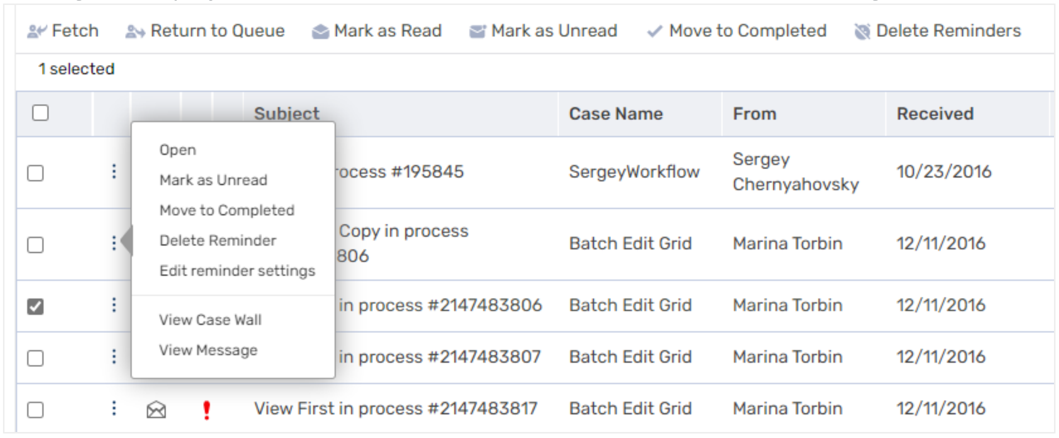
Customize the Grid Menu

Last Modified on 11/11/2022 7:46 am EST

Overview

Portal grids display a menu with the actions available for the user handling a case.



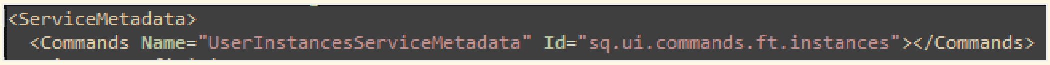
	Subject	Case Name	From	Received
☐	rocess #195845	SergeyWorkflow	Sergey Chernyahovsky	10/23/2016
☐	Copy in process 806	Batch Edit Grid	Marina Torbin	12/11/2016
☑	in process #2147483806	Batch Edit Grid	Marina Torbin	12/11/2016
☐	in process #2147483807	Batch Edit Grid	Marina Torbin	12/11/2016
☐	View First in process #2147483817	Batch Edit Grid	Marina Torbin	12/11/2016

You define the commands available for each grid by:

- Editing the Commands Name block in the ServiceMetadata file
- Editing or creating copies of the config files in the Commands folder. You can add, remove, and create new commands as necessary for your solution.

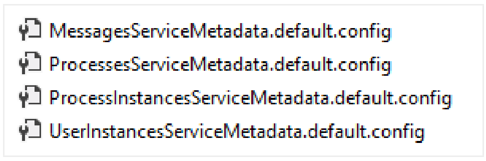
After editing the files, you must add them to the **Commands** folder, otherwise your changes don't take effect.

IMPORTANT
The file name must begin as defined in the Commands Name block in the ServiceMetadata file.



```
<ServiceMetadata>
  <Commands Name="UserInstancesServiceMetadata" Id="sq.ui.commands.ft.instances"></Commands>
```

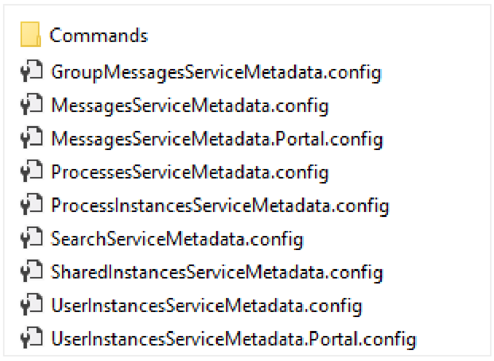
Commands folder



MessagesServiceMetadata.default.config
ProcessesServiceMetadata.default.config
ProcessInstancesServiceMetadata.default.config
UserInstancesServiceMetadata.default.config

Location: **~\Shared Resources\Components\Flowtime\Config\ServiceMetadata\Commands**

ServiceMetadata files


Commands
GroupMessagesServiceMetadata.config
MessagesServiceMetadata.config
MessagesServiceMetadata.Portal.config
ProcessesServiceMetadata.config
ProcessInstancesServiceMetadata.config
SearchServiceMetadata.config
SharedInstancesServiceMetadata.config
UserInstancesServiceMetadata.config
UserInstancesServiceMetadata.Portal.config

Location: **~\Shared Resources\Components\Flowtime\Config\ServiceMetadata**

NOTE
ProcessInstances: Used for the instances grid of a specific workflow (In the portal, go to All Cases and then select a specific workflow.)
UserInstances: Used for the *Cases / Started* grid

Example of the message grid command config file

```
<ToolBarItem
    Id="FetchMessages"
    Command="FetchMessages"
    CssClass="k-grid-toolbar-item"
    Text="{$resources.Fetch}"
    Image="Flowtime/Images/MessagesGrid/menu-fetch.svg">
</ToolBarItem>
```

```
<ContextMenuItem
   Id="FetchMessage"
   Command="FetchMessage"
   CssClass="k-grid-menu-item"
   Text="{$resources.Fetch}"
   Image="Flowtime/Images/MessagesGrid/menu-fetch.svg">
  <DisplayRules>
    <AndRule>
      <Rule Value="{ToInt32($item.QueueType) == 1}" />
      <Rule Value="{ToDateTime($item.CompletionDate) &lt; new DateTime(1901,1,1)  }" />
    </AndRule>
  </DisplayRules>
</ContextMenuItem>
```

Config files code blocks

The **Commands** config files include several code blocks.

You can create, edit, or remove code blocks to customize which commands to display in the grid menu.

Block	Description
ContextMenu Id	Defines the commands that are displayed for each record in the grid. This block references several ContextMenuItem blocks.

Block	Description
ContextMenuItem	Defines the details and functionality of each menu command.
ToolBar Id	Defines the commands that are displayed from each grid's toolbar. This block references several ToolBarItems blocks.
ToolBarItem	Defines the details and functionality of each toolbar command. Each **Command/ToolbarItem** block contains the following fields: **Id**: The Id of the commands **Command**: The command function **CssClass**: The CSS class that defines the display of the command
Text	The command text. Take this text from the relevant resource file.
DisplayRules	Defines which commands to display based on a set of rules.

The commands functions are stored in a **Command Table** block, which is also part of the config file. The Command Table can include several types of commands.

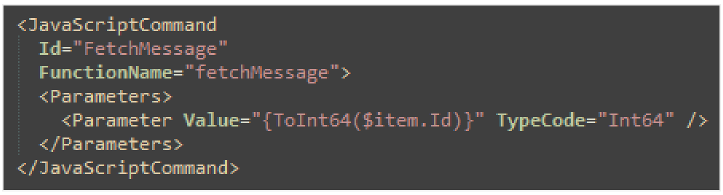
- JavaScript
- OpenWindow
- Custom command

NOTE
To ensure that your JavaScript code is not lost with application upgrades, place it in the folder:
~\Shared Resources\externals\portal\js

JavaScript commands

JavaScript commands contain the following tags:

- **Id**: The Id of the command
- **FunctionName**: The name of the JavaScript function in the system
- **Parameters**: The parameters to pass to the function, which can be an expression.
  For example, for the **Menu>Open** command, you must pass the Id of the item you have selected, so that the value of the parameter is the expression: $Item.Id.



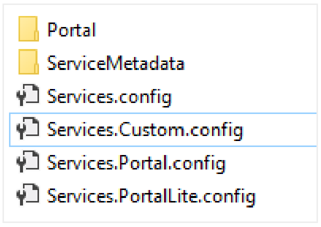
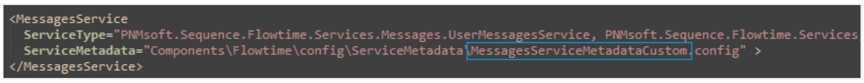
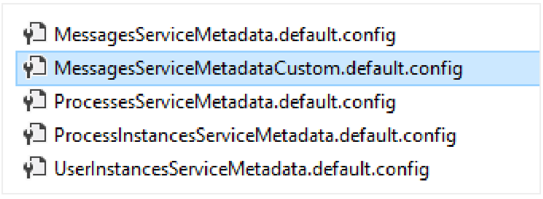
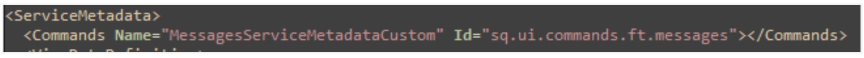
```
<JavaScriptCommand
  Id="FetchMessage"
  FunctionName="fetchMessage">
  <Parameters>
    <Parameter Value="{ToInt64($item.Id)}" TypeCode="Int64" />
  </Parameters>
</JavaScriptCommand>
```

Create a new command (example)

Create a new custom Service.config file, ServiceMetadata file, and Comand.config file named as follows:

- Services.Custom.config
- MessagesServiceMetadataCustom.config
- MessagesServiceMetadataCustom.default.config

Procedure

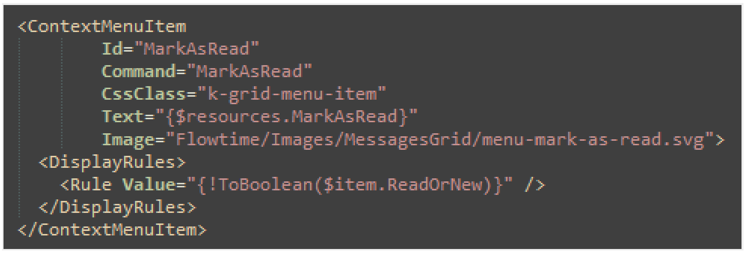
1. In Services.Custom.config file reference the custom ServiceMetadata file: MessagesServiceMetadataCustom.config.

Portal
ServiceMetadata
Services.config
Services.Custom.config
Services.Portal.config
Services.PortalLite.config

```
<MessagesService
  ServiceType="PNMsoft.Sequence.Flowtime.Services.Messages.UserMessagesService, PNMsoft.Sequence.Flowtime.Services
  ServiceMetadata="Components\Flowtime\config\ServiceMetadata\MessagesServiceMetadataCustom.config" >
</MessagesService>
```
2. In MessagesServiceMetadataCustom.config, reference the custom command config file: MessagesServiceMetadataCustom.default.config.

MessagesServiceMetadata.default.config
MessagesServiceMetadataCustom.default.config
ProcessesServiceMetadata.default.config
ProcessInstancesServiceMetadata.default.config
UserInstancesServiceMetadata.default.config

```
<ServiceMetadata>
  <Commands Name="MessagesServiceMetadataCustom" Id="sq.ui.commands.ft.messages"></Commands>
```

NOTE
The grid component contains the ConfigName property, which maps the grid component to its configuration file. For example, when you set ConfigName="Custom", the grid takes its configuration from Services.Custom.config.

DisplayRules

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

Example


```
<ContextMenuItem
        Id="MarkAsRead"
        Command="MarkAsRead"
        CssClass="k-grid-menu-item"
        Text="{$resources.MarkAsRead}"
        Image="Flowtime/Images/MessagesGrid/menu-mark-as-read.svg">
  <DisplayRules>
    <Rule Value="{!ToBoolean($item.ReadOrNew)}" />
  </DisplayRules>
</ContextMenuItem>
```

The $item context object holds the row's data item properties.

For more details, see this article.

NOTE
Make sure that you deploy the board and grid customization via the project template **only** and create the required XML transformations as described in this article.