

Introduction (Custom Menus)

This document describes the steps to configure custom menus in Versago.

Related Documents

The following documents contain additional information that may be helpful with understanding these processes.

- [Roles, Profiles, and Users Setup](#)

Special Terminology

- Versago **content**: is a general shorthand term for Versago reports, dashboards, and forms.

To Begin

- Click on the [Admin](#) link in the profile section of the Versago home page to access the Administration console.
- Menus configuration is found under the Dynamic Content category of the menu.

Overview

Custom Menus allow a Versago administrator to create menu structures that more closely follow the needs of specific groups of Versago users (i.e. Roles). A custom menu provides the ability to display reports, dashboards, and forms in any sequence, and to have custom groupings of functions. A custom menu takes the place of the default Versago menu structure for the associated role. Conversely, if a custom menu is not associated with a role the default menu structure is used.

Each custom menu is associated with one role. Any content that needs to appear in a custom menu must first be associated with the role. This process is described in the “Versago – Roles, Profiles, and Users Setup” document.

It is important to remember that if custom menus are in use, Versago content must be assigned to a custom menu for it to be displayed. If content is associated with the role but is not added to the custom menu, it will not be displayed for the users in that role.

Menu Maintenance

- Click on the Menus link in the Admin console to begin.

Add New Menu			
Drag a column header and drop it here to group by that column			
Menu Name	Comments		Delete
Demo Menu	This is a demonstration menu		Delete

The custom menu maintenance tool provides two functions: creation of new menus and maintenance of existing menus.

- A listing of existing menus is displayed when the function is opened.
- Click the **[Add New Menu]** button to create a new menu.
- Click the link for the menu in the Menu Name column to edit an existing menu.
- Click the **[Delete]** button to remove a menu.
 - If a menu is deleted, all users in that role will revert to the default menu structure.

Menu Configuration

- Enter a name for the menu.
 - Value is required and can be changed at any time.
 - This name is displayed in the menu configuration listing and is for information only.
- Enter any comments for the menu
 - Value is required and can be changed at any time.
- Select the Versago **role** associated with this menu.
 - Value is required and can be changed at any time.

2. A role can be associated with only one menu.

At least one content item must be placed into the menu (as described below) before a new menu can be saved.

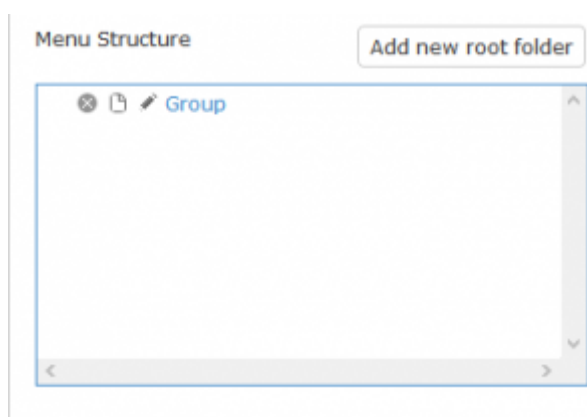
Quick Actions Section

Content placed in the **Quick Actions** section of the menu are displayed at the top of the menu as it is displayed to the user. The idea of Quick Actions is that they are functions the user group uses very frequently. There is no technical limit to the number of Quick Actions but from a practical standpoint they should be limited to no more than four or five.

Placing content in the Quick Actions section is described later in this document.

Menu Structure Section

The **Menu Structure** is used to define the menu displayed to the user, exclusive of the Quick Actions section. The menu can consist of top-level content (not in a folder), content grouped into folders, and content grouped into sub-folders of main folders. Only two levels of sub-folders (sub-folder within a sub-folder) are supported.



1. The menu structure is created with one folder when a new menu is created as shown above.
2. Click the **[Add new root folder]** button at any time to create a new “main level” folder.
 1. The new folder is added at the bottom of the structure but can be moved as needed.

Editing Icons

Three icons are used to indicate editing tools that are available for folders and content. Click on the folder or content to use these tools.

 Click to add a sub-folder. Only available for folder content.

 Click to delete the selected content.



Click to change the caption of the content. Only available for folder, sub-folder, and Quick Action content. Captions are limited to 20 characters in length.

Adding Content to the Menu

Versago content (reports, forms, dashboards) is added to the Quick Actions or Menu Structure sections using “drag-and-drop.”

1. Select the desired content set from the drop-down list on the right side of the page.
 1. A list of the selected content already associated with the role of the menu is displayed.
2. Select the desired content from the list and hold down the left-mouse button.
3. “Drag” the selected content to the desired position in the menu.

Quick Actions

1. “Drop” the content into the Quick Actions section. It will be placed at the bottom of the existing list of content.

Menu Structure

1. “Drop” the selected content into the Menu Structure section by releasing the left mouse button.
 1. To place the content in a folder, drop it on top of the folder name. The folder name will be faintly highlighted indicating that it has been selected.
 2. Content not dropped into a folder is placed at the bottom of the list at the root (base) level of the menu.

Moving Content in the Menu

Content in a menu is moved using “drag-and-drop.”

1. Select the desired content in either the Quick Actions or Menu Structure section and hold down the left mouse button.
2. “Drag” the content to the desired position.
 1. Content can be moved between sections if desired.
3. “Drop” the content by releasing the left mouse button.
 1. An indicator line will show where the content will be placed.
 2. Content placed on another content will be placed below the existing content.

Menu Appearance

The following images illustrate how a menu configuration displays to users in the associated role.

Menu Configuration

Quick Actions

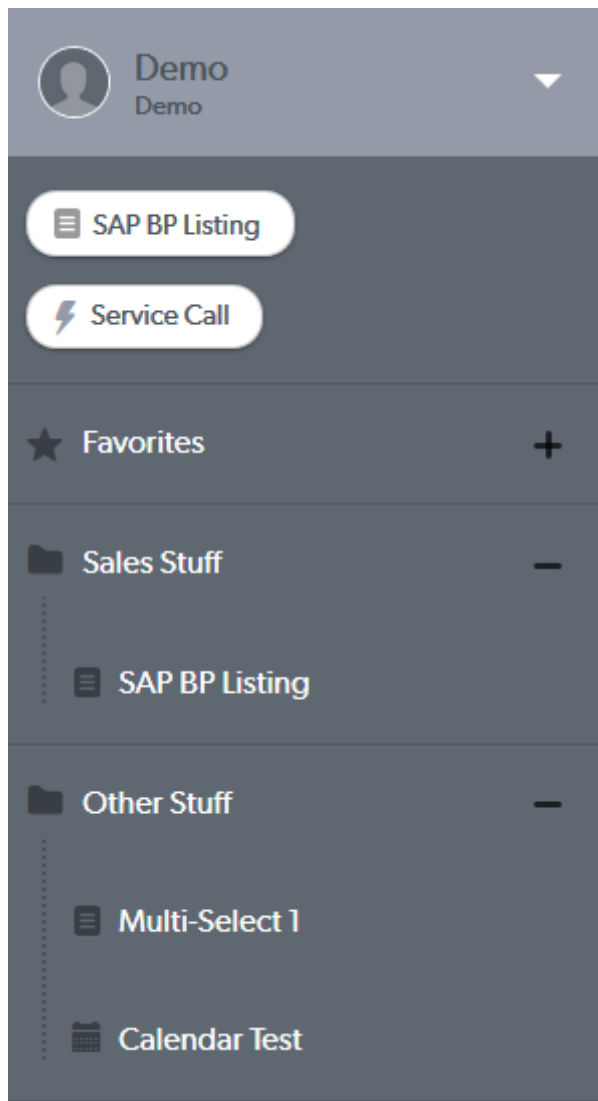
SAP BP Listing ✕ ✎
Service Call ✕ ✎

Menu Structure

Add new root folder

▲ ✕ ✎ Sales Stuff
 ✕ SAP BP Listing
▲ ✕ ✎ Other Stuff
 ✕ Multi-Select 1
 ✕ Calendar Test

Menu Displayed to User



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Last update: **2019/11/13 11:36**

