



V6.09 Training Manual



Menu



Find the freedom to focus on what matters with Nimbus

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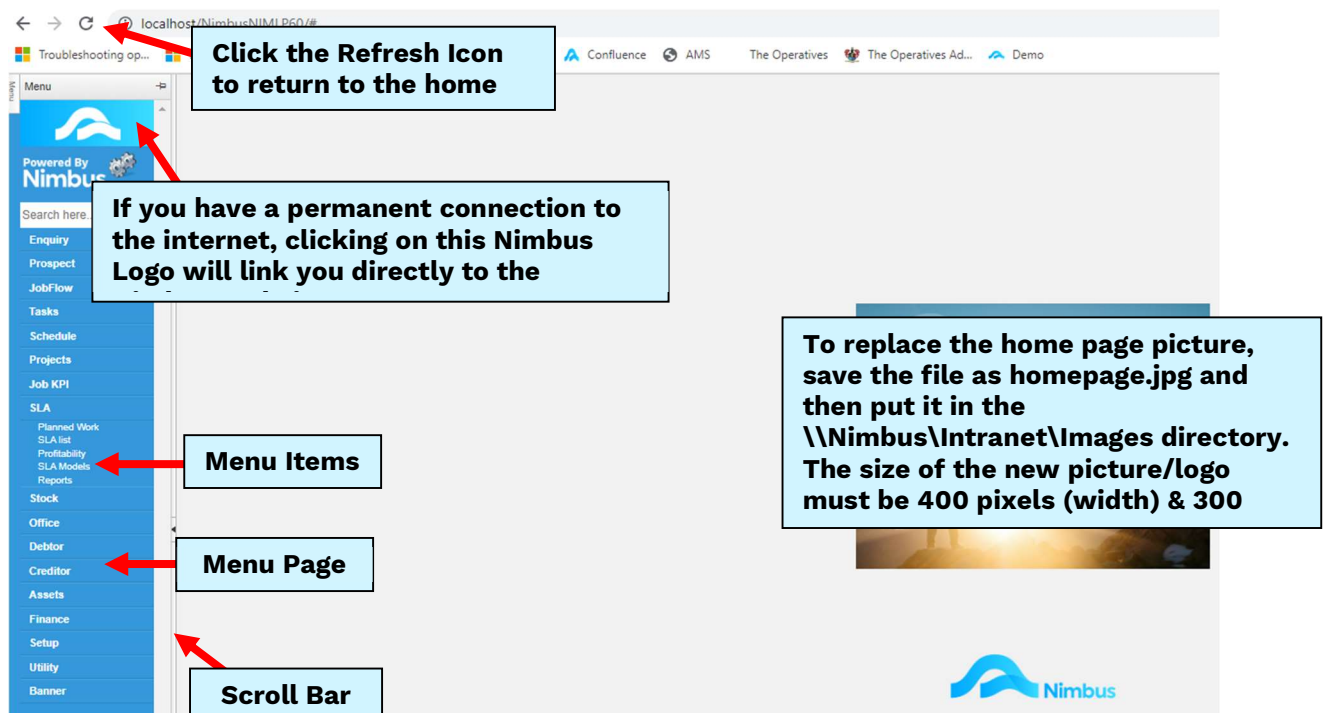
Overview

A menu is an important navigation tool. The Nimbus Intranet Menu is used to make enquiries, run reports, log/issue jobs, generate quotes, raise purchase orders, post time and materials, look up contact details and do anything else that is added to it.

The **Menu Pages** are listed on the left-hand side of the screen when Nimbus is first opened.

- **Menu Pages** hold **Menu Items**; this is because **Menu Items** are assigned to a **Menu Page**.
- Clicking on each **Menu Page** opens the list of **Menu Items** for that **Menu Page**.

You can open as many Menu Pages as you want. A scroll bar will appear when the Menu as a whole exceeds the screen boundaries. If the Menu gets too long and becomes too cumbersome to use, click the **Refresh** button. This action will cause the **Menu Pages** to be contracted, ie. All **Menu Items** disappear from view leaving only the list of **Menu Pages**.



Menu Pages and **Menu Items** can be created and/or edited using the Web Menu Application. **Menu Items** can be set to link to a Nimbus Application or to a Nimbus Report. The reports will be displayed in the frame to the right of the Nimbus Menu. Once **Menu Pages** and **Menu Items** are created, they can be allocated to a User Group so that only that User Group will have access to them.

Creating Menu Pages and Menu Items

The Web Menu Application creates Menu items, as shown below. Accessed from **Setup** menu, **Menu Editing** menu item. Click on the Item Description

Menu Editing : For viewing and editing Menu Items. Shows all Items. Drill to editing that shows issued Groups
 Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Page	Menu Description	Pick Order Menu	Menu Title	Pick Order Title	User Cou...	User List	Link Type	Report	Nimbus App	Link URL	Detailed Description
Assets	Asset Groups	110	Work	10	1	NAdmin	WebRpt	Asset Groups			Setup Asset Groups, for GL Integration of Divisions Assets.
Assets	Asset List	70	Work	20	1	NAdmin	WebRpt	Assets			To locate an Asset Item or an Asset Task. Used to edit and r
Assets	Asset Register	80			1	NAdmin	WebRpt	Asset Register			Financial information on assets owned by the organisation.
Assets	Depreciation	90			1	NAdmin	NimApp		NAAssRg	/d [dset]	For calculating monthly/annual depreciation amounts and f
Assets	Models	100			1	NAdmin	WebRpt	Asset Models		Category=Asset	To view and/or edit existing Asset Models and Asset Model T
Assets	Planned Work	50			1	NAdmin	WebRpt	Planned Work		ModelCategory=Asset	Creates a Maintenance Job for recurring work.
Assets	Plant List	20			1	NAdmin	WebRpt	Plant List			List of all Assets that can be charmed to Inhe

Menu Item:

Menu Page:

Pick Order:

Description on Page:

Title:

Description on Tile:

LinkType:

Report:

Nimbus App:

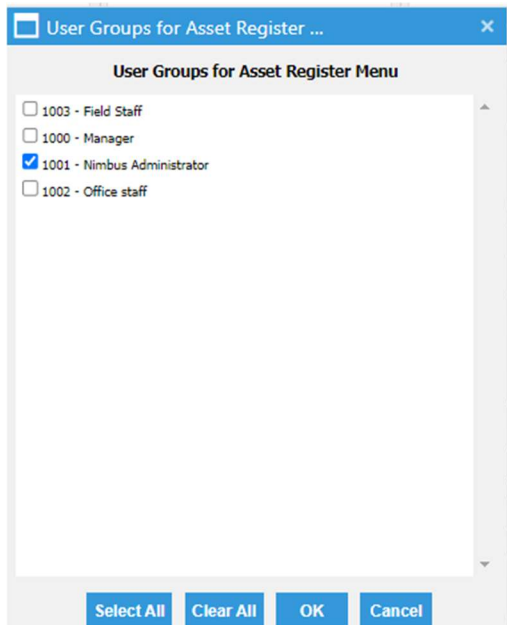
LinkURL:

Copy
Delete
New
Ok
Cancel
Apply

Note the **New**, **Copy** and **Delete** buttons located at the bottom of the **Web Item Setup** form:

- Clicking the **New** button allows users to create a new Menu Page/Item.
- Clicking the **Copy** button allows users to copy the existing Menu Item setup so that it can be linked to a different Menu Page.
- Clicking the **Delete** button allows users to delete a Menu Item. Note Menu Pages cannot be deleted if there are Menu Items linked to them. This means that before a Menu Page can be deleted, users need to delete all Menu Items linked to that Menu Page, or edit each Menu Item so that it is linked to another Menu Page. Also note that if there are no Menu Items linked to a Menu Page, then that Menu Page will not show on the menu. This is automatic and may be a better option than deleting a Menu Page.

Groups If some User Groups are not to have access to a Menu Items, clicking the **User Count** button will allow the Menu Page/Items to be assigned to specific User Groups only.



Menu Pages

To edit an existing Menu Page:

1. From the **Setup** menu page click on the **Menu Editing** menu item. This action displays a listing of all existing Menu Pages and Menu Items.
2. Use the **Page** filter field to find the Menu Page you want to edit. This action also lists all Menu Items linked to the selected Menu Page.

Click on the name of any Menu Item held in the **WebMenuEditID** column. This action opens the Web Menu Setup Application.

Menu Editing : For viewing and editing Menu Items. Shows all Items. Drill to editing that shows issued Groups
 Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Page	Item Description	Pick Or... Me...	Menu Title	Pick Or... Title	User Co...	User List	Link Type	Report	Nimbus App	Link URL	Detailed Description
Assets	Asset Groups	110	Work	1							
Assets	Asset List	70	Work	2							
Assets	Asset Register	80									
Assets	Depreciation	90									
Assets	Models	100									
Assets	Planned Work	50									
Assets	Plant List	20									
Assets	Profitability	30									
Assets	Read Meters	40									
Assets	Reports	120									
Assets	Road User	60									
Assets	Workshop	10									
Banner	CRM Contacts	20									
Banner	In/Out	10									
Banner	Reset	40									
Creditor	Account History	40	Work	3							
Creditor	Cheque Listing	90									
Creditor	Creditor Dashboard	75									

Nimbus Web Menu Designer - Nimbus Optimum

File Help

Web Menu Items Setup

Menu Item: Depreciation

Details: For calculating monthly/annual depreciation amounts and for dealing with the disposal of assets.

Menu Page for Item: Assets

Include in all Groups:

Buttons: New Copy Delete

Web Menu Pages

Menu Item Link: Nimbus Application

Nimbus Application: Asset Register

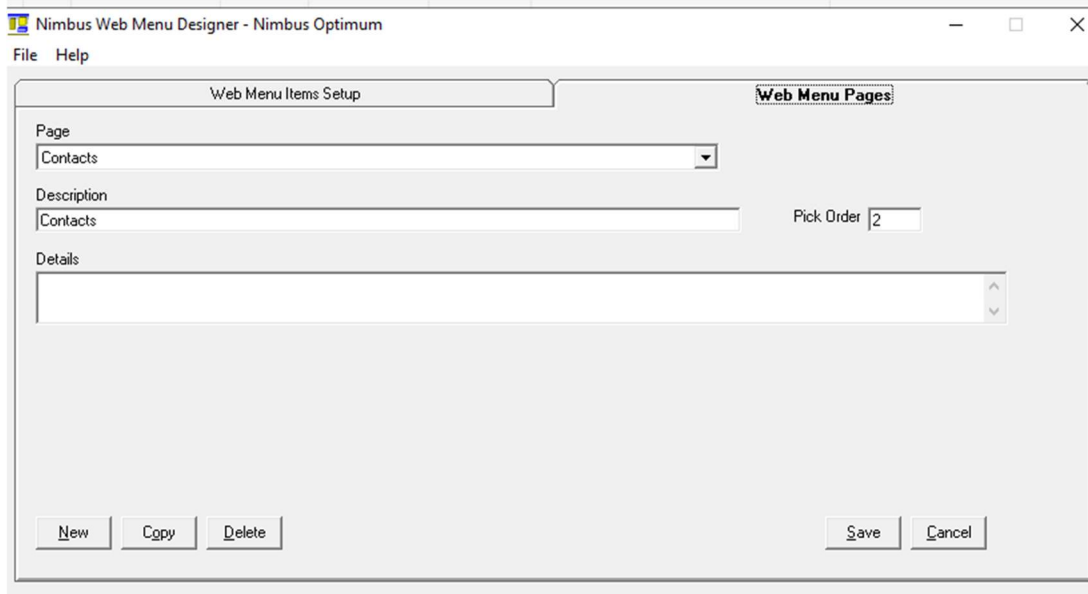
Command Line: /d [dset]

Report Name:

Buttons: Edit Save Cancel

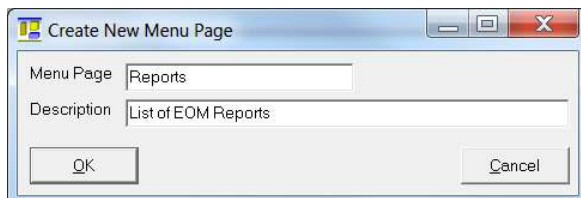
3. Click on the **Web Menu Pages** tab.
4. Select the Menu Page from the drop-down list held in the **Page** field.

5. Edit as required and then click the **Save** button to record changes made.



To create a new Menu Page:

1. Open the Web Menu Setup Application, as above.
2. Click on the **Web Menu Pages** tab and then click on the **New** button.
3. Enter the name of the new Menu Page in the **Menu Page** field and the description for this Menu Page in the **Description** field; this field is limited to 25 characters. For example:



4. Click the **OK** button. This action creates the new Menu Page.
5. If required, enter a more detailed description of the Menu Page in the field below the **Description** field.
6. The **Pick Order** field is used to list Menu Pages in a certain order. Enter a number in this field to reflect the order listing you want for this page. The smaller the number, the higher the Menu Page is placed on the list. The pick order numbers for the Menu Pages in the master database are given below:

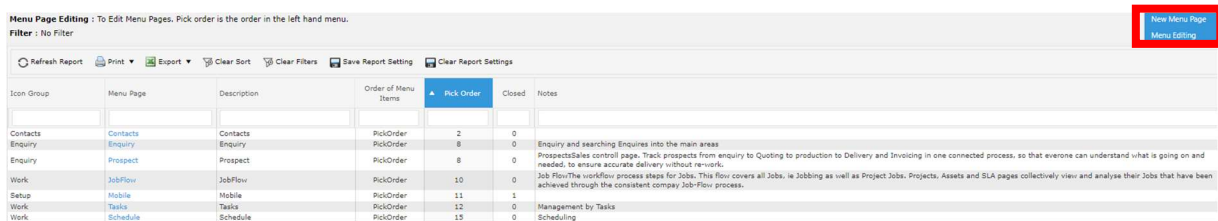
Menu Page	Pick Order	Menu Page	Pick Order	Menu Page	Pick Order
Enquiry	8	Job KPI	25	Creditor	56
Prospect	8	SLA	25	AssetM	60
JobFlow	10	Stock	40	Finance	70
Schedule	15	Office	50	Setup	95
Projects	20	Debtor	54	Utility	98

7. Click the **Save** button to record changes. (Note that a new Menu Page is not displayed on the Menu until at least one Menu Item has been assigned to it.)

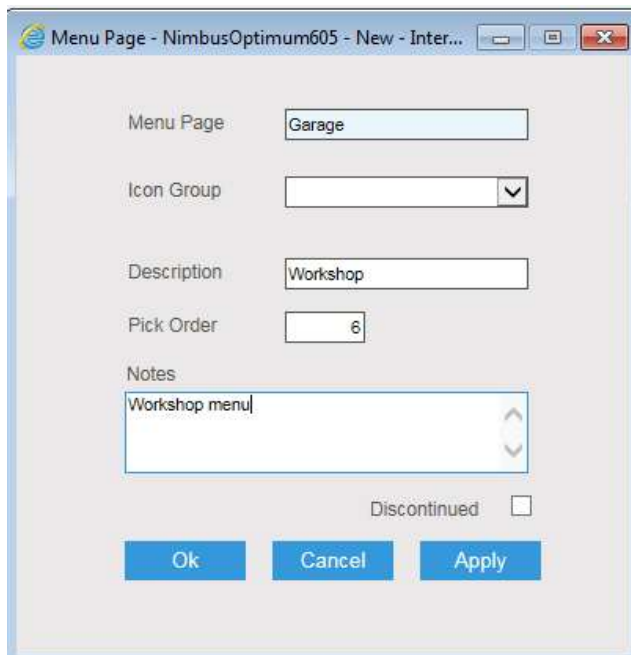
Alternatively, from the **Menu Editing** report click on the **Pages** header link



Which will take you to the **Menu Page Editing** report, click on the **New Menu Page** header link



Which will open a form allowing you to create new Page



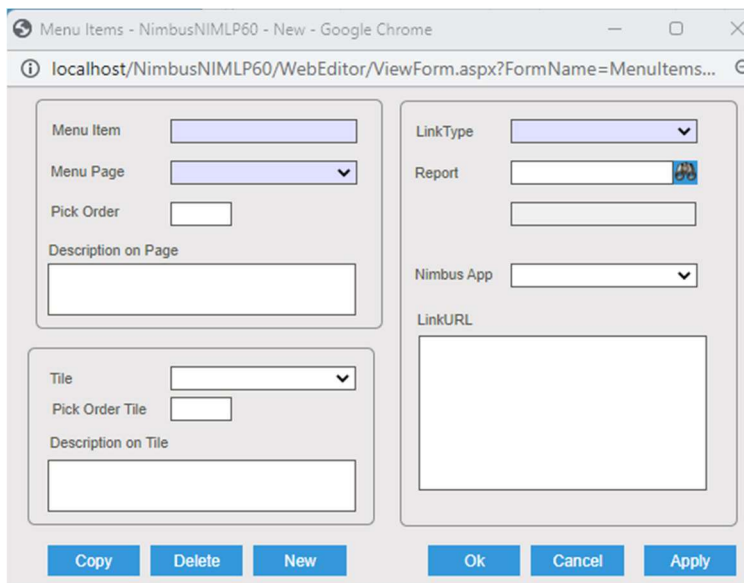
Menu Items

To edit an existing Menu Item:

1. From the **Setup** menu page click on the **Menu Editing** menu item. This action displays a listing of all existing Menu Pages and Menu Items.
2. Enter the name of the Menu Item to be edited in the **Item Description** filter field and then press the **Enter** key to apply the filter.
3. Click on the name of the Menu Item to be edited. This action opens the Menu Editing Item.
4. Edit as required and then click the **Save** button to record changes made.

To create a new Menu Item:

1. Click on the name of any Menu Item held in the **WebMenuEditID** column. This action opens the Web Menu Setup Application.
2. From the **Web Menu Items Setup** tab, click on the **New** button.
3. Enter the name of the new Menu Item in the **Menu Item** field; this field is limited to 25 characters. Don't use a long name as the menu column is not very wide.



4. Click the **OK** button. This action creates the new Menu Item.
5. Enter a more detailed description for this Menu Item in the **Details** field.
6. To allocate the item to the user groups click on the User Count column

Page	Item Description	Pick Order Menu	Menu Title	Pick Order Tile	User Cou...	User List	Link Type	Report	Nimbu
Assets	Asset Groups	110	Work	10	1	NAdmin	WebRpt	Asset Groups	
Assets	Asset List	70	Work	20	1	NAdmin	WebRpt	Assets	
Assets	Asset Register	80			1	NAdmin	WebRpt	Asset Register	
Assets	Depreciation	90			1	NAdmin	NimApp		NAAAs:
Assets	Models	100			1	NAdmin	WebRpt	Asset Models	
Assets	Planned Work	50			1	NAdmin	WebRpt	Planned Work	
Assets	Plant List	20			1	NAdmin	WebRpt	Plant List	
Assets	Profitability	30			1	NAdmin	WebRpt	Plant Profit Summary	
Assets	Read Meters	40			1	NAdmin	WebRpt	Meter Reading	
Assets	Reports	120			1	NAdmin	WebRpt	Web Reports	



7. Menu Items can be setup to link to a web report, a web page or an Application. To set up a link:

- a. In the **Menu Item Link** section of the form, click on the **Edit** button.
- b. From the drop-down list in the **Type** field, select the type of link this Menu Item will have. Refer to steps (8) to (14) below for further instructions.



8. To link to any web report, select the **Web Report** type and then click the **Open** button to select the name of the web report. Use the lookup to make the selection. Refer to the **Notes** field for further instructions and then click the **OK** button to save changes.
9. To view the existing Menu Items that use this link type, enter 'Web Report' in the **Link Type** filter field located on the **Menu Editing** web report. To link to a Nimbus Application (i.e. Job Posting, Enquiries & Reports), select the **Nimbus Application** type and then use the drop-down list in the **Nimbus Application** field to select the application. Specific parameters can be entered in the **Parameters** field. Refer to the **Notes** field for further instructions and then click the **OK** button to save changes.
 - /d is the parameter for the dataset name held in Nimbus Security. If it is not specified, Nimbus will use the default dataset that has already been set up, represented as [dset].
 - Other parameters settings can be gleaned by looking at existing links.
 - To test that the link works correctly, click the **Test** button.
10. To link to a Windows application (i.e. Word, Excel), select the **Other Application** type and then click the **Open** button to select the application. Refer to the **Notes** field for restrictions click the **OK** button.
 - To test that the link works correctly, click the **Test** button.
 - To view the existing Menu Items that use this link type, enter 'WinApp' in the **Link Type** filter field located on the **Menu Editing** web report.

Page	Item Description	Pick Order Menu	Menu Title	Pick Order Title	User Cou...	User List	Link Type	Report	Nimbus App	Link URL	Detailed Description
							win				
Utility	Patches	130			1	NAdmin	WinApp			[NPath]\app\installs\Patches\Applications_.../u [npath] /m Client auto	Updates Client Patches. Runs t
Utility	Patches Admin	131			1	NAdmin	WinApp			[NPath]\app\installs\Patches\Applications_.../u [npath] /m Client manual	Updates Client Patches. Runs t set up

11. To open a web page or .html file in the existing browser, select the **Web Address Same Browser** type and then enter the web address details. Refer to the **Notes** field for restrictions, click the **OK** button.
 - To view the existing Menu Items that use this link type, enter 'URLSame' in the **Link Type** filter field.
12. To open a web page or .html file in a new browser, select the **Web Address New Browser** type and then enter the web address details. Refer to the **Notes** field for restrictions, click the **OK** button.
 - To view the existing Menu Items that use this link type, enter 'URLNew' in the **Link Type** filter field.
13. To open Nimbus web dialogs, select the **TRM Dialog** type and then enter the path/address details. Refer to the **Notes** field for restrictions, click the **OK** button.
 - To view the existing Menu Items that use this link type, enter 'TRM' in the **Link Type** filter field.

14. If the **Open File** type is selected, enter the file path and name. Refer to the **Notes** field for further instructions and then click the **OK** button to save changes.
 - To test that the link works correctly, click the **Test** button.
 - To view the existing Menu Items that use this link type, enter 'File' in the **Link Type** filter field.
15. When the link type has been set up, click the **Save** button and then click the **Cancel** button to exit.

Menu Editing Web Report

The Menu Editing web report has been written to show the setup details for the existing Menu Pages and Menu Items and to facilitate the editing of the menu page/item details.

Path and/or address information is held in the **LinkURL** column of the Menu Editing report. This column can be referred to when users want to create a new Menu Item, ie. Find a path that is similar to the one you want and then copy and paste the path held in the **LinkURL** column to the new Menu Item.

To open the Menu Editing report for the purpose of copying existing paths and parameters:

1. From the **Setup** menu page click on the **Menu Editing** menu item. This opens the Menu Editing report.
2. Use the **Link Type** filter field to find all existing Menu Items with a certain link type.

CODE	LINK TYPE
WebRpt	Web Report
NimApp	Nimbus Application
WinApp	Other Application
URLSame	Web Address Same Browser
URLNew	Web Address New Browser
TRM	TRM Dialog
File	Open File

3. Once you have filtered for a specific link type, refer to the **LinkURL** column to view setup information for the selected link type. The screenshot below shows the Menu Items that use the 'URLSame' link type.

Page	Item Description	Pick Order Menu	Menu Title	Pick Order Title	User Count	User List	Link Type	Report	Nimbus App	Link URL	Detailed Description
							urls				
Banner	In/Out	10			4	Manager:NAdmin...	URLSame			NevReports/NevInout.aspx?InOutName={staff}	
Banner	Reset	40			1	NAdmin	URLSame			webreports/reset.aspx	
Enquiry	Search Content Store				0		URLSame			Web2/RunOpenWeb2Link.aspx?URL=/app/nimbus/nimbus/DM/content_store/[path]/[dset]/EmployeeHomePage&rs:Co...{Staff}	Search Content Store
JobFlow	Home Page	10			1	NAdmin	URLSame			Scheduler/PgSchedulerGenericFilter.aspx?Type=Staff&Date=Today(+0)	A picture of your stuff
Schedule	Leave Approval	8			1	NAdmin	URLSame			Scheduler/PgSchedulerGenericFilter.aspx?Type=Staff&Date=Today(+0)	View leave timeline and approve
Schedule	Leave Planner	7			1	NAdmin	URLSame			Scheduler/PgSchedulerGenericFilter.aspx?Type=Staff&Date=Today(+0)	View leave timeline; apply for leave
Schedule	My Timesheet (Commit)	2			1	NAdmin	URLSame			Scheduler/PgSchedulerGenericFilter.aspx?Type=StaffCom&Where=Employee='{Staff:StockID}={TimeStockID}	Enter timesheet/commit time
Schedule	My Timesheet (Confirm)	1			1	NAdmin	URLSame			Scheduler/PgSchedulerGenericFilter.aspx?Type=Staff&Where=Employee='{Staff:StockID}={TimeStockID}	Enter timesheet/confirm time
Schedule	Timesheet (Timeline)	4			1	NAdmin	URLSame			Scheduler/PgSchedulerGenericFilter.aspx?Type=StaffTL&Date=Today(+1)	View timeline
Setup	Colour Scheme	90			1	NAdmin	URLSame			ColourSchemeSelector.aspx	Used to change Nimbus colour scheme
Setup	Tile Page				1	NAdmin	URLSame			MenuTiles.aspx	Tile display of menu items
Utility	Site Config	50			1	NAdmin	URLSame			Documents.aspx?Folder=[path]/NimbusProcedures/Configuration	Specific configuration notes for this site.
Utility	Support	150			4	Manager:NAdmin...	URLSame			https://get.teamviewer.com/6nt72mb	Tool used to invite remote support
Utility	Test Intranet	90			4	Manager:NAdmin...	URLSame			Test.aspx	Tests the intranet connections.
Utility	Test Reports	100			4	Manager:NAdmin...	URLSame			webreports/settings.aspx	Reset and Test Web Reports

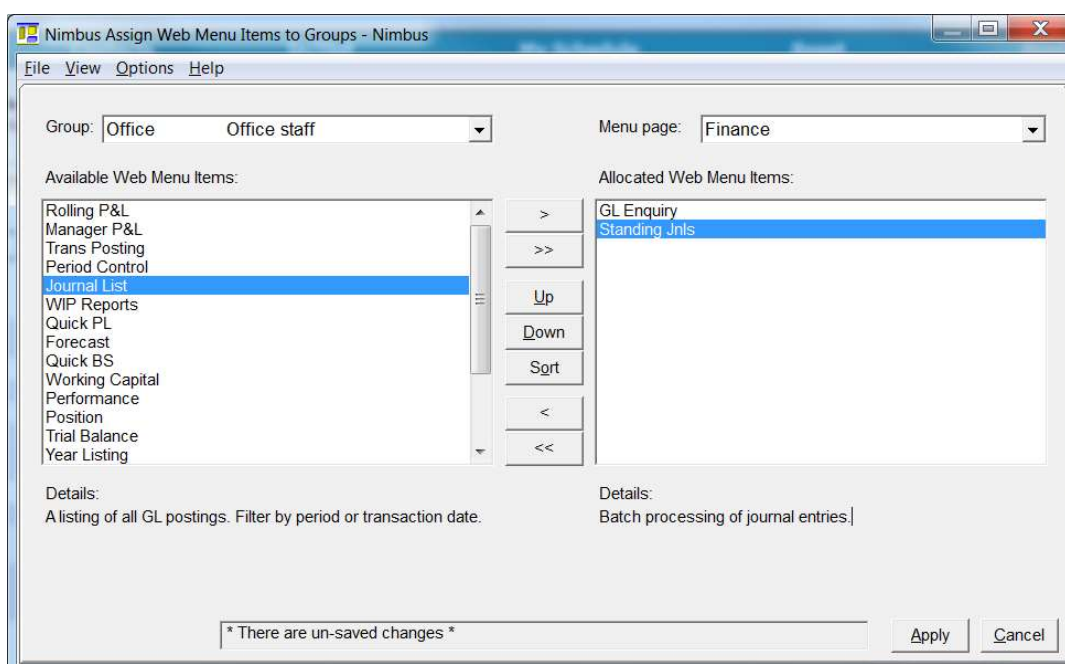
4. To use an existing command held in the **LinkURL** column, select the command, copy it (Ctrl + C), and then paste it (Ctrl + V) into the **Link Properties, Address** section of the Menu Item being created/edited. (Note that for this to work correctly, the Menu Item being created/edited must have the same link type as the Menu Item you are copying commands from.)
5. Edit the command as required and then save the Menu Item details.

Menu Security

Menu Pages and/or Menu Items can be made available for everyone or for selected User Groups only. Access rights will vary for each organisation.

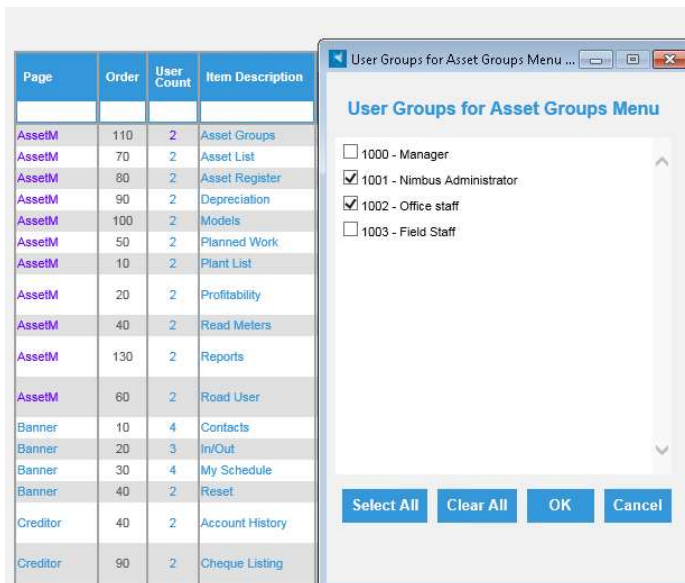
To assign a Menu Item to the User Group that will need to use it:

1. From the **Setup** menu page click on the **Menu Editing** menu item. This action displays a listing of all existing Menu Pages and Menu Items.
2. Use the **Page** filter field to find the Menu Page that will need access rights set up for it. This action also lists the Menu Items linked to the selected Menu Page, in the **Item Description** column.
3. Click on the **WebMenuEditID** field of the Menu Item that needs access rights set up for it. This action opens the Web Menu Setup Application.
4. Click the **Groups** button.
5. From the drop-down list in the **Group** field, select the User Group for which access rights are to be set.
6. From the Group drop-down list in the **Menu Page** field, select the menu page for which access rights are to be set for the selected User Group.
7. The available Menu Items are listed on the left-hand side of the form. The Menu Items that have been allocated to a User Group are listed on the right-hand side. For example, in the screenshot below, the users assigned to the 'Office' user group will see the 'Finance' menu page, however they will only see the 'GL Enquiry' and 'Standing Jnls' menu items on this menu page.



8. To assign a Menu Item to the selected User Group:
 - a. From the list of available menu items, select the Menu Item to be assigned by clicking on it.
 - b. Click on the **>** button to move the selected Menu Item to the list of allocated menu items.
 - c. Repeat until all Menu Items to be assigned are displayed in the list of allocated menu items.
 - d. If all available menu items are to be assigned, click the **>>** button. This action will transfer all menu items to the list of allocated menu items in one move.
 - e. Use the **Up** and/or **Down** buttons to arrange all assigned menu items into the order they are to be displayed on the intranet menu, underneath the Menu Page name. Alternatively, if the listing order is to be alphabetical, click the **Sort** button. This action will arrange all assigned menu items into alphabetical order.
 - f. If you allocate a menu item in error, select the menu item and then click the **<** button to move it back to the list of available menu items. (If all menu items are to be returned, click the **<<** button.)
9. Click the **Apply** button to save changes.
10. Repeat the above steps for any other User Group access rights that need to be set.
11. Click the **Close** button to return to the Web Menu Setup Application.
12. Click the **Cancel** button to close the Web Menu Setup Application.
13. Alternatively, from the Menu Editor report click on the User Count and tick the required group.
14. Alternatively use the User Count column for the Menu Edit report

Page	Item Description	PICK Or... Me...	Menu Tile	PICK Or... Tile	Use Co...	User List	Link Type	Report	Nimbus App	Link URL
Assets	Asset Groups	110	Work	10	1	NAdmin	WebRpt	Asset Groups		
Assets	Asset List	70	Work	20	1	NAdmin	WebRpt	Assets		
Assets	Asset Register	80			1	NAdmin	WebRpt	Asset Register		
Assets	Depreciation	90			1	NAdmin	NimApp		NAAssRg	/d [dset]
Assets	Models	100			1	NAdmin	WebRpt	Asset Models		Category=Asset
Assets	Planned Work	50			1	NAdmin	WebRpt	Planned Work		ModelCategory=Asset
Assets	Plant List	20			1	NAdmin	WebRpt	Plant List		
								Plant Profit		



Menu Rules

If a Menu Page does not hold a Menu Item, the Menu Page will not be displayed in the Menu.

If a new Menu Page has been created, the Menu must be refreshed before the Menu Page is displayed.

If a Menu Item has not been allocated to a User Group, it will not be displayed for that User Group.

If all Menu Items belonging to a Menu Page have not been allocated to a User Group, then that Menu Page will not be displayed.

Deleting Menu Pages and Menu Items

If required, Menu Pages and Menu Items can be deleted. However, keep in mind that delete means delete and there is no undo button if you change your mind.

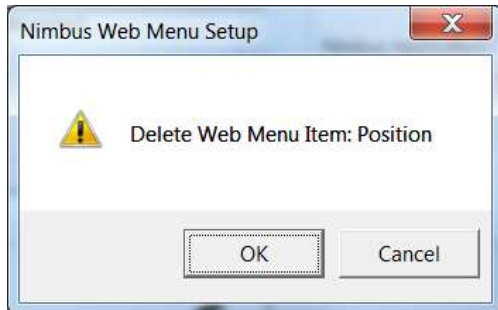
Note that Menu Pages cannot be deleted if there are Menu Items linked to them. This means that before you can delete a Menu Page, you will need to either delete all Menu Items linked to that Menu Page, or edit each Menu Item so that it is linked to a Menu Page that will not be deleted.

Note also that if there are no Menu Items linked to a Menu Page, then that Menu Page will not show on the menu. This is automatic and can be a better option than deleting a Menu Page. This is because the Menu Page will remain in the database for future use and it will only be displayed in the menu if a Menu Item is linked to it at some future point in time.

To delete a Menu Item:

1. From the **Setup** menu page click on the **Menu Editing** menu item.
2. Use the filters to locate the Menu Item to be deleted.

3. Click on the name of the Menu Item (located in the **Item Description** column) to open the Web Menu Setup Application.
4. Click on the **Delete** button.
5. You will be asked to confirm the 'delete' action; click **OK** to confirm.



6. Close the Web Menu Setup Application and refresh the Nimbus Intranet. This action will remove the Menu Item from the list held in the Menu Page. Note that if this is the last Menu Item to be removed from the Menu Page, this action will also remove the Menu Page from the menu.