CAPITA

oneeducation

Configuring Menu Customisations

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Technical Guide

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Purpose

This guide is intended for Capita Service Desk, testers and customer Administrators to describe the files associated with the menu customisation features in the CCS Enterprise Architecture.

Background

The CCS Enterprise architecture is designed to host the entire **One** platform of modules within a single user interface, following a component based user interface design which allows links between screens to be discovered at run-time by the application shell. A consequence of this design is that for some users the number of screens they can launch from the main menu will become extensive and confusing.

Attempts to rationalise this into a coherent menu system will fail to work when the large number of different configurations based on licensing and permissions are taken into account. For this reason the menu system initially presented to the administrator after installation is simple, and allows for site based and user based customisation.

Menu Structure Files

> **NOTE:** *None of the files described here are intended to be user or administrator editable. Please use either the Manifest Generator tool or the Smart Client menu customisation screens to generate and edit these files.*

CCS Enterprise Manifest

When the CCS Enterprise Distribution Server is installed it runs a utility (held in InstallationTools\ManifestWriter subdirectory of the distribution server root) called CCSManifestWriter. This tool examines the software in the target directory and writes the CCSEnterpriseManifest.XML file containing:

- A list of all the assemblies and ancillary files which need to be deployed to the Smart Client, their versions, sizes and checksums.
- A list of all the link menus
- A list of all the components that can be reached from the main menu system.

The CCSEnterpriseManifest.XML file is downloaded by the smart client each time it connects to the distribution server and it constructs its primary default menu system (a simple list of Focus and Tools menus) from it.

Site Customisation File

One of the files installed on the Distribution Server, which is subsequently downloaded to the Smart Client is "CCS-UserInterface-Shell+CustomizedMenuComponentCollection.xml". This is an XML document containing a specification of how to organise the menu components hierarchically, including extra menus and separators. This file can be modified by the site administrator using the Smart Client "Help – Customize Menus" option.

The file created by the "Help – Customize Menus" option can be copied by the administrator to the Distribution Server to act as the site-wide customized menu specification, and will be automatically copied to all Smart Client installations.

To distribute the Site Customisation File copy the file "My Documents\Capita ICS\My Settings\ CCS-UserInterface-Shell+CustomizedMenuComponentCollection.xml" from the smart client machines that the site administrator is using, into the root of the distribution server folder structure. Re-run the manifest generator utility by navigating to the

InstallationTools\ManifestWriter subdirectory of the distribution server and typing the following command;

```
"CCSManifestWriter /TARGET=..\.."
```

The new manifest file will be written and will trigger the automatic download of the site customisation file when the Smart Client is next run.

User Customisation File

The user customisation file is the same format and is produced in the same way, as the site customisation file above. The file is generated when the user enters the "Help – Customize Menus" option and presses the OK button. Within that screen the user can modify the positioning of and name of sub-menus, and move the components around within their menu system. This file is written to the "My Documents\Capita ICS\My Settings\" folder (or an alternative location specified by the "Help – My Settings" option) and can be subsequently used by an administrator as the template for the entire site (see above).

Merging Menus and Maintenance

When the platform is upgraded new screens will be added. Initially no user can see these screens because they default to having no license and no permissions. The system administrator at this stage can grant themselves permissions to these menus and customise their placement in the site-wide customised menu scheme, and update the deployment server.

At this stage, users will not see these new menus as they will not have permissions. As permission is granted the menus will appear in the position defined by the site customisation file. Differences between the site and user customisation files are merged using the following steps;

If the menu option already exists in the users custom scheme, leave it where the user defined it, irrespective of the position defined by the site-wide customisation scheme.

If the menu option does not exist in the users custom scheme, create all the necessary sub folders and add the menu option to the users menu system. If the user already has a sub-folder with the same name and relative position (i.e. it has the same tree) the new menu option will be placed in the existing sub-folder.

If a menu option is no longer available to a user through permissions or permanent removal from the software, it will not appear on the users screen, even though they might have a custom menu scheme showing a position for it. It is not removed from their custom scheme because the removal of permissions may be temporary.

During the menu merge process the actions taken and results are logged to the file "MenuFusionLog.txt" located in the smart client program directory. This can be useful in diagnosing any inconsistencies between menu configurations.

Troubleshooting and Menu Conflicts

It is possible for the user to create complex menu schemes which are hard for local administrators to navigate. There are two options;

Log onto the users workstation using a different Windows user name – this will have the effect of using a different My Documents location, and therefore a blank customisation file, and will display the menu structures as defined in the site-wide customisation scheme.

Delete the local customisation file from the "My Documents\Capita ICS\My Settings".

> **NOTE:** *That the process of custom menu resolution is recorded in MenuFusionLog.txt.*

Limitations of Menu Customisation

The system is designed to allow as much local customisation as possible to allow users to configure the menu options to best suit them, therefore there is no facility for turning off menu customisation and no facility for enforcing site-wide schemes in preference to user defined schemes.

It is not possible to assign icons to menu items.

The storage of the user's menu settings is specific to their machine login name (the default storage directory is a sub-directory from their "My Documents" directory). User's with multiple smart client installations are recommended to set a different storage folder per application using the "Help – My Settings" menu option, otherwise all smart client installations by the same user on the same machine will use the same customized menu system.

Customisation of menus take immediate effect.

Separators between menu items are compounded from both the site and user customisation schemes, and can lead to over use of separators. We recommend system administrators do not use separators in the site wide menu schema, and create a sub menu where necessary. General usability studies indicate that a menu chain of more than 7 (+-2) options requires splitting into sub menus. A sub menu must have a minimum of one child item.

Quick Start Menus

For users who often use the same few menu options for the majority of their operations, and separate from the menu structure configuration described above, the smart client allows users to drag-and-drop menu options from the menu to the main system toolbar. This does not remove the option from their menu, but makes a copy of it. These settings are held (with other options) in the "My Documents\Capita ICS\My Settings\CCS-UserInterface-Shell+FeaturePanelStatus.xml" file.