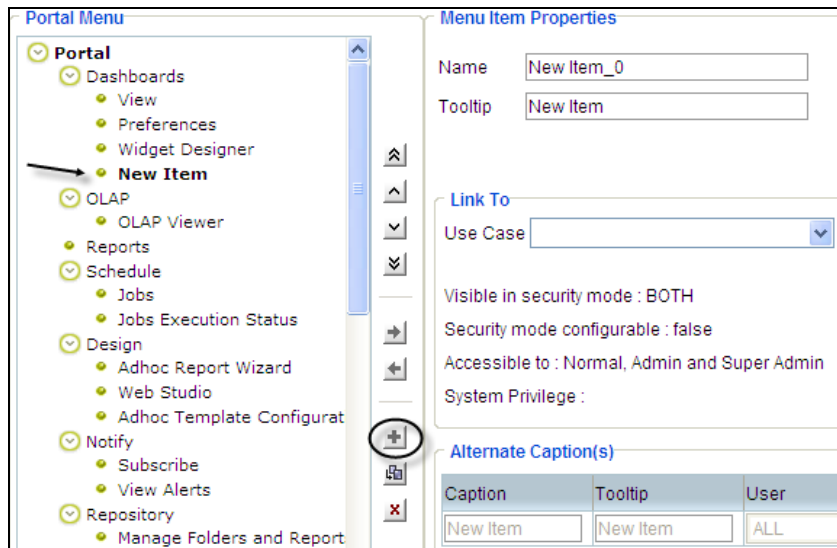



Figure 26: Adding a node under first level menu item

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

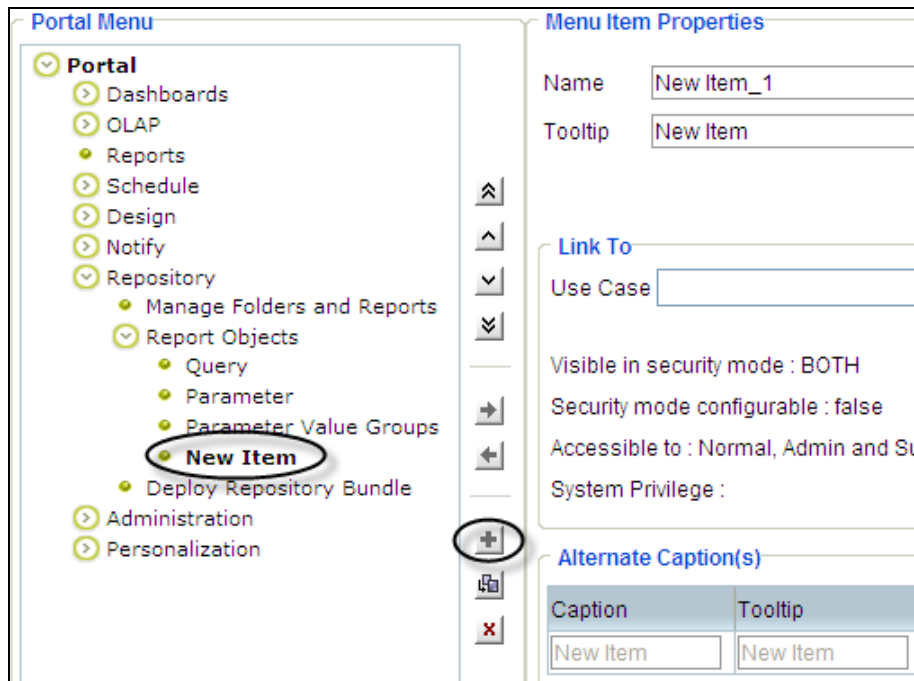


Figure 27: Adding a node under second level


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 **x** 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 28: Effect of Move to upper menu of current parent



Before



After

Figure 29: 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.

