

Admin Menu Feature in Detail

Admin Menus provide permitted users with menus to access administrative features of your website. This feature was added in version 4.40 to replace the static Main Administration Menu. It allows customized menus to be created for specific users groups. Members of the “Admin” Security Group are automatically assigned a default Administration menu. For all other Security Groups, Admin Menus must be assigned using Security Group Management. The old style Main Administration Menu is still available by clicking the Main Menu option located in the header of all Administrative pages.

Admin Menu feature benefits include:

- Customizable menus for accessing administrative menus.
- Create different Admin Menus for each Security Group.
- Secure access to each Admin Menu based on Security Group assignment.
- Automatic assignment of Admin Menus to all members of a Security Group.
- Create an unlimited number of Admin Menus.
- Users can access multiple Admin Menus.
- Create specialized Admin Menus based on staff roles, task type, etc.
- Familiar Menu Builder tool is used to create and manage Admin Menus.
- Hotkeys to navigate and select Admin Menu Items using keyboard.
- Visible and readily accessible on almost all Administrative pages making it easy to jump to any administrative option from just about anywhere.

1.1 The Visitor Experience

This feature is typically limited to staff (administrative users) and visitors will never use it.

Admin Menus are displayed in the left side bar of almost all administrative pages. Ctrl-Alt-M allows permitted users to access the administrative management portion of the system. Prior to version 4.40 Ctrl-Alt-M took the user to the static Main Administration Menu. Starting with version 4.40, it takes the user to their Dashboard and displays their last used Admin Menu in the left side bar. Each user can be assigned more than one Admin Menu. The user may select to view a different Admin Menu using a simple drop down list box located at the top of the Admin Menu. The list box will list all Admin Menus that the user is permitted to view. As the user navigates the administrative pages of the website, the last menu selected will always be displayed.

1.2 Components

1.2.1 Admin Menu:

Admin Menus are comprised of the following elements:

- Menu Selection List Box – displays the name of the currently selected Admin Menu as shown below. The list box lists all Admin Menus that the user has been granted permissions to use.



- Menu Topics – Topics can either be a hyperlink or heading for Menu Items. When the Topic is a heading, click on it to expand and contract the Menu Items. If highlighted using the

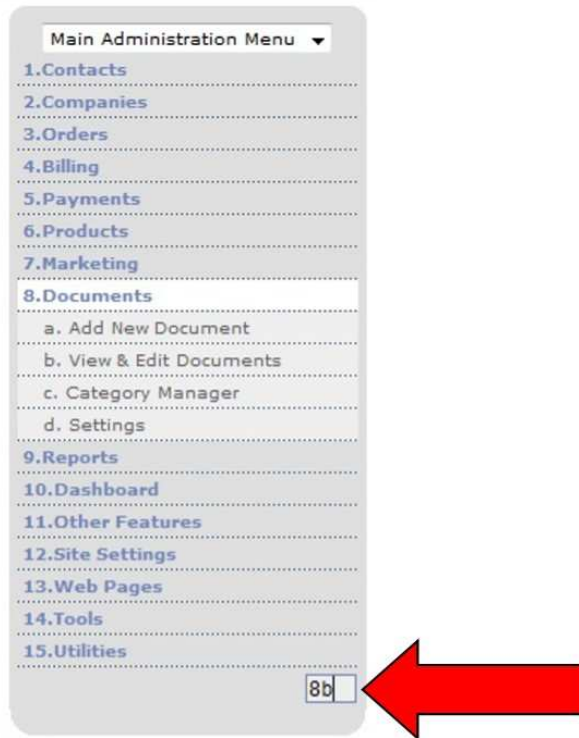
cursor keys, press the enter key to expand and contract. Topics are enumerated so they can be selected using the keyboard. See the Jump To feature below for an explanation of how this works.



- Menu Items – menu items are hyperlinks. Items are enumerated with letters so they can be selected using the keyboard. See the Jump To feature below for an explanation of how this works.



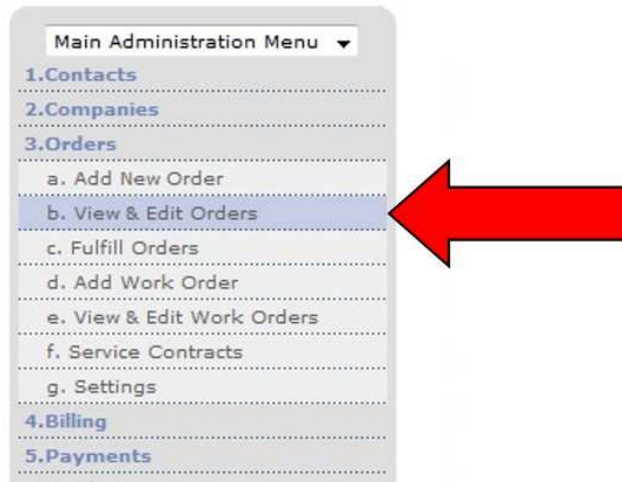
- Jump To feature – provides a short cut for selecting a menu item using the keyboard. Press Ctrl-Alt key combination to give the Jump To text box the focus, then enter either a Topic number or Topic number plus Item letter and press enter key to jump to it. The Jump To text box is shown in the picture below.



- Highlight Bar – when the Admin Menu has focus, the up and down arrow keys may be used to move the highlight bar. The highlight bar has a white background. The first time you press the enter key on a highlighted Topic it will expand the Topic to display the Topic's menu items; the next time you press enter key it will hide the Topic's menu items. If the Topic is a hyperlink and does not contain Menu Items, the enter key will select the Topic, taking you to the hyperlinked page. The picture below shows the highlight bar positioned on the Topic "3. Orders" in expanded mode.



- Selection Bar – the Selection Bar indicates the last Item selected. It has a blue background. The picture below shows the Menu Item "3b. View & Edit Orders" as selected.



The following components are used to create and manage Admin Menus.

1.2.2 Menu Builder page:

The Menu Builder page is used to create and manage the Admin Menus. See the Menu Builder chapter of this guide for details about how to use Menu Builder.

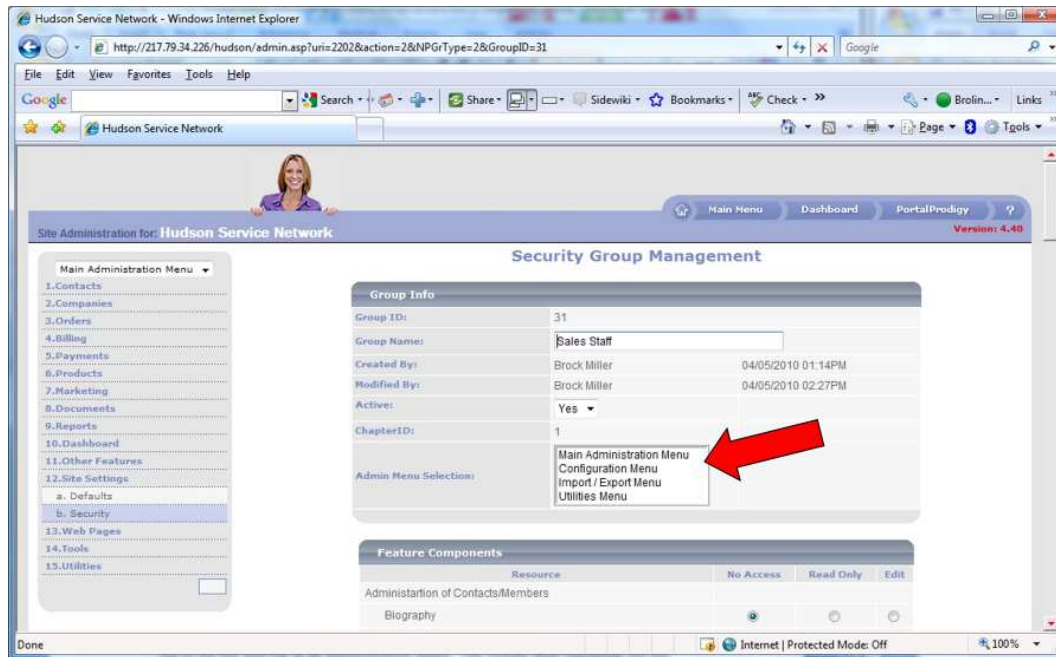


Users of PortalProdigy prior to version 4.40, note that the old style Main Administration Menu can be accessed from any Administrative page by clicking the “Main Menu” option located in the header.

1.2.3 Security Group Management page:

The Security Group Management page is used to assign Admin Menus to a Security Group. For a complete explanation see the Security Group chapter of this guide.

- Admin Menu Selection – scrollable list of available Admin Menus. Allows the selection of one more menus. Use the Ctrl key to select multiple menus.



See the Security Groups chapter of this guide for additional details.

1.3 Feature Administration

See the chapter of this guide titled Menu Builder for a detailed explanation how to create and manage menus.

See the chapter of this guide titled Security Groups for a detailed explanation how to create Security Groups and assign Admin Menus to users.

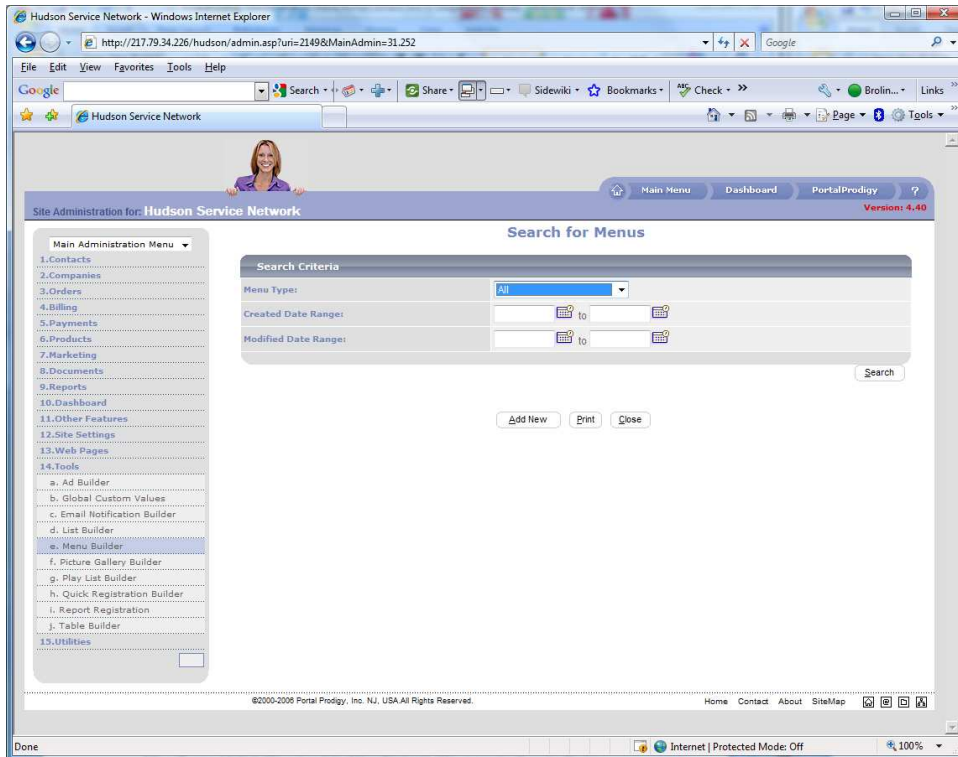
1.4 Tutorials

The following are tutorials for the task of configuring, managing, and assigning Admin Menus.

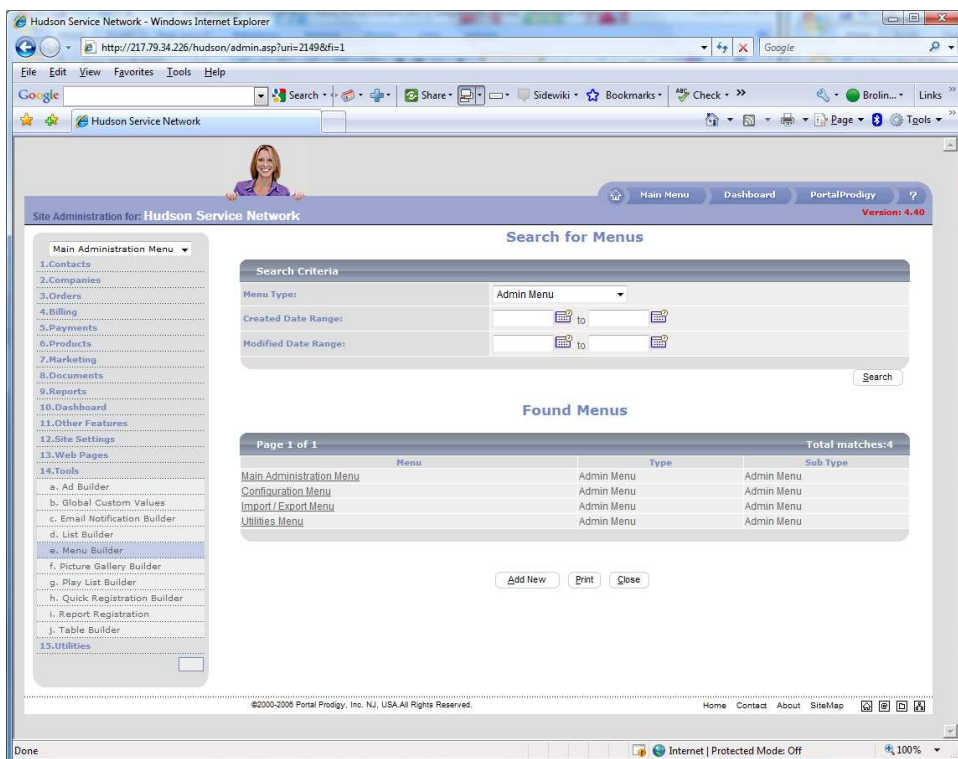
1.4.1 How to Edit an Admin Menu:

- From the “Main Administration Menu” select “Tools > Menu Builder” to display the Search for Menus page shown below.

Items/Products Catalog Feature in Detail



- Set Menu Type list box to “Admin Menu” and click the “Search” button located below the lower right corner of the Search Criteria section. This will display the default Admin Menus that are included with every system.



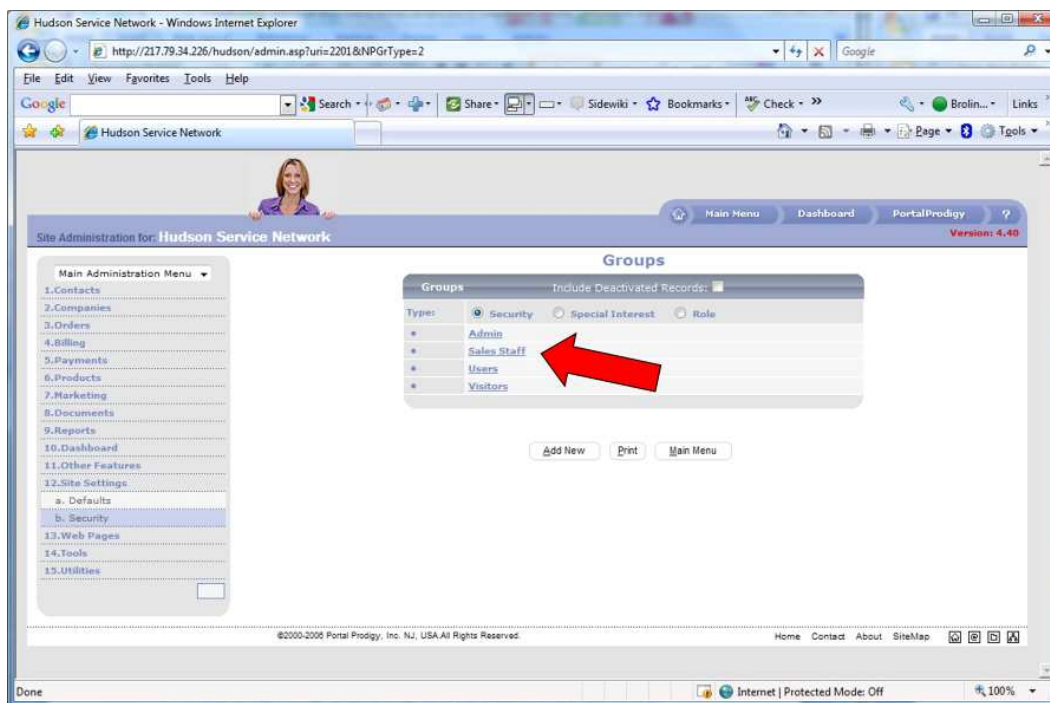
- To edit the primary administrative menu click “Main Administration Menu” listed in the Found Menus section.
- You can edit the Admin Menu like any other menu. For additional instructions see the Menu Builder Chapter of this guide.

1.4.2 How to Create a New Admin Menu:

- From the “Main Administration Menu” select “Tools > Menu Builder” to display the Search for Menus page.
- Click the “Add New” button located at the bottom of the page.
- You add the Admin Menu like any other menu. Be sure to set Type to “Admin Menu”. For additional instructions see the Menu Builder Chapter of this guide.

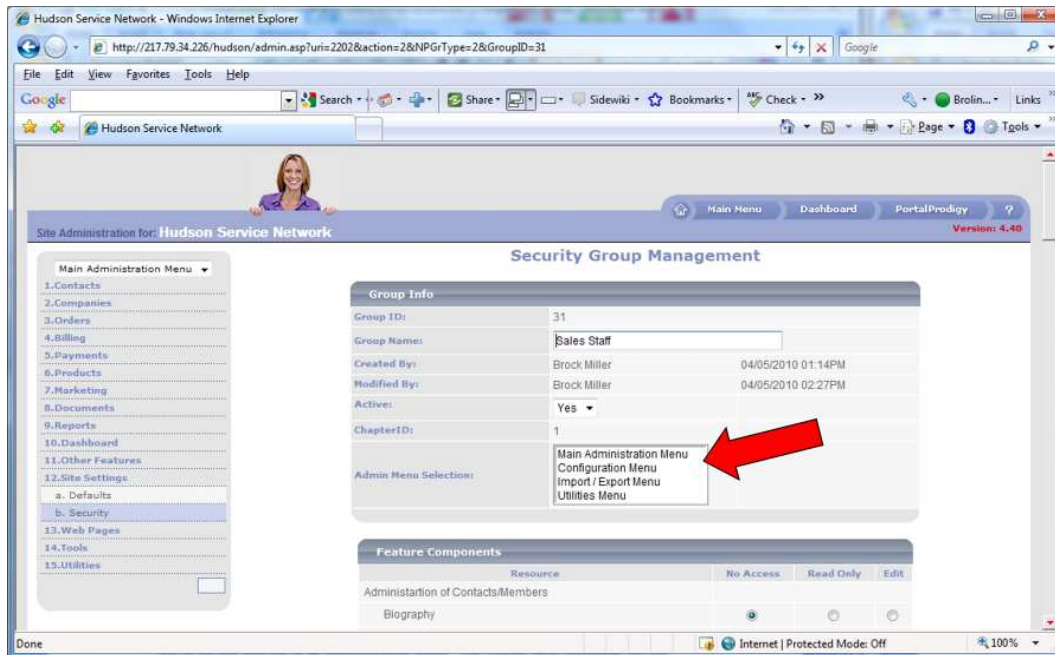
1.4.3 How to Assign an Admin Menu to a Security Group:

- From the Main Administration Menu select “Site Settings > Security” to display the Groups page shown below.



- Click on the Security Group that you want to assign an Admin Menu to.
- Click on a menu name in the Admin Menu Selection list. To select more than one menu, hold down the Ctrl key when clicking on the menu name.

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- You must assign access rights to the resources (features) that are listed in the Admin Menu. Placing a menu item on an Admin Menu does not grant access rights. Access rights are granted by selecting the resources that correspond with the features placed on the menu. See the Security Groups chapter of this guide for additional instructions about resources and assignment of access rights.
- Be sure to grant Edit rights to the resource “Administration of Site Main Menu” as shown in the picture below. Without this, the user will not be able to view their Admin Menu.

Sales Mngt Tasks	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales Mngt WorkOrders	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Administration of Site Main Menu	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

- Save the changes by clicking the Save button.
- Click the Close button to exit Security Group Management.

3.1 Special Situations

Part of the PortalProdigy success is you. As a member of the PortalProdigy community we welcome your contributions to the ongoing improvement and usage of the product. If you discover a solution to a special situation please email it to us at support@portalprodigy.com

3.2 Troubleshooting

By default only members of the “Admin” Security Group are able to access the administration and Admin Menus. If you want members of other Security Groups to be able to access the administration and Admin Menus you must assign one or more Admin Menus to the Security Group. If a users that has not been assigned to an Admin Menu attempts to access Administration they will receive a message to contact an administrator for assistance.

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