

Default Menu and View

supportcenter.nc4.com/hc/en-us/articles/218425417-Default-Menu-and-View

E Team is delivered with a full system menu containing all reports and views available in your package option. To further customize this menu to fit your organizational needs, follow the step below to build a customized default menu.

The menu you create here will be used throughout E Team either as your Full Menu or from which all Position Menus can be built. You may add/remove options at anytime as your organizations' needs change.

Once you customize your system menu there is NOT an option to auto-restore to the delivered configuration. To restore the default you would have to update and add all menu options back to the menu. Users in the ETeam System Admin group will always see all menu items regardless of the settings made within this document. All logged in users will see menu changes at next subsequent login.

Setting the Default System Menu

User MUST be a member of the E Team System Admin group.

1. From the E Team menu, go to *Data Dictionary > Default Menu Template*.
2. Click the *Default E Team Menu* link in the view frame.
3. Click *Update* in the top right of the form window.
4. Click the View Options tab. **DO NOT** edit data under the Basic Info tab.
You may leave the Check to Allow User to Toggle Between Full/Position Menus checkbox empty. You will build your Default Menu by adding views to display.
5. Click any of the descriptive module links to display a list of views in the left box.
6. From the displayed view listing, double click on any view(s) or select and click on the appropriate buttons between the boxes to move the views to the respective boxes. Options in the box on the right will be displayed in the menu.
Module links mirror that of the E Team application's hierarchical menu setup. For example, clicking on All/My Reports causes all of the related view options to display.
7. Repeat by first selecting a module option, then individual view options until you have added all views you wish to display in this menu.
8. For Custom Forms, please take the following into consideration when choosing how to display:
 - To automatically display the ACTIVE view for all Custom Forms published at anytime within your system, select All Active Custom Forms.
 - To automatically display the ALL (INCLUDES CLOSED) view for all Custom Forms published at anytime within your system, select All Custom Forms (Includes Closed).
 - To automatically display the HISTORY view for all Custom Forms published at anytime within your system, select All Custom Forms History.
 - To **ONLY** add new Custom Forms by choice, you must NOT select any of the three all views listed in above. This will result in no Custom Form views until such time as a user with rights to this Default Menu document updates the document to add newly published Custom Forms by individually selecting and adding the specific Custom Form view for that form.

Setting the Default View

When you have finished setting up the menu, click *Set Default View* to display default view selection fields.

1. Click any of the descriptive module links to display a list of views previously selected for your system menu. Views will display in the box at right.
2. From the displayed listing, double click on a view to select it as the default view at login for all users NOT assigned to a Position Based Menu with a default view of its own.
3. Click Submit to save your System Menu or click Set Menu Options to return to the view selection options.

NEVER delete the Default Menu document, only edit as needed.