

Position Based Menus

supportcenter.nc4.com/hc/en-us/articles/217914928-Position-Based-Menus

E Team is delivered with a standard Full Menu that contains all report types and views. You can create customized Position-Based menus and assign these to position(s) within an organization based on the reports and views most commonly used by each position.

There are separate data dictionaries for Operations and Training. These must be maintained independently of each other.

The position-based menu (PBM) feature is not designed to provide security within the application. It is rather an ease-of-use function, decluttering the user's menu to provide focus on just what they need to perform their duties. E Team handles all access control security through the use of roles and groups. Instead of using the position-based menu feature to limit access control to certain menus and reports, you can create a role for your users that only has access to, for instance, the Call Center report. This will ensure that they only see Call Center reports, even if they change their position within their profile.

Once a menu is assigned to a position by assigning it using the [Organization Chart](#) it will become the default menu for any E Team user who logs into the application and selects the associated organization and position.

Modifications made to a menu template will take effect immediately, however, a logged on user won't see these changes until they:

- Refresh their browser window or,
- Log into the E Team system again.

Users who change the position on their personal profile document during a session will see the menu associated with this new position after submitting their updated profile document.

If you make menu changes during an activation you may want to send an Alert Bulletin requesting that users refresh their browsers in order to see the changes.

Positions within an organization that have not been assigned a position menu will see the E Team default menu.

Menu templates can be assigned to your organization(s) hierarchically. Example:

Template "Z" Organization A
 Position 1
 Position 1-1

Assigning Template "Z" to Organization A, Position 1, will cause it to also be assigned to Position 1-1. This allows you to assign the same template automatically to a department within an organization. You may overwrite these assignments at anytime as necessary.

Creating Menu Templates

To create/edit a PBM a user must be a member of either the E Team System Admin or E Team Managers group or have been given the privilege position_template (EDITOR).

Follow the steps below to create a menu template.

1. From the Data Dictionary in the E Team menu, select Position Template.
2. Click on Create.
3. Enter a *Template Name*.
4. Enter a *Description* by which to further identify this template.
5. Click on the *View Options* tab to display the menu fields.
6. Check the box at the top of the form to allow users assigned to this template to toggle between your default E Team menu and this Position-Based Menu.
7. Click on any of the descriptive module links to display a list of views in the left box.
8. From the displayed report listing, double click on 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.
9. Repeat as needed by first selecting a module option, then individual view options until you have added all views you wish to display in this menu.
10. When finished, click on *Set Default View* to display default view selection fields.
11. Click on any of the descriptive module links to display a list of views previously selected for this PBM in the right box.
12. From the displayed listing, double click on a view to select it as the default view at login for all users assigned to this PBM.
13. Click on *Submit* to save your Position Menu or click on *Set Menu Options* to return to PBM view selection options.
14. Click on *Clear* to remove the default view from the PBM. If no default view is identified, the user will be presented with the system default view at log in.

You can now assign your Position-Based Menu template a position within your [Organization Chart](#).

After assigning your PBM to a position(s) you can view all position assignments for each PBM by using any of the following methods:

1. Select the Position Menu Template option from your menu and click the by Assignments option.
2. Select the Position Menu Template option from your menu and select the PBM document which will now display a list of all assignments on the document while in read-mode.

Editing Menu Templates

1. From the Data Dictionary in the E Team menu, select Position Menu Template. The system displays the available Position Template listings.
2. Click on the Menu Template you which to edit. The Position Template document opens in edit mode.
3. Follow the steps used to create the template to make necessary changes.
4. When finished, click on Submit. Changes are saved, the document closes, and is displayed in read mode.

Deleting Menu Templates

To delete a PBM a user must be a member of either the E Team System Admin or E Team Managers group or have been given the privilege position_template (DELETE).

1. From the Data Dictionary in the E Team menu, select Position Menu Template. The system displays the available Position Template listings.
2. Click on the Menu Template you which to delete.
3. Click *Delete*.
4. Close the confirming dialog window. The view will refresh and the deleted PBM will no longer be listed.

Once deleted any PBM assignment will also be removed from within the organization chart positions. User logged in at the time of deletion will revert to the system default menu until such time as a new position template assignment has been made.