

# Quick Start Guide for IceMenu™ Version 1.0


## Introduction

The IceMenu™ is an all encompassing menu system designed to centrally organize your applications and/or intranet/internet sites on a user or group level.

There are two parts to the IceMenu™ menu system. First, a fully customizable and skinnable user interface that integrates login authentication and a common visual web GUI from which all users navigate a tree hierarchy of menu items defined by the administrator. Second, three menu administration applications, the Menu Designer, User Import Manager and the User Manager, used to administer and define the menu system.

## Installation

As of version 1.0 the IceMenu™ is packaged as an IceBreak framework. You must be running IceBreak version 1.150 to install the framework. Installation is a simple process:

1. Download & save the framework to the IFS location of your main IceBreak installation, in the "Frameworks" folder. I.e. <installation path>/Frameworks/
2. Login to your IceBreak web administration interface (typically on port 7000)
3. In IceBreak administration interface, navigate to Configuration > Frameworks.
4. In the Local Frameworks tab you should now see "IceBreak Menu v.1.x". Click the  button next to this framework.
5. Modify the framework installation parameters as required and click "Install".
6. After the framework has installed, go to URL and port number under which you installed the framework. I.e. <http://www.myserver.com:8000>.

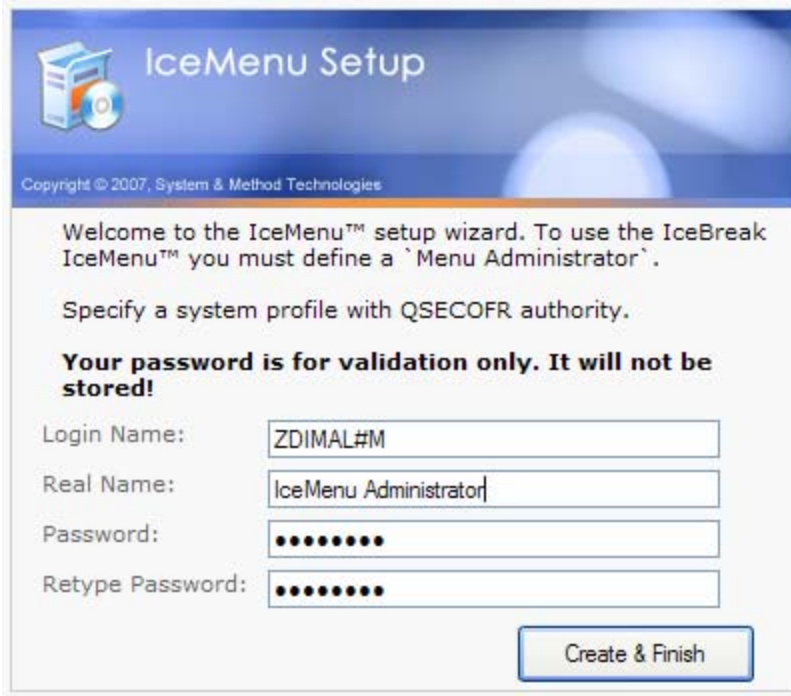
Congratulations. You have just installed the IceBreak IceMenu™.

## Initial Setup

After you have installed the IceMenu™ framework you must define a "Menu Administrator". The Menu Administrator will be the user responsible for managing the menu system and will be able to give other users access to the menu management tools. The Menu Administrator must be an OS/400 user profile with QSECOFR authority or belong to the \*SECOFR class or have \*ALLOBJ authority.

### *Field Descriptions:*

- Login Name – A valid OS/400 username.
- Real Name – A text description of the username.
- Password – A valid password that corresponds with the Login Name entered above.
- Retype Password – Used for verification.



The image shows the 'IceMenu Setup' wizard window. At the top left is an icon of a CD and a folder. The title is 'IceMenu Setup' and the copyright is '© 2007, System & Method Technologies'. The main text reads: 'Welcome to the IceMenu™ setup wizard. To use the IceBreak IceMenu™ you must define a `Menu Administrator`.' Below this, it says 'Specify a system profile with QSECOFR authority.' A bold warning states: 'Your password is for validation only. It will not be stored!'. There are four input fields: 'Login Name:' with 'ZDIMAL#M', 'Real Name:' with 'IceMenu Administrator', 'Password:' with eight dots, and 'Retype Password:' with eight dots. A 'Create & Finish' button is at the bottom right.

Once you have successfully defined a Menu Administrator you will be redirected to the main login.



The image shows the 'IceBreak Login' window. At the top left is an icon of a key and a lock. The title is 'IceBreak Login' and the copyright is '© 2006 System & Method Inc.'. The main text reads: 'Enter your login name and password as assigned. Then click "Login".' There are two input fields: 'Login Name:' with 'ZDIMAL#M' and 'Password:' which is empty. A 'Login' button is at the bottom right.

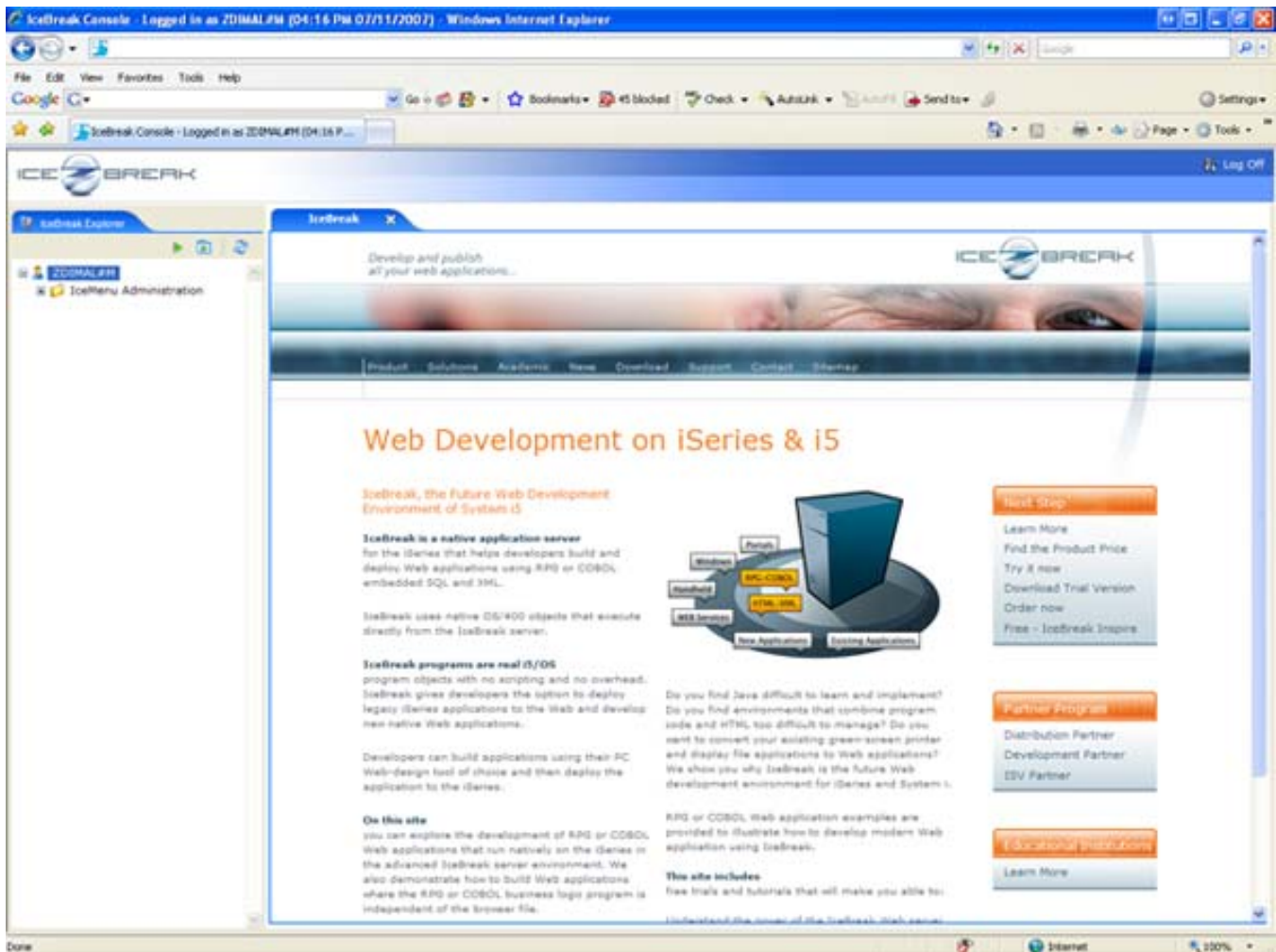
At this point it is important to note a few things:

1. This is the main login to the IceMenu™ for all users, including the Menu Administrators. The difference is that depending on the account used to login to the menu, different menu options will display based on what has been deemed accessible to that user as defined by the Menu Administrator.
2. Any user with a valid OS/400 account may login to this interface. However, only users that have been assigned menu items by the Menu Administrator will be displayed any items.

Since we have not yet defined any menu items to any users, anyone who logs in at this point will not have any menu options. The only account that will have menu items available to them is the Menu Administrator account which you have just defined.



## Logging into the Main Interface



To login simply enter your Menu Administrator username and password. After you submit a valid username and password you will be redirected to the main user interface.



The user interface contains three sections; header, navigation tree, content area.

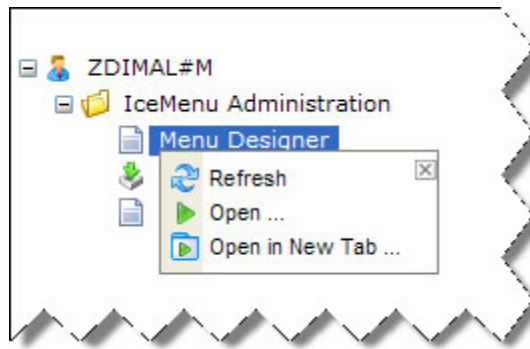
The header area contains the company logo and a “Log Off” link used to securely log off the active user.

The navigation tree is the part of the interface that uniquely changes based on the user menu options. The menu items display in a tree hierarchy defined by the Menu Administrator and function similarly to Windows based tree applications such as Windows Explorer. Users can click the  sign to expand menu options that have child items available to the user and can click the  sign to collapse open menu items for easier navigation.

*Note: Under certain circumstances it is possible for a menu option to have a  sign next to an item; however, it may not contain any child items. This is because the IceMenu™ allows you to load child items from an external data source such as a third party application or your own custom program. As of version 1.0 the IceMenu™ does not know if any children exist until the user tries to expand the menu item. If no menu items are available the  sign next to the clicked menu option will disappear.*

Clicking a menu item will cause it to load the application in the content area. Not all menu items may open an application. An administrator may choose to create logical menu items for grouping/organizational purposes only – such as a folder that contains many programs. Clicking the folder would normally not execute an application (unless of course you would like it to).

The content area is simply a frame in which applications run. It is possible to open multiple applications in separate tabs. This can be done by right clicking on the application that you wish to open and selecting “Open in New Tab”.



## User Import Manager

In order to designate menu items to a user we must first have a list of users we would like to work with. It is impractical to work with a list of all users on the system. Many systems contain user profiles that are not specifically used by actual human users. The User Import Manager will aid you in importing only those accounts that you plan to give menu options to.

*Note: The IceMenu™ has a facility by which you can grant global access to menu items allowing any user with a system account to see these menu items. It is not necessary to import users that will only have global menu items in their tree.*

The User Import Manager imports users based on filter criteria that you define. You may want to initially click the “Preview Filtered Data” option to view what would be imported. Based on this information you can then setup an unlimited number of filters to isolate the accounts you are interested in defining custom menus to.

Once you are satisfied with your filter criteria, simply click the “Run Import” button to import the user profiles.

## User Manager

The Users Manager allows you to maintain the IceMenu™ user profiles. The user list contains a list of all users that have been imported or created for use in the IceMenu™.

The User Manager allows the creation/addition of two types of users.

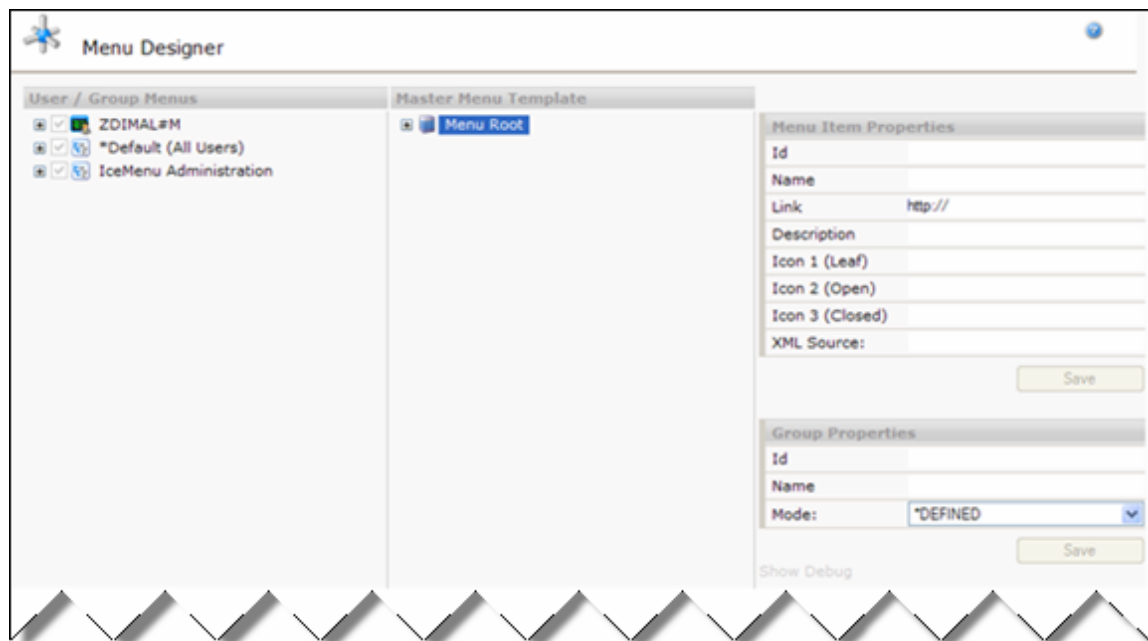
1. System users. These are OS/400 accounts that exit on the system. You may manually add OS/400 system accounts to the IceMenu™. The user name entered will be cross checked against the system to ensure it is valid.
2. Web Users. These are non-system accounts meaning that they are ad-hoc accounts that do not exist on the OS/400, however, they created to allow non-system users to login to the menu (i.e. External customers, VARS, Dealers).

*Note: It is possible to associate a system account to a web account. This means that even though a user logs into the IceMenu™ with a non-system profile, they are logged in behind the scenes with a system account. For example, this allows you to define non-system users while still upholding system security by associating them with a limited account. See Menu Designer documentation for more information on how to associate web users.*

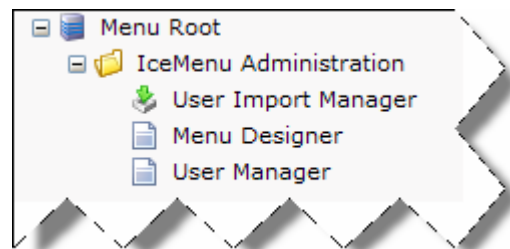
## Menu Designer

The Menu Designer is used to define the menu structure, hierarchy and menu item access. It consists of four sections; User/Group Menus (Tree), Master Menu Template (Tree), Menu Item Properties, Group Properties. All functionality related to the Master Menu Template and the User/Groups Menus section such as creating new menu items, deleting menu items, associating menu items, etc. can be through drag and drop and right click options similar to working in a Windows environment.

*Tip: After installing the IceMenu™ the Menu Designer will be pre-populated with a few menu items. Expand the menu items in the Master Menu Template & the User/Group Menu to get an understanding of the associations and how they are linked to your own user profile.*



## Definitions



- Child/Children – The sub items directly under an item. I.e. IceMenu Administration is a child of the Menu Root.
- Sibling – Any items that have other items next to it. I.e. The User Import Manager has two siblings; Menu Designer and the User Manger.
- Parent – User Manager’s parent is the IceMenu Administration menu item.
- Node – A generic name representing one menu item.
- Branch – A part of a tree and everything below it. IceMenu Administration can be considered a branch and would represent everything below it.
- Leaf – A menu item with no other child items.

### Master Menu Template vs. User/Group Menus

The Master Menu Template is a tree that defines the overall hierarchy of your menu system. It is completely up to the Menu Administrator how the Master tree will be laid out, how many menu items deep it will be, etc. It is our recommendation (however you are not bound to our recommendation) that you organize your menu structure on a per application basis. For example, use a folder to contain all the possible menu items of an application.

The User/Group Menus section is a tree that defines all the users we have chosen to import into the IceMenu™ and all their associations. This would be considered the “Users” in “User/Group Menus”. It also contains “Groups Menus”. Group Menus are logical groupings of menu items. This allows the Menu Administrator to take parts (or branches) of the Master Menu Template tree and define logical groups. Furthermore, we can also enable/disable certain applications in the Group. This will be explained in greater detail below.

## Master Menu Template

The Master Menu Template is a tree control, same as the main interface's navigation. The difference is that we are able to maintain menu items by right clicking.

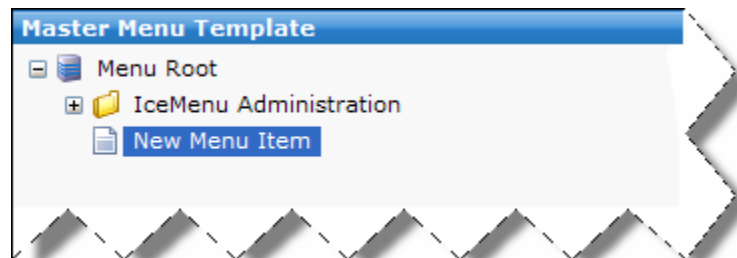
The menu begins with a "Menu Root" which is a "super node" to which all other menu items attach.

### Creating new Menu Items & Editing it's Properties

To create a new menu item simply right click on an existing item under which you would like the new one to appear and choose "Add Child".



A new menu item will be created.



Select the new menu item by clicking on it. The "Menu Item Properties" area will become highlighted. The Menu Item Properties can now be modified to suit your application. Once you have made the changes in the Properties area, click Save. Your changes will be saved back to the server and the Master Menu Template section will automatically change to reflect the new name you have given the item.

#### Field Descriptions:

- Id – Internal menu item id. (Informational only)
- Name – The name that will appear as the title for item.
- Link – The http accessible link to the application that will be executed when the menu item is clicked. I.e. <http://server/inventory.rpgle> or <http://www.google.com>
- Description – A description of the menu item or application.
- Icon 1 (Leaf) – The icon to display when there are no other sub items.
- Icon 2 (Open) – The icon to display when the item is expanded. This only applies to items with child items. (f1.gif for a folder open image)
- Icon 3 (Closed) – The icon to display when the menu item is collapsed. This only applies to items with child item. (f2.gif for a folder closed image)
- XML Source – An http link to an XML data source. More information below. Default is \*DEFAULT.

Menu Item Properties	
Id	145
Name	New Menu Item
Link	
Description	
Icon 1 (Leaf)	d.gif
Icon 2 (Open)	d.gif
Icon 3 (Closed)	d.gif
XML Source:	*DEFAULT

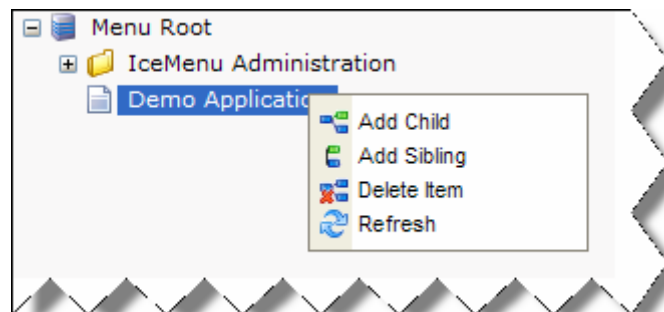
Save

It is now also possible to right click on the new menu item you have just created and create more sub items or sibling items.

### Deleting Menu Items

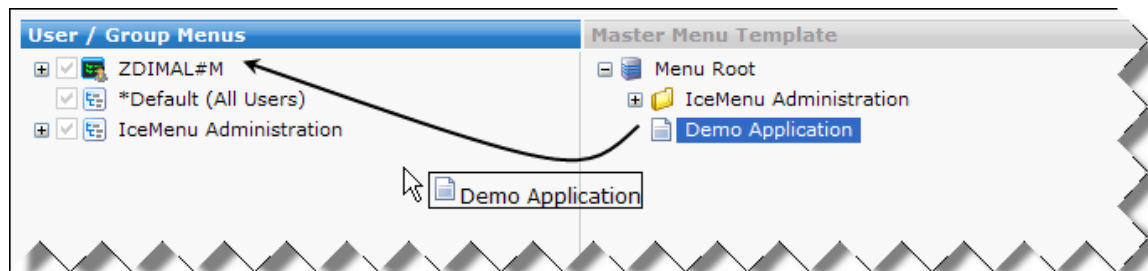
To delete any menu item right click it and choosing "Delete Item". Keep in mind that if a menu item contains child nodes, all child nodes will also be deleted.

*Note: If the item you wish to delete is part of any user's menu items it will also be removed from that user's menu item list.*

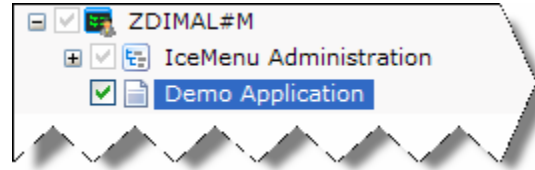


### Associating a Menu Item to a User

Adding a menu item to a specific user's menu tree is quite simple; simply click and drag the menu item you wish to give to the user from the Master Menu Template and drop it onto the user in the User/Groups Menus section.

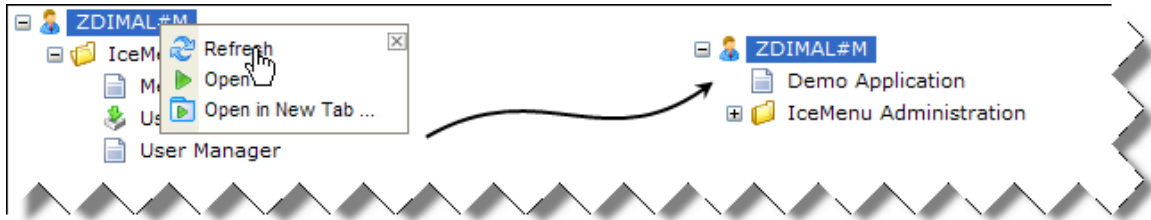


The user now has the menu item in their tree; however, we must enable it before it becomes visible to the user. To enable the menu item we simply check the checkbox next to the menu item.



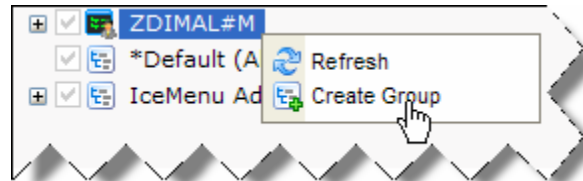
*Note: If the user is logged in they will not see the new menu item until they login again or if they right click on their main navigation menu and refresh their root menu item.*

Since in this example we have added the menu item to the user profile in which we are currently logged in as, we can refresh our main interface menu tree to view the new entry.



### Creating a Menu Group

To create a new menu group, right click any menu node in the User/Group Menus tree. A context menu will display. Select "Create Group". A new menu group named "New Group" will be appended to the bottom of the tree.



Click the new group. Notice that the Group Properties area becomes highlighted.

#### Field Descriptions:

- Id – Internal menu item id. (Informational only)
- Name – The name that will appear as the title for group menu. No other significance other than to easily identify it.
- Mode –
  - \*DEFINED. The group must be assigned to users in order for it to display in a user's tree
  - \*ALL. Allows the menu options to become available to anyone who signs into the IceMenu™. Makes all menu options within the group to become "global" to anyone with a valid sign-on.

