

Customize Menu Items

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Overview

In the customization template project, there are two configuration files that you can edit to customize the main menu items and subitems.

- **Default.config**: Configure the main portal menu items.
- **HotOperations.config**: Configure menu items related to the case management pages (known as Hot Operations up to version 9.x).

Location: src\addons\transform\Shared Resources\Components\Flowtime\Config\Portal\Commands

In these files, you can edit existing links, set up their URLs, and add links to new pages.

Add a new menu item

In this example, you add a menu item that links to a custom **MyForm.aspx** page.

To open the new menu item in a new tab:

```
<?xml version="1.0"?>
<CommandDocument xmlns:xdt="http://schemas.microsoft.com/XML-Document-Transform" xmlns="http://schemas.pnmsoft.com/sequence/2013/01/ui/commands">
  <CommandTable xdt:Transform="InsertIfMissing">
    <NavigateToUrlCommand xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="MyFormCommand"
    Url="~/MyForms/MyForm.aspx"/>
  </CommandTable>
  <ControlTable xdt:Transform="InsertIfMissing">
    <Menu xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="Portal">
      <Items>
        <MenuItem xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="MyFormMenuItem" Command="MyFormCommand"
        Text="My Form" Tab="true"/>
      </Items>
    </Menu>
  </ControlTable>
</CommandDocument>
```

To open the new menu item in the main view:

```
<?xml version="1.0"?>
<CommandDocument xmlns:xdt="http://schemas.microsoft.com/XML-Document-Transform" xmlns="http://schemas.pnmsoft.com/sequence/2013/01/ui/commands">
  <CommandTable xdt:Transform="InsertIfMissing">
    <NavigateToUrlCommand xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="MyFormCommand"
    Url="/MyForms/MyForm.aspx"/>
  </CommandTable>
  <ControlTable xdt:Transform="InsertIfMissing">
    <Menu xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="Portal">
      <Items>
        <MenuItem xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="MyFormMenuItem" Command="MyFormCommand"
        Text="My Form"/>
      </Items>
    </Menu>
  </ControlTable>
</CommandDocument>
```

Set an image for the menu item

Each menu item includes an image. You define the image attribute in the `MenuItem` section.

For example: `Image="Flowtime/Images/Menu/Processes.png"`

Reorder menu item

You can change the order of the menu items, by adding the `Sequence` attribute.

For example: `Sequence="1"`

Add a submenu

The Flowtime site menu can include up to two menu levels.

In this example, you add one submenu item to the Processes menu item.

1. Open the `Default.config` file.
2. In a new or existing `MenuItem` section, add the property `SubMenuId="Processes"`.
This setting links the submenu to the correct menu item.
3. To define the submenu, add a new `MenuItem` tag that includes the new submenu item.

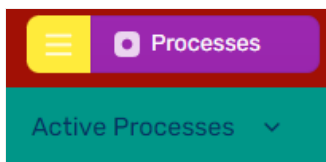
For example:

```
<Menu xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="Processes">
  <Items>
    <MenuItem xdt:Transform="InsertIfMissing" xdt:Locator="Match(Id)" Id="ActiveProcessesMenuItem" Command="ActiveProcesses" Text="Active Processes" Tab="true"/>
  </Items>
</Menu>
```

NOTE

Make sure that the command that you specify exists under the `commandTable` tag.

Following the configuration described in the example above, the resulting submenu should look like this:



Menu item configuration for case management pages

Case management menu items display based on the user roles.

The `DisplayRules` code block defines which commands to display based on a set of rules.

You set the case management (previously called Hot Operations) display rules in the `HotOperations.config` file, under `<MenuItem><DisplayRules>`.

Setting	Description
<code><ho:IsOpsManagerRule /></code>	Displays the relevant menu item for the Manager role.
<code><ho:IsTeamLeaderRule /></code>	Displays the relevant menu item for the Team Leader role.

The context of the rule may come from different sources, for example:

- Runtime expression
- SolutionId or GroupId
- Resources (localization)
- AppSettings from web.config

Example

```
<MenuItem
  Id="CaseManagement"
  Text="Case Management"
  Tooltip="Case Management"
  Image="sqpi-CaseManagement"
  SubMenuId="HotOperationsManager">
  <DisplayRules>
    <ho:IsOpsManagerRule />
  </DisplayRules>
</MenuItem>
```

Localize custom portal components

1. Add the following attribute to the portal web.config file:

```
<resources resXFilesLocation="Resources" externalGlobalResourceName="CustomResourceFileName" />
```

2. Under **Shared Resources/Resources/Sequence**, add the localized files.
For example: **CustomResourceFileName.resx** or **CustomResourceFileName.es.resx**
3. Use the following expression to get the resource value:

```
{ $resources.KeyName }
```

Example

```
<MenuItem Id="CoraOpsProcessesIStarted"
  Command="CoraOpsProcessesIStartedCommand"
  Text="{ $resources.CasesIStarted}"
  Tooltip="{ $resources.CasesIStarted}"
  Image="sqpi-Processes">
</MenuItem>
```