
Reference Guide -

Treeview Builder v10x (ADF)

By CMiC

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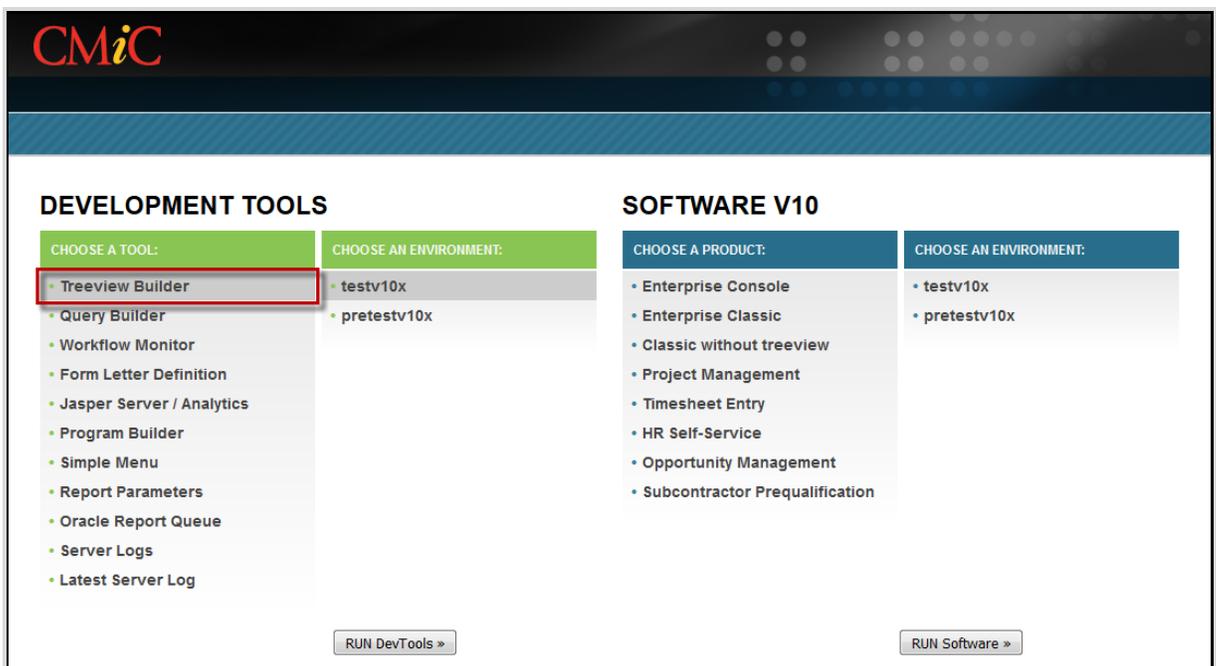
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UI Treeview Builder (ADF) – v10x Tool

Overview – UI Treeview Builder

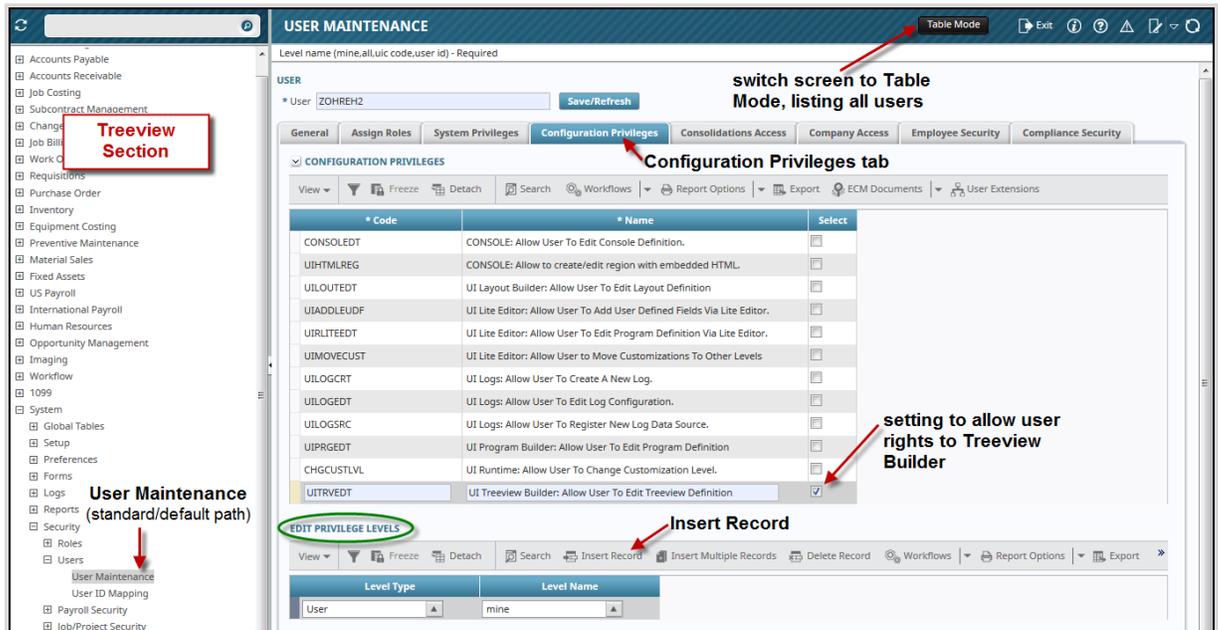


Sample screen of CMiC Enterprise's launch page: Development Tools on the left and CMiC Enterprise Software on the right.

CMiC Enterprise's Treeview Builder tool is found under the **Choose a Tool** column of the **Development Tools** section, as framed by the red rectangle in the screenshot above. Treeview Builder allows an administrator to customize the Treeview menu used to list and launch the applications of Enterprise, external URLs, and created UI Logs and Dashboards. Also, it allows Treeviews to be saved at either the User, Group, or Site Level, so that Treeviews can be customized for just one user, a group of users, or for all Enterprise users. Its functionality is similar to that of the JSP Menu Maintenance tool for JSP based applications.

Setup for UI Treeview Builder

Grant User UI Treeview Builder Privileges



For a target user to create and edit Treeviews, an administrative user with the rights to alter a user's security settings must grant the target user the relevant privileges. The screen to alter the relevant security settings is **User Maintenance** (Standard Treeview navigation: **System > Security > Users > User Maintenance**), as shown in the above screenshot.

Grant User Rights to Treeview Builder

From the **User Maintenance** screen, search for and select the target user. The security setting that grants a user rights to Treeview Builder is titled **UI Treeview Builder: Allow User To Edit Treeview Definition**, and it is found on the **Configuration Privileges** tab of the User Maintenance screen (shown in the previous screenshot). Ensure that this privilege's checkbox is checked so that the target user has rights to run the **Treeview Builder** development tool from the launch screen.

Configuration Level Rights for Treeview Builder

In the **Edit Privilege Levels** section, encircled by the green oval, click **Insert Record**. For the new row, assign the user a **Level Type** privilege and a corresponding **Level Name** privilege.

The **Level Type** field specifies the level at which the target user is able to save a customized Treeview. The following table provides details about the available **Level Type** edit privileges:

Level Type (Customization Level)	Details
User	User Level: privilege to manage Treeviews for a single User ID
UIC Group	Group Level: privilege to manage Treeviews for a UIC Group. For details about setting up UIC Groups, please refer to the following section, <i>UIC Group Maintenance</i> .
Site	Site Level: privilege to manage Treeviews for all users at the Site Level (aka System/Client Level)

The values available for the second field, **Level Name**, depend on the value selected for the **Level Type** field. The **Level Name** field specifies the User ID, Site, or UIC Group for which the target user may customize Treeviews. The following table provides details about the available **Level Name** privileges:

Level Name [Set of User(s)]	Details
mine	If User is selected for the first field, the term <i>mine</i> means “my User ID”; if Site is selected for the first field, the term <i>mine</i> means “my site”; if Group is selected for the first field, <i>mine</i> means “my group”.
<User ID>	If User is selected for the first field, User IDs are available, along with the “mine” and “all” options.
<UIC Group Code>	If Group is selected for the first field, UIC Group codes are available, along with the “mine” and “all” options.

To review, if **Level Type** is “User” and **Level Name** is “mine”, the user can customize Treeviews for themselves; and if **Level Type** is “Site” and **Level Name** is “mine”, the user can customize Treeviews for everyone at the Site Level (i.e. Client level).

UIC Group Maintenance

The screenshot displays the 'UI CONFIGURATION GROUPS' interface. It features a table with columns for Code, Name, and Description. The table lists several groups: ADMIN, HRGRP, KMGRP, QAGRP, and SAAS. A red box highlights the HRGRP row, and a red arrow points to it from the 'members of selected UIC group' section below. This section shows a list of user IDs: MIKEFER1, DENNISL, JESSICA, NATALIA, and JCRANE.

* Code	Name	Description
ADMIN	Admin	Testing Group - ADMIN
HRGRP	HR Group	HR Group
KMGRP	Keith's testing group	Used by Keith for Testing
QAGRP	QA - Testing Group	Testing Group
SAAS	SaaS Configuration	Users belonging to this group are going to se

User ID
MIKEFER1
DENNISL
JESSICA
NATALIA
JCRANE

Sample of User Interface Configuration screen; Program Name: SDUICONFIGGROUP; Standard/Default Treeview path: System > Setup > User Interface Configuration

The User Interface Configuration screen is the maintenance screen for User Interface Configuration Groups (UIC Groups). UIC Groups are used to group users for the purpose of assigning them a customized Console, a customized Treeview, or a customized screen (via Lite Editor) at the Group Level.

For instance, Human Resources personnel can be added to a UIC Group titled “HRGRP”, and when a customized Console, Treeview or screen is created for the group, the customized version would be saved at the Group Level, for the HRGRP UIC Group.

User Group – Section

The **User Group** section lists all of the created UIC Groups. For the UIC Group selected in this section, the **User Detail** section displays its members.

Add UIC Group

To add a UIC Group, click [**Insert Record**] on the **User Group** section’s Block Toolbar. For the **Code** field, provide an identifying code for the UIC Group. For the **Name** field, provide a name for the UIC Group, and for the **Description** field, provide a description for the group. Click [**Save**] to commit the addition.

Edit UIC Group Name or Description

Select the group’s row, using the section area (framed by red rectangle in previous screenshot), then edit the group’s name or description using the **Name** or **Description** fields. Click [**Save**] to commit the changes.

Delete UIC Group

Select the group’s row, using the section area (framed by red rectangle in previous screenshot), then click [**Delete Record**] on the **User Group** section’s Block Toolbar. Click [**Save**] to commit the deletion.

User Detail – Section

The **User Detail** section is used to maintain the members of the UIC Group selected under the **User Group** section.

NOTE: A user can belong to only one UIC Group at a time.

Add Member to UIC Group

To add a member to a selected UIC Group, click [**Insert Record**] on the **User Detail** section’s Block Toolbar. Select a User ID from the list of values. Click [**Save**] to commit the addition.

Delete Member from UIC Group

Select the member’s row, using the section area (framed by red rectangle in previous screenshot), then click [**Delete Record**] on the **User Detail** section’s Block Toolbar. Click [**Save**] to commit the deletion.

Treeview Builder – Screen

Loading & Saving Treeviews

Named Treeviews & Named Treeviews Set – Terminology

Please Select Menu to Edit

SELECT CUSTOMIZATION LEVEL

* Level Type Configuration Group

* Level Name HRGRP

Match All Any

Code

Description

Search Reset

Code	Description
APMENU	AP Menu
V10XPROFESSIONAL	Default Professional Menu
V10SAASSTDMENU	Enterprise v10 SaaS
IMG_V10XMENU	Imaging Menue for QA
V10XCRM	Opportunity Management Menu
V10XFORMS	v10x Default Forms Treeview Enterprise Edition
V10STDMENU	v10x Default Treeview Enterprise Edition

Note: A red arrow points from the 'List of Named Treeviews' callout box to the 'Level Name' dropdown menu.

Sample of screen to choose Treeview to load.

Named Treeviews

A Named Treeview is any Treeview that is visible and available to users. They appear in lists of Treeviews, such as the list of Treeviews available to choose from, just after the user launches UI Treeview Builder. The above screenshot shows a sample of such a list of Named Treeviews.

Named Treeviews Set

All of the Named Treeviews in the system comprise the system's Named Treeviews Set.

Load Treeview – Part 1

The first step in creating a customized version of a Treeview or in editing an existing Treeview is to load the relevant Treeview.

Load Treeview to Create Customized Variant

If Treeview Builder is launched to create a customized Treeview, the Treeview selected when you start Treeview Builder is used as the starting point (base) from which its menu items are edited, added or removed. The modified Treeview is saved as a variant version, for a user, User Interface Configuration Group (UIC Group), or everyone using Enterprise (Site Level).

Load Treeview to Edit

If Treeview Builder is launched to edit a Treeview for a user, UIC Group, or at the Site Level, the Treeview selected when Treeview Builder was launched is the Treeview that gets modified and saved.

Save Customized Treeview – [Save] vs [Save As]

UI Treeview Builder was designed to be versatile. Specifically, it allows versatility in how a company maintains its set of Named Treeviews, giving a company more choice in creating its own protocol for using Treeview Builder in a consistent manner.

One of the intended results of this versatility is that Treeview Builder allows for the simplification of a user's set of Named Treeviews (set of Treeviews made available to users for selection), which is illustrated in the following section.

System Levels & System Level Objects

When a customized Treeview is saved, it is saved at a particular Enterprise system level, for a particular system level object. The following table provides details about the system levels, their objects, and the availability of Treeviews for particular system level objects:

Enterprise System Level	Enterprise System Level Object(s)	Treeview Availability & System Level Objects
Site Level	Only 1 object at the Site Level, <i>the Site</i> , which is the Enterprise system.	A Treeview at the Site Level is tied to <i>the Site</i> , and it is available to all Enterprise users.
Group Level	UIC Groups: UIC Groups group users in order to assign them a Treeview.	A Treeview at the Group Level is tied to a particular UIC Group, and it is only available to members of the UIC Group.
User Level	User IDs	A Treeview at the User Level is tied to a particular User ID, and it is only available to the user with that User ID.

Please Select Menu to Edit

SELECT CUSTOMIZATION LEVEL

* Level Type Configuration Group **select Level (the Site, Group, or User)**

* Level Name HRGRP **select Level Object (the Site, UIC Group Code, or User ID)**

Match All Any

Code

Description

Code	Description
APMENU	AP Menu
V10XPROFESSIONAL	Default Professional Menu
V10SAASSTDMENU	Enterprise v10 SaaS
IMG_V10XMENU	Imaging Menu for QA
V10XCRM	Opportunity Management Menu
V10XFORMS	v10x Default Forms Treeview Enterprise Edition
V10STDMENU	v10x Default Treeview Enterprise Edition This Named Treeview has 6 versions:

- base version, at the **Site Level**
- 3 variant versions for 3 users, at the **User Level**
- 2 variants for 2 UIC groups, at the **Group Level**

As an example, the **V10x Default Treeview Enterprise Edition** Treeview has 5 variants of the displayed base version.

Since a Treeview is saved for a particular user, User Interface Configuration group (UIC Group), or for the Site, the user can save the customized Treeview without changing the name and overwriting the Treeview it was based on, using **[Save]** instead of **[Saves As]**. This keeps variant versions out of Treeview lists, as shown in the above screenshot. Also, this is possible because Treeviews are not only distinguished by their name, but also by the user, UIC Group, and level for which they are saved. As long as the modified Treeview is saved for a different user or UIC Group, or at a different level, using **[Save]** results in a variant being saved, without overwriting the loaded Treeview. As would be expected, if the modified Treeview is loaded and saved using the same user or UIC Group, or if it was loaded and saved at the Site Level, using **[Save]** results in the loaded Treeview being overwritten.

Example

If you log into Enterprise with a Treeview that is at the Site Level, use UI Treeview Builder to modify it, then use **[Save]** to save it at the Group Level for a particular UIC Group, the loaded Treeview at the Site Level remains unmodified and a variant is created for the particular UIC Group. Behind the scene, the system is able to distinguish between the two, and it will load the variant for members of the UIC Group, and it will load the Site Level version for all other users.

Load Treeview – Part 2: Order in Which Variants are Searched & loaded

When a user logs into Enterprise, the user selects which Named Treeview to use. The system assumes that all Named Treeviews, whether they are a base (i.e. a generic, un-customized version) or a variant of a base, potentially have variant versions. Thus, regardless of the Treeview's type, the first thing the system does is it checks if there is a variant version of the selected Treeview (with the exact name) at the User Level for the user. If none is found, the system then checks if there is a version of the selected Treeview at the Group Level, for the user's UIC Group. If none is found again, the system uses the selected Treeview.

The first customized version the system encounters, in this order, is the version loaded for the user, and if no customized version is found, the Treeview loaded is a Site Level Treeview. The system does not check if there

is a version of the selected Treeview at the Site Level, since all users have access to Treeviews saved at the Site Level.

NOTE: The following two suggested protocols are intended to give you an idea of a consistent protocol your company could establish to maintain its set of Named Treeviews. They may be adopted, or your company could choose to create its own protocol that is a combination of the two.

Suggested Protocol 1: Keep Variants Out of Named Treeviews Set

This suggested protocol for creating Treeviews can be used by administrators that wish to have a smaller, neater set of Named Treeviews, to simplify the choosing of Treeviews by users by not providing them with various variant versions of Treeviews. Such a simplified set of Named Treeviews would only contain Treeviews that are bases, and only these base Treeviews are available to users. Variants are kept out of the set of Named Treeviews, and the system automatically determines which Treeview to use for a user.

Create Variant

To save a customized version of a loaded Treeview, without adding the variant to the set of Named Treeviews, use [**Save**] instead of [**Saves As**]. As expected, since the modified Treeview is not saved with a new name, it will not be in the set of Named Treeviews. The loaded Treeview remains unmodified, and a variant is created for the particular UIC Group. Behind the scene, the system is able to distinguish between the two. When a user logs in, if the system finds a customized version for the user, it will load the customized version, otherwise it will load the base version.

NOTE: Due to the order in which variants are searched and loaded, explained in the preceding *Load Treeview – Part 2* section, if variants of a particular Named Treeview exist for a user at the User Level and at the Group Level, only the User Level version is ever loaded, since User Level variants are searched for first and the first variant found is loaded. Thus, for each Named Treeview, a user can have either a User Level variant or a Group Level variant, but not both.

Create New Named Treeview (New Base)

If a new Named Treeview is required in the set of Named Treeviews as a base (i.e. generic versions), use [**Save As**] to save the customized Treeview with a new name. As expected, since the Treeview is saved with a new name, it becomes a Named Treeview.

Edit Treeview – Base or Variant

To edit a Named Treeview or a variant for a UIC Group or the Site, load the Treeview for the relevant system level object (UIC Group or the Site). For details about how to ensure that the correct Treeview is loaded, please refer to the *Load Treeview – Part 3* section.

When saving the modified Treeview, save it for the same system level object using [**Save**]. The result is that the loaded Treeview is overwritten with the modified version.

Suggested Protocol 2: Keep Variants in Named Treeviews Set

If administrators wishes to keep variants in the set of Named Treeviews, along with the base versions, use [**Save As**] instead of [**Save**] to save new variant Treeviews with a different name. As expected, since the variant is saved with a new name, it becomes a Named Treeview, completely detached from the Treeview on which it was based. To distinguish between the base and variant versions, include the system level object's name for which the variant was saved.

To summarize, if this option is used, the set of Named Treeviews will contain the base Treeviews and all of their variants, and the name used to save them is used to distinguish them. Since variants are in the set of Named Treeviews, variants are also Named Treeviews.

Create New Named Treeview – Base or Variant

To create a new Named Treeview, based on the loaded Treeview, use [**Save As**] to save the modified Treeview with a new name. As part of the name, specify the system level object (UIC Group, or the Site) for which it was created. Since the Treeview is saved with a new name, it becomes a Named Treeview, visible to the users for which it was saved.

Edit Treeview – Base or Variant

To edit a Named Treeview or a variant for a UIC Group or the Site, load the Treeview for the relevant system level object (UIC Group or the Site).

When saving the modified Treeview, saved it for the same system level object using [**Save**]. The result is that the loaded Treeview is overwritten with the modified version.

NOTE: Due to the order in which variants are searched and loaded, explained in the preceding *Load Treeview – Part 2* section, if variants of a particular Named Treeview exist for a user at the User Level and at the Group Level, only the User Level version is ever loaded, since User Level variants are searched for first, and the first variant found is the one that gets loaded. Thus, for each Named Treeview, a user can have either a User Level variant or a Group Level variant, but not both.

Customizing Treeviews for UIC Groups as Administrator

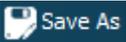
In order for an administrator to be able to save a customized Treeview for a UIC Group or to load a UIC Group's Treeview for the purpose of customizing it, the administrator must belong to that UIC Group.

A user can only belong to one UIC Group at a time, so, if the administrator belongs to a different UIC Group, the first step is to remove the administrator from that UIC Group. With the administrator not belonging to any UIC Group, add the administrator to the UIC Group for which the Treeview is to be modified.

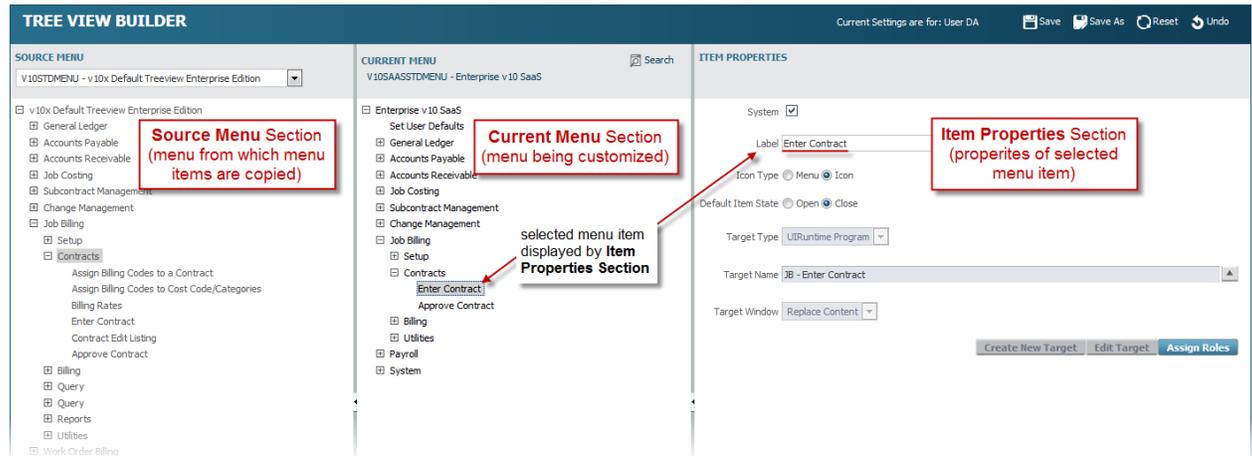
After the administrator saves the modified Treeview, the administrator can be removed from the UIC Group for which the Treeview was modified, and added back to their actual UIC Group.

Main Toolbar Menu Options

The following are details about the screen's Main Toolbar options:

Menu Option	Description
 Save	Saves the modified Treeview using the same name, for the same system level (User, Group, or the Site,) and system level object (User ID, UIC Group, the Site). Please refer to the <i>Loading & Saving Treeviews</i> section for details about saving Treeviews
 Save As	Saves the modified Treeview with a new name, for a selected system level and system level object. Please refer to the <i>Loading & Saving Treeviews</i> section for details about saving Treeviews.
 Reset	Resets the current Treeview, which is a variant of its base version, to its base version.
 Undo	Clears all unsaved changes done to the current Treeview.

Treeview Builder Sections



The Treeview Builder screen is comprised of three sections, the first two sections display Treeviews, and the third displays a selected menu item's properties.

Source Menu – Section

The first section, **Source Menu**, contains a Treeview selected through the section's drop-down list. The Treeview in this section is used to copy menu items from in order to paste them into the Treeview being customized in the **Current Menu** section. The menus available in the **Source Menu** section are all base Treeviews. In other words, customized versions of base Treeviews, which are not Named Treeviews, are not available in this section.

Current Menu – Section

The **Current Menu** section contains the Treeview being configured. It can be a base Treeview or a customized Treeview for a user or a UIC Group. For details about how to load the relevant Treeview for configuring, please refer to the previous *Loading & Saving Treeviews* section.

Item Properties – Section

ITEM PROPERTIES

System

Label

Icon Type Menu Icon

Default Item State Open Close

Target Type

Target Name

Target Window

The **Item Properties** section displays a selected Treeview menu item’s properties. When a new menu item is created for a Treeview, this section is used to configure the new menu item. Menu items are either links to launch a target specified by a Target object, or they are expandable and collapsible nodes that can contain other nodes and links.

The following table provides details about the fields in this section:

Field	Description
System	This is a display-only flag that indicates if the menu item is standard (comes with Enterprise), or if it was created by a user.
Label	Label for the Treeview menu item.
Icon Type	Select Icon type: Menu or Icon.
Default Item State	Select the items default state: Open or Closed.
Target Type	This field contains a list of all of the Target types. For the type selected through this field, the Target Name field will list all Targets of that type, including Targets created by users for UI Logs or Dashboard.
Target Name	For the type selected through the Target Type field, this field lists all Targets of that type, including Targets created by users for UI Logs or Dashboard.
Target Window	This field specifies how a Target gets displayed. If Replace Content is selected, the Target will be displayed using the same browser’s tab, if New Window is selected, the Target will be displayed on a new browser tab.

[Create New Target], [Edit Target] – Buttons

Since menu items can be links to launch targets, if you want a menu item to launch a newly created UI Log or Dashboard, a Target object must first be created for the new UI Log or Dashboard. Once the Target is created, it can be assigned to a menu item through the **Target Name** field.

The **[Create New Target]** button launches the screen used to create new Target objects, and the **[Edit Target]** button is used to edit Target objects.

For details about creating a new Target, please refer to the following subsection: *Configure Treeview > Create New Target*.

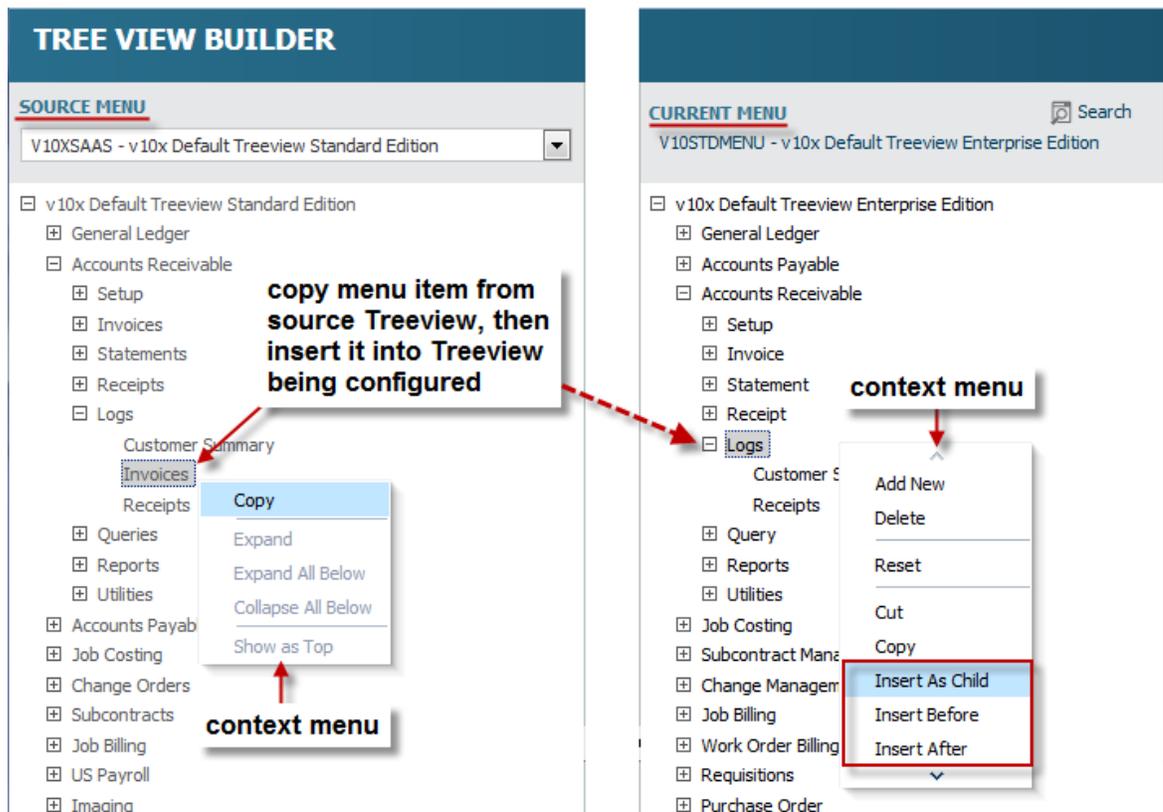
[Assign Roles] – Button

The [Assign Roles] button is used to assign a Security Role (standard/default path: **System > Security > Roles > Define Roles**) to a menu item. If Security Roles are assigned to a menu item, the menu item will only be available to members of the Security Roles.

Configure Treeview

NOTE: When new menu items are added to upper-level Treeviews (base version), the customized versions of the Treeviews will not automatically include the new items. The new menu items would have to be added to the outdated customized version. Same goes when items are removed from upper-level (base) Treeviews.

Copy Menu Item from Source to Current Treeview



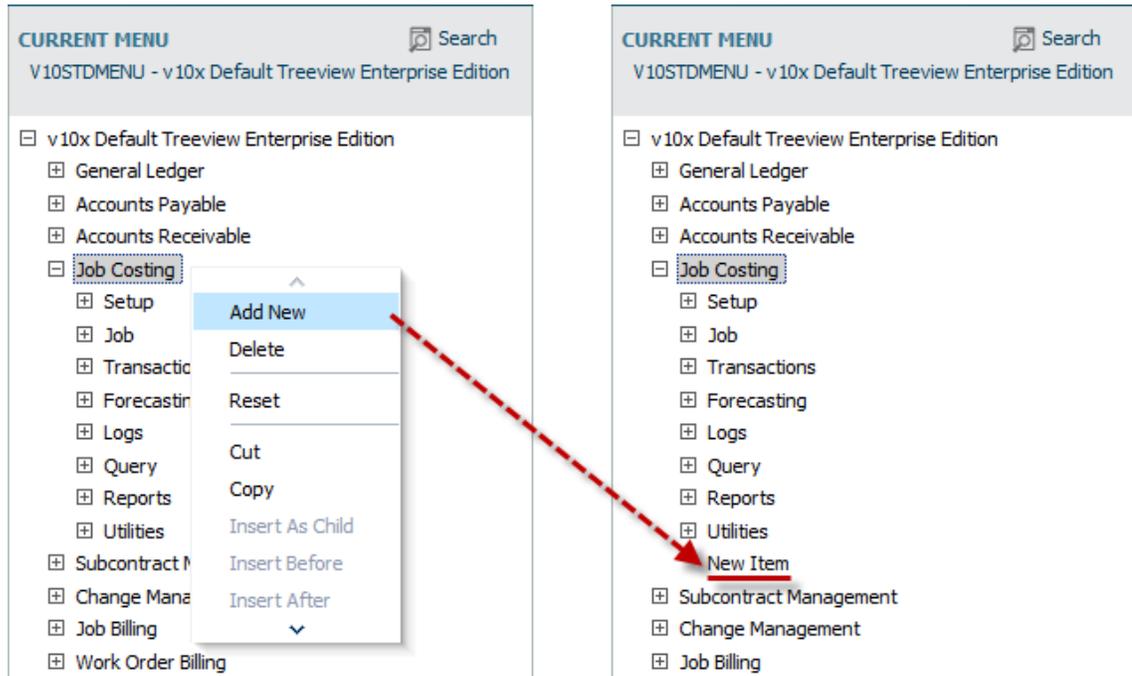
One of the ways to add a menu item to the Treeview being configured is to copy a menu item from the Treeview under the **Source Menu** section, and then inserting it into the Treeview under the **Current Menu** section.

To copy a menu item, left-click the desired menu item to bring up the context menu and select **Copy**. To insert the copied menu item, left-click the appropriate menu item on the Treeview being configured, using the following details about the insert options as a guide:

Insert Option	Description
---------------	-------------

- Insert As Child** Inserts copied item as a child of the selected node.
- Insert Before** Inserts copied item before the selected item.
- Insert After** Inserts copied item after the selected item.

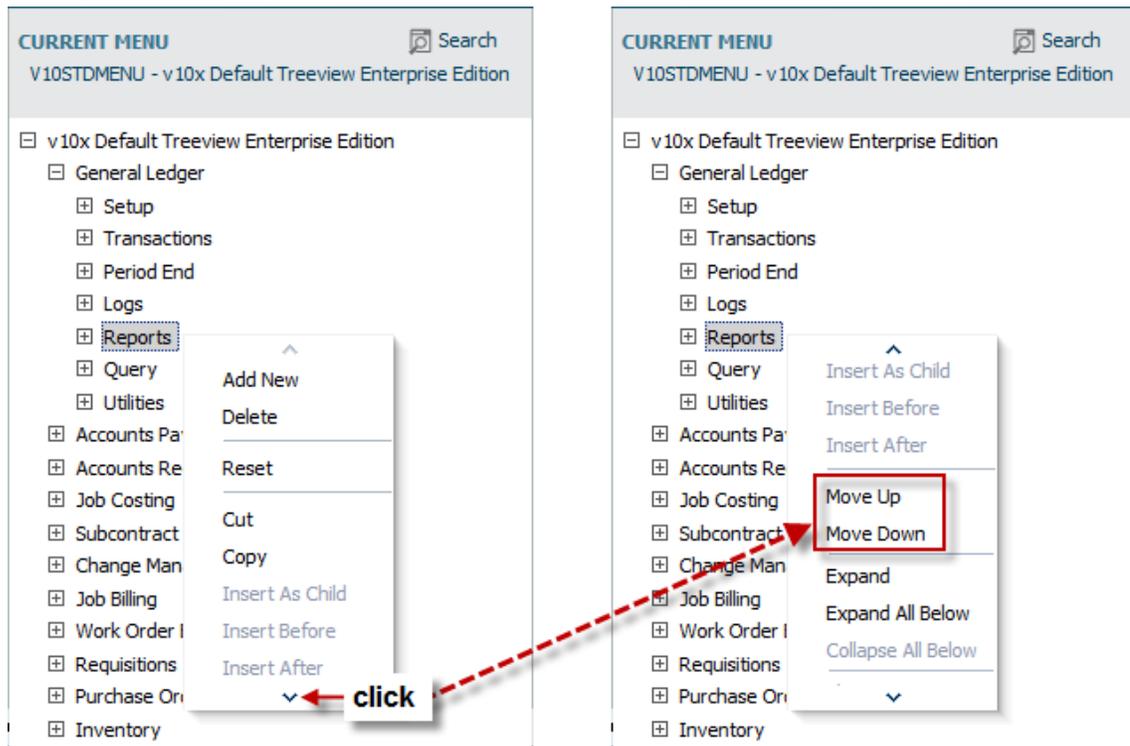
Add New Menu Item to Treeview



To add a new menu item to the Treeview being configured, left-click the node to contain the new menu item to bring up the context menu and select **Add New**. A new menu item will be added to the selected node, as shown in the above-right screenshot.

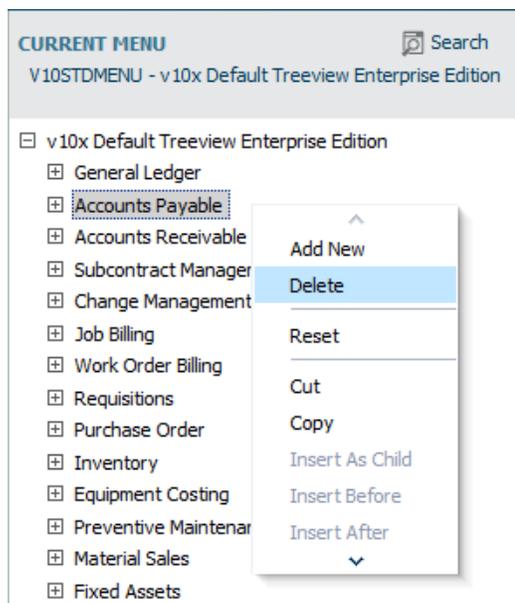
Next, select the new menu item, and use the **Item Properties** section to configure the new menu item. For details about the **Item Properties** section, refer to the previous section, *Item Properties – Section*.

Move Menu Item Up or Down



To move a menu item up or down the menu, left-click the menu item to bring up the context menu, then click the down-arrow at the bottom of the context menu until the **Move Up** and **Move Down** options are shown. Use the moving options as required.

Delete Menu Item



Left-click the menu item to delete, then select **Delete** from the context menu.

Create New Target

ITEM PROPERTIES

System

Label

Icon Type Menu Icon

Default Item Open Close
State

Target Type

Target Name

Target Window

click to creat new target → [Create New Target](#) [Edit Target](#) [Assign Roles](#)

The [**Create New Target**] button, found in the **Item Properties** section of Tree View Builder, brings up the Create/Edit Target screen to create a new Target. Once the Target is created, it is available in the **Target Name** field's list of values (framed in red above).

Sample of the Create/Edit Target screen used to create new Targets to launch programs like custom UI Logs & Dashboards.

In the Create/Edit Target screen, the values available for the **Called Unit** LOV are of the type specified by the **Type** field.

If the **Target Type** is **External URL**, the **External URL** field is used to specify a URL for an online target.

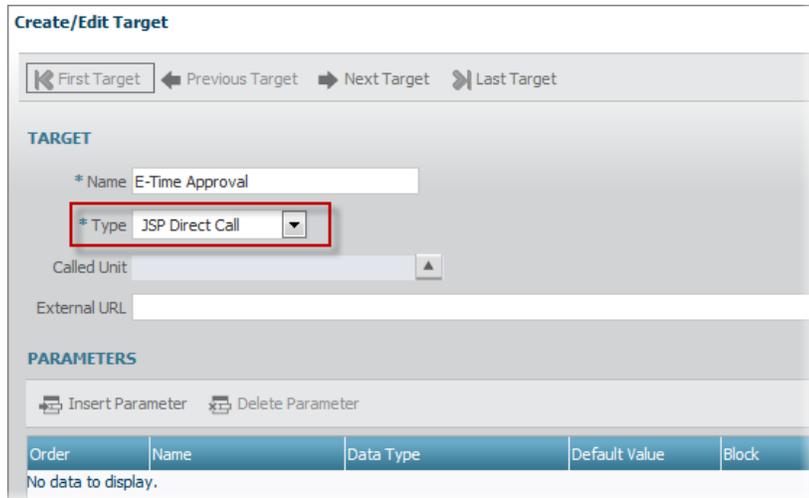
The **Parameters** section is used to provide parameters for the target, if the target requires input parameters in order to be launched. To provide a target parameter, click [**Insert Parameter**] and use the new row to detail it. Refer to the following table for details about the fields in this section:

Field	Description
Order	Specifies the order that the parameters are supplied to the target.
Name	Name for parameter entry.
Data Type	The parameter's data type (Date, Number, Varchar2).
Default Value	This field is an alternative to using the Field field; it can be used to provide a literal value for the selected input parameter.
Block	If a Target's screen's fields are broken into screen blocks (sections), this field lists the blocks. The block chosen here has its fields listed by the Field field.
Field	This is the field (column value), on the same row as the hyperlink, that will supply the value for the selected target parameter. The fields displayed in this LOV are dependent on the Block field. If this field is used, the Default Value is not used.

Using Relative URLs Instead of Hardcoded URLs

Using external targets with hardcoded URLs leads to problems when databases are cloned between environments. To avoid these problems, relative URLs can be used instead.

JSP Program Launched via Relative URLs



Create/Edit Target

First Target Previous Target Next Target Last Target

TARGET

* Name E-Time Approval

* Type JSP Direct Call

Called Unit

External URL

PARAMETERS

Insert Parameter Delete Parameter

Order	Name	Data Type	Default Value	Block
No data to display.				

Instead of setting the Target's type as **External URL**, with URLs such as the following:

`http://sample.cmic.com/prod/PyEtimeAppr/`

`http://sample.cmic.com/prod/SdMenu/?appCode=COLLAB`

`http://sample.cmic.com/prod/ImgMgr/imgMgrStart.do`

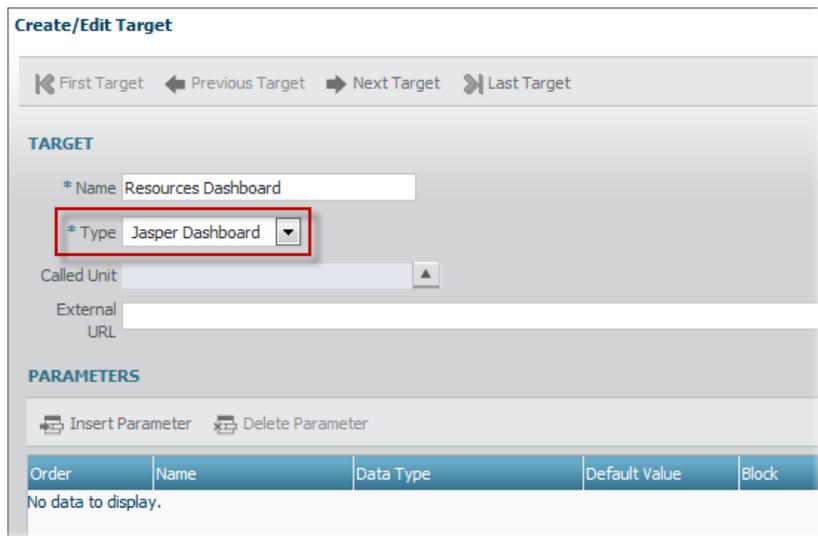
Set the Target type to **JSP Direct Call** (as shown above), and use relative URLs like:

`/PyEtimeAppr/`

`/SdMenu/?appCode=COLLAB`

`/ImgMgr/imgMgrStart.do`

Dashboards Launched via Relative URLs



Create/Edit Target

First Target Previous Target Next Target Last Target

TARGET

* Name Resources Dashboard

* Type Jasper Dashboard

Called Unit

External URL

PARAMETERS

Insert Parameter Delete Parameter

Order	Name	Data Type	Default Value	Block
No data to display.				

Instead of setting the Target's type as **External URL**, with a URL such as the following:

```
http://sample.cmic.com/prod/jasperserver-  
pro/flow.html?_flowId=dashboardRuntimeFlow&dashboardResource=%2FCMiC_Dashboards%2FJB_D  
ashboard&viewAsDashboardFrame=true
```

Set the Target type to **Jasper Dashboard** (as shown above), and use relative URLs like:

```
/CMiC_Dashboards/JB_Dashboard
```

```
/CMiC_Analytics/Project_Management/Safety_Issues_Dashboard
```

ADF Static Programs Launched via Relative URLs

ITEM PROPERTIES

System

Label

Icon Type Menu Icon

Default Item State Open Close

Target Type

Target Name

Target Window

[Create New Target](#) [Edit Target](#) [Assign Roles](#)

If a desired standard ADF Static program is not available in the **Target Name** field's LOV, click the **[Create New Target]** button to create a Target for it.

Create/Edit Target

First Target Previous Target Next Target Last Target

TARGET

* Name

* Type

Called Unit

External URL

PARAMETERS

[Insert Parameter](#) [Delete Parameter](#)

Order	Name	Data Type	Default Value	Block
No data to display.				

To create a new Target for an ADF Static program, such as Resource Planner, using a relative URL, set the **Type** field to **Static ADF**, as shown above. For the **External URL** field, enter the relative URL, such as:

```
../RpResourcePlanner/faces/main.jsf?initialPage=summaryPage
```

Relative URLs with First Part of URL Matching Server & Environment Where Program Runs

Instead of using the **External URL** type with full URLs such as:

http://sample.cmic.com/prod/jasperserver-pro/flow.html?_flowId=homeFlow

http://sample.cmic.com/prod/jasperserver-pro/flow.html?_flowId=viewAdhocReportFlow&clientKey=1608296072121&reportUnit=/test/SOLUTIONS/Bill_G/BG_Opportunities_by_Employee&decorate=no

http://sample.cmic.com/prod/jasperserver-pro/reportGenerator.html?action=displayTempReportUnit&advUri=%2Ftest%2FSOLUTIONS%2FPY_Employment_History_Query&template=&generator=&exportFormat=html&decorate=no

Use the **Static ADF** type, and use relative URLs like:

/jasperserver-pro/flow.html?_flowId=homeFlow

/jasperserver-pro/flow.html?_flowId=viewAdhocReportFlow&clientKey=1608296072121&reportUnit=/test/SOLUTIONS/Bill_G/BG_Opportunities_by_Employee&decorate=no

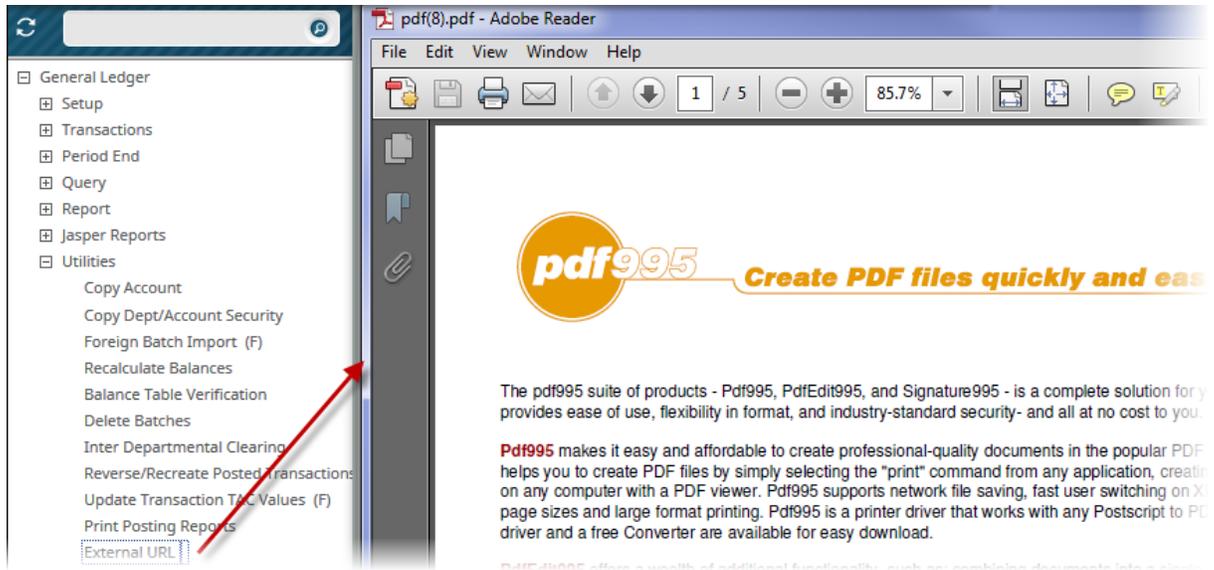
/jasperserver-pro/reportGenerator.html?action=displayTempReportUnit&advUri=%2Ftest%2FSOLUTIONS%2FPY_Employment_History_Query&template=&generator=&exportFormat=html&decorate=no

Link Menu Items to Targets

Link to External URL

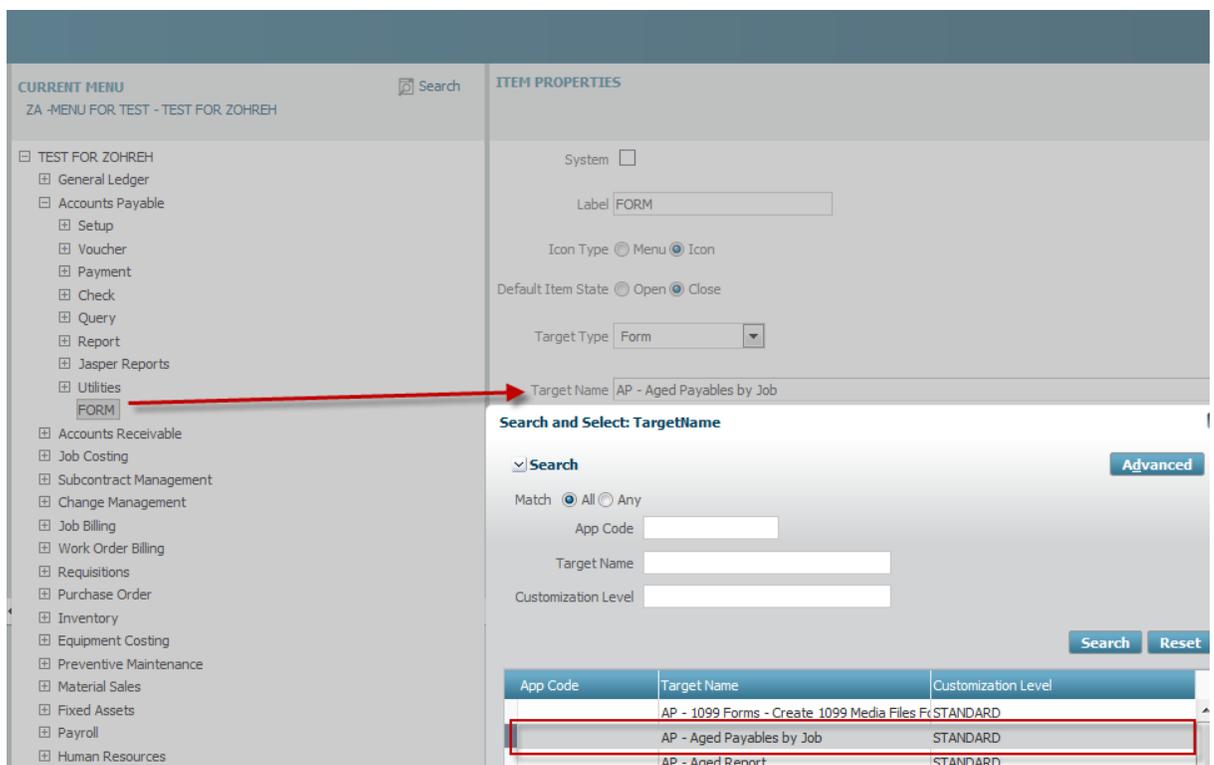
The screenshot shows the Treeview Builder interface. On the left, the 'CURRENT MENU' pane shows a tree structure with 'ZA -MENU FOR TEST - TEST FOR ZOHREH' highlighted. On the right, the 'ITEM PROPERTIES' pane shows configuration for the selected item, including 'Label: External URL', 'Icon Type: Icon', and 'Default Item State: Close'. The 'Target Type' dropdown is set to 'External URL'. A red arrow points from the 'External URL' option in the 'CURRENT MENU' pane to the 'Target Type' dropdown. A 'Search and Select: TargetName' dialog box is open, showing a search interface with fields for 'App Code', 'Target Name', and 'Customization Level'. The search results table is as follows:

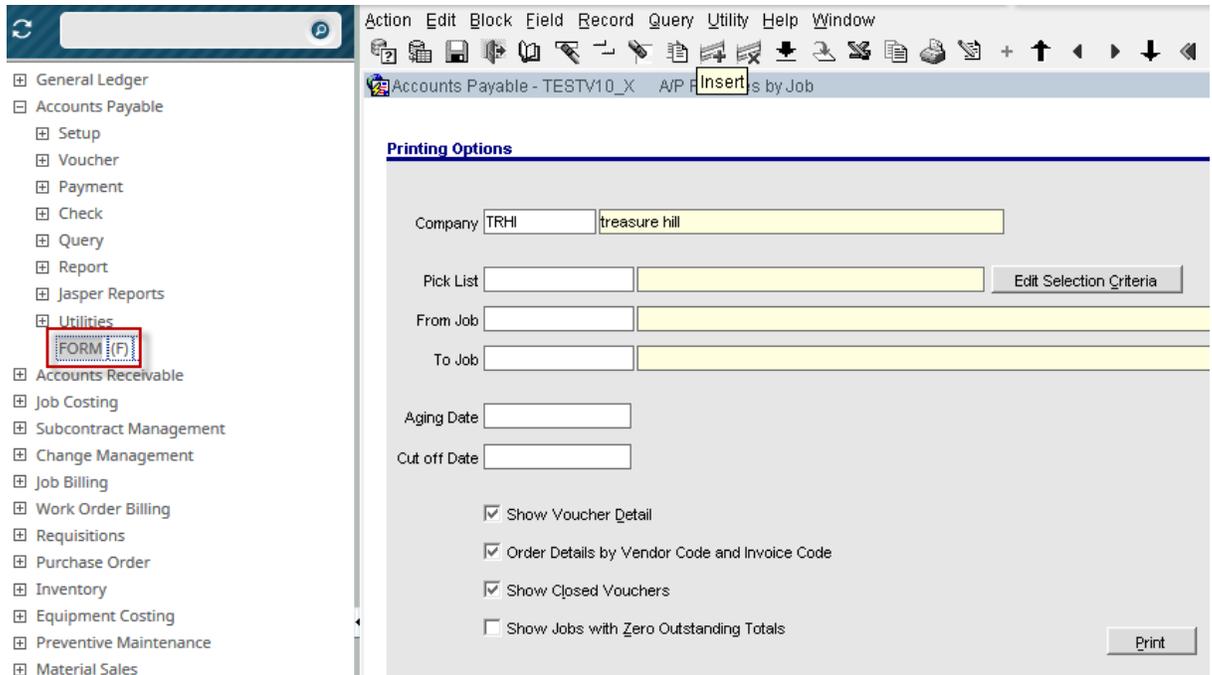
App Code	Target Name	Customization Level
	AP Executive Query	CLIENT
	EXTERNAL URL	UIC
	PM - Communications Detail	STANDARD
	SYS - Customer Support	STANDARD
	SYS - xProjects Dashboard	STANDARD
	google	UIC
	pdf-2	UIC



Sample of an External URL opened through a configured Treeview's menu item.

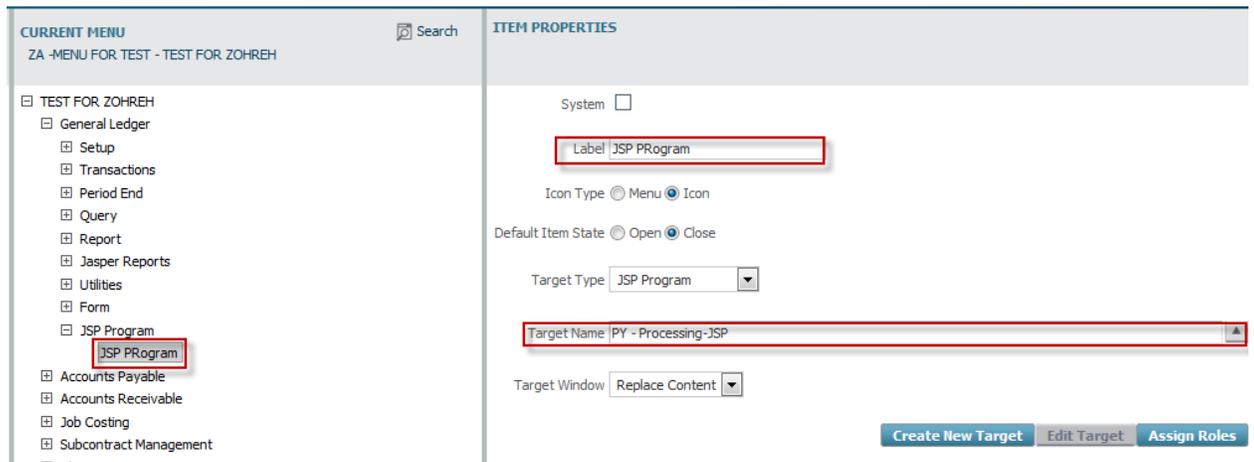
Link to Form





Sample of a Form opened through a configured Treeview's menu item.

Link to JSP Program



Payroll Processing

Payroll Company [dropdown] [button]

Home Company [dropdown] [button]

Pay Run [dropdown] [button]

Pay Year [text]

Period [text]

Check Location [dropdown] [button]

From Pay Group [dropdown] [button]

To Pay Group [dropdown] [button]

Employee Pick List [dropdown] [button]

From Employee [dropdown] [button]

To Employee [dropdown] [button]

Restart From Employee [dropdown] [button]

Include Employees Who Have No Timesheets

Internal Process (System will use external process by default if not checked)

Process

- [-] General Ledger
 - [+] Setup
 - [+] Transactions
 - [+] Period End
 - [+] Query
 - [+] Report
 - [+] Jasper Reports
 - [+] Utilities
 - [+] Form
 - [+] JSP Program**
 - [+] Accounts Payable
 - [+] Accounts Receivable
 - [+] Job Costing
 - [+] Subcontract Management
 - [+] Change Management
 - [+] Job Billing
 - [+] Work Order Billing

Sample of a JSP Program opened through a configured Treeview's menu item.

Link to JSP Log

CURRENT MENU
V10STDMENU - CMIC Default Menu Enterprise Edition

- Subcontract Management
- Change Management
- Job Billing
- Work Order Billing
- Requisitions
- Purchase Order
- Inventory
- Equipment Costing
- Preventive Maintenance
- Material Sales
- Fixed Assets
- US Payroll
- International Payroll
- Human Resources
- Opportunity Management
 - Calendar
 - Outlook Import Export
 - Organizations
 - Opportunities
 - Contacts
 - My Action Items
 - Projects
 - Proposal Workspace
 - Proposal Maintenance
 - Opportunity Forecasting
- Setup
- Reports
- PM JSP Logs
 - Subcontractors Tracking**
- Imaging
- Workflow
- 1099
- System

ITEM PROPERTIES

System

Label Subcontractors Tracking

Icon Type Menu Icon

Default Item Open Close State

Target Type JSP Log

Target Name PM - Subcontractor Tracking Log

Target Called Name PMSCTRACK

Target Window Replace Content

Target created via [Create New Target]

Create New Target Edit Target Assign Roles

This Target Type is used to add a link to a JSP Log, such as a newly created custom JSP Log, to a Treeview that would be available via the Console v10x Tool.

NOTE: To add a link to a JSP Log to the PM-JSP module's Treeview, use the Menu Maintenance screen in the PM-JSP module (standard Treeview path: **File Maintenance > Menu Maintenance**)

Menu Builder

Save As Default Reset Default Menu Copy From Project Save Reset

Project Management Menu

Project: LG Project (LGPROJ1)

- Communication Management
- Document Management
- Subcontractor Prequalification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Local Tables
- BM 360 Maintenance
- Menu Maintenance**
- Enterprise PM
 - Project System Options
 - Project Control
 - Project Maintenance
 - Activities
 - User-Defined Log Types
 - User-Defined Logs
- Log Builder

Default Menu (Custom)

- Collaboration Manager
- Communication Management
- Document Management
- Subcontractor Prequalification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security

Current Project Menu (Custom)

- Collaboration Manager
- Communication Management
- Document Management
- Subcontractor Prequalification
 - Subcontractors
 - Applicants
 - Self Service
 - Subcontractor Rating Setup
 - Prequalifications Control
 - Workflow Notification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
 - Kim's Log**
 - Kim test 3
 - Bid Package Log
 - Kim's Test4

Item Properties

System

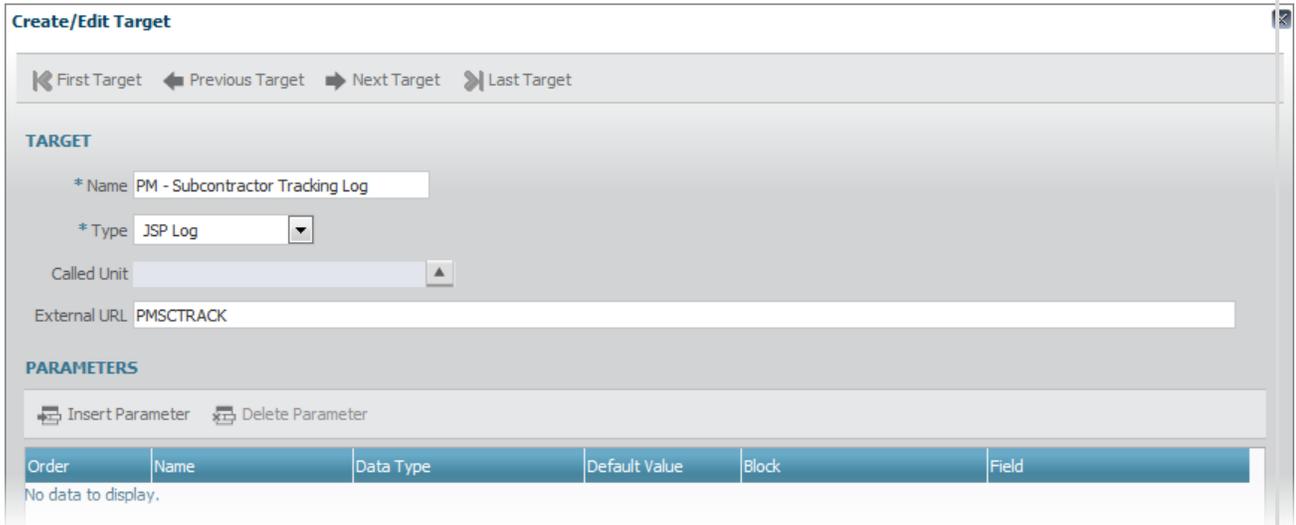
Type URL Form Log Discoverer Jasper Report Document Folder UI Runtime Program

Value 114763

Icon Type Folder Document

Target Content Frame New Window

To add a link to a JSP Log to the selected Treeview in the **CURRENT MENU** pane, create a new Target for it using the [**Create New Target**] button.



Create/Edit Target

◀ First Target ◀ Previous Target ▶ Next Target ▶ Last Target

TARGET

* Name: PM - Subcontractor Tracking Log

* Type: JSP Log

Called Unit: [dropdown]

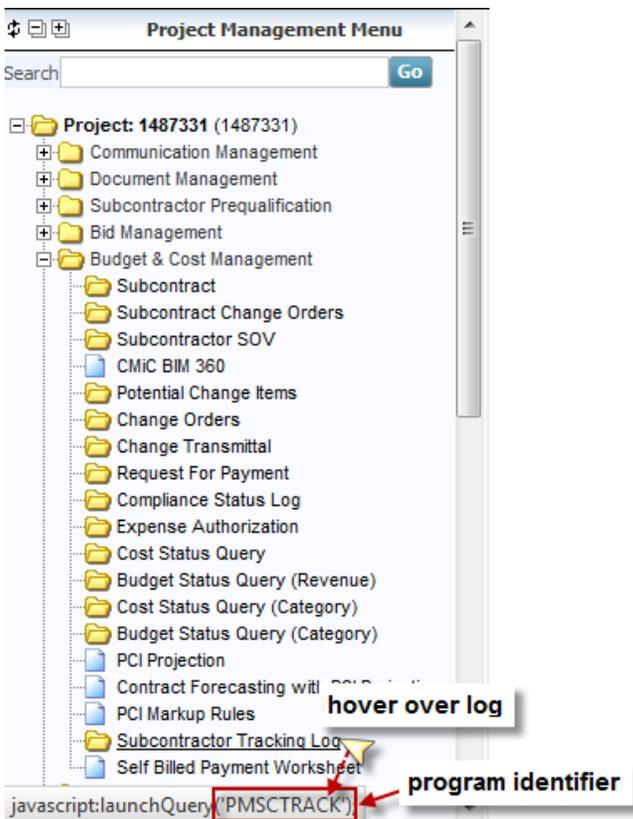
External URL: PMSCTRACK

PARAMETERS

Insert Parameter Delete Parameter

Order	Name	Data Type	Default Value	Block	Field
No data to display.					

For the **External URL** field, enter the program identifier, which is found by hovering the cursor over the log, as shown below:



Project Management Menu

Search [input] **Go**

- Project: 1487331 (1487331)
 - Communication Management
 - Document Management
 - Subcontractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Subcontract
 - Subcontract Change Orders
 - Subcontractor SOV
 - CMiC BIM 360
 - Potential Change Items
 - Change Orders
 - Change Transmittal
 - Request For Payment
 - Compliance Status Log
 - Expense Authorization
 - Cost Status Query
 - Budget Status Query (Revenue)
 - Cost Status Query (Category)
 - Budget Status Query (Category)
 - PCI Projection
 - Contract Forecasting with [unclear]
 - PCI Markup Rules
 - Subcontractor Tracking Log
 - Self Billed Payment Worksheet

hover over log

program identifier

javascript:launchQuery("PMSCTRACK")

Link to UI Runtime Program

The screenshot shows the configuration interface for a menu item. On the left, the 'CURRENT MENU' panel displays a tree view of the application structure. The 'Employee History' item is selected and highlighted with a red box. On the right, the 'ITEM PROPERTIES' panel shows configuration options for the selected item. The 'Target Type' is set to 'UIRuntime Program' and the 'Target Name' is 'PY - Employment History', both highlighted with red boxes. Other visible options include 'System', 'Label' (Employee History), 'Icon Type' (Menu/Icon), 'Default Item State' (Open/Close), and 'Target Window' (Replace Content). Buttons for 'Create New Target' and 'Edit Target' are located at the bottom right.

The screenshot shows the 'EMPLOYEE HISTORY' UI Runtime Program. The left sidebar contains the same menu tree as the previous image, with 'Employee History' highlighted. The main content area features a 'SELECTION CRITERIA' section with input fields for 'Employee', '* Action' (set to 'Change'), 'Effective Date', and a 'Current Date' field. Below this is a navigation bar with 'Search', 'Insert Record', 'Delete Record', and 'Previous Record' buttons. A tabbed interface is visible with tabs for 'Personal', 'Company', 'Rates/Salary', 'Address', and 'Tax'. The 'Personal' tab is active, displaying fields for 'Reason Code', 'Last Name', 'Prefix', 'SSN /SIN no.', 'Status Code', 'Work Status', '* FLSA Type', 'Unionized' (checkbox), 'Union', and 'Union Mem. No.'.

Sample of a UI Runtime Program opened through a configured Treeview's menu item.

Add New Treeview to Enterprise Console – Quick Guide

Overview – Add New Treeview to Enterprise Console

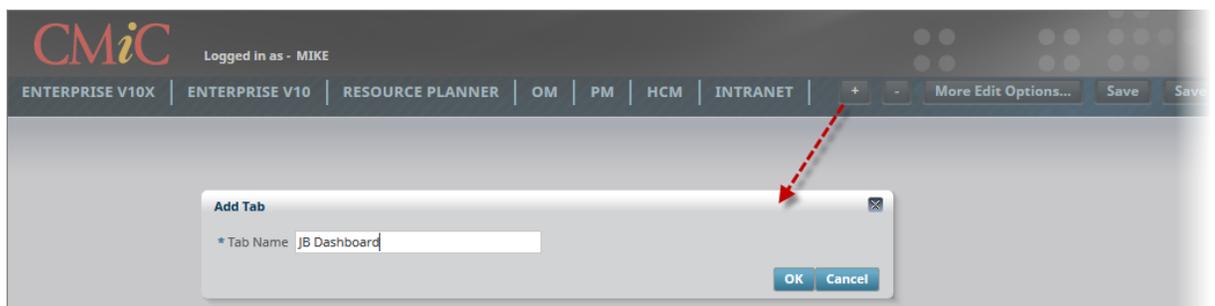
The following is an overview of the steps required to add a new Treeview to the Enterprise Console.

To add a new Treeview to the Enterprise Console, the Console v10x Tool is used. For further details about the Console v10x Tool, please refer to the *V10xTOOLS – Console.doc* user guide.

Step 1: Add New Tab

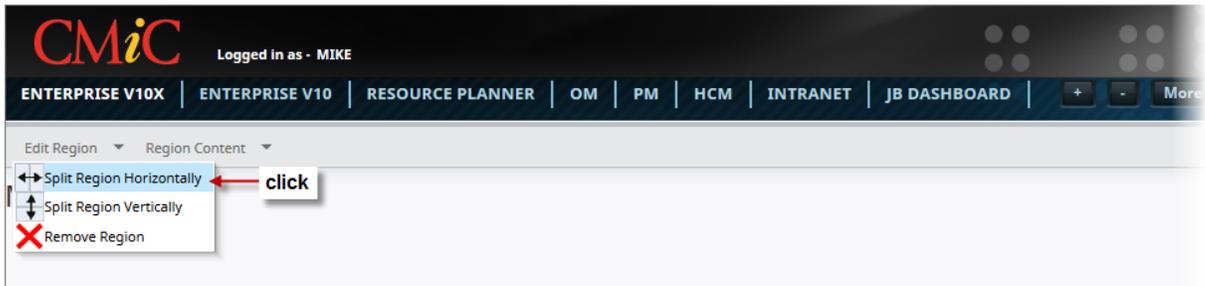


As shown above, click the **[Edit Mode]** button to switch the Console to Edit mode.



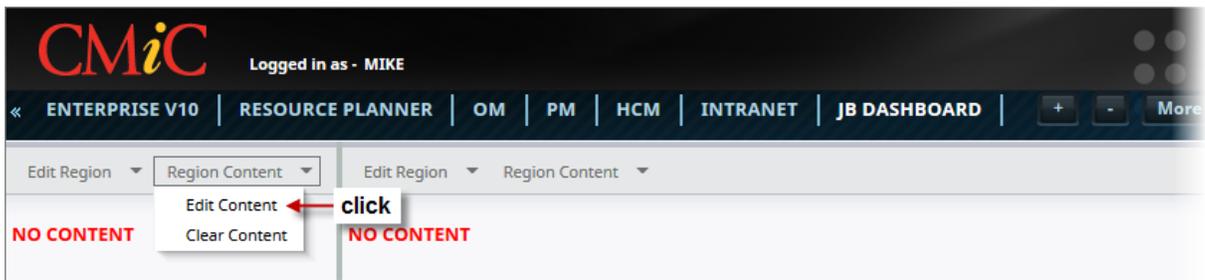
With the Console in Edit mode, click the **[+]** button, as shown above, and a pop-up will ask you to name the new tab.

Step 2: Split Region

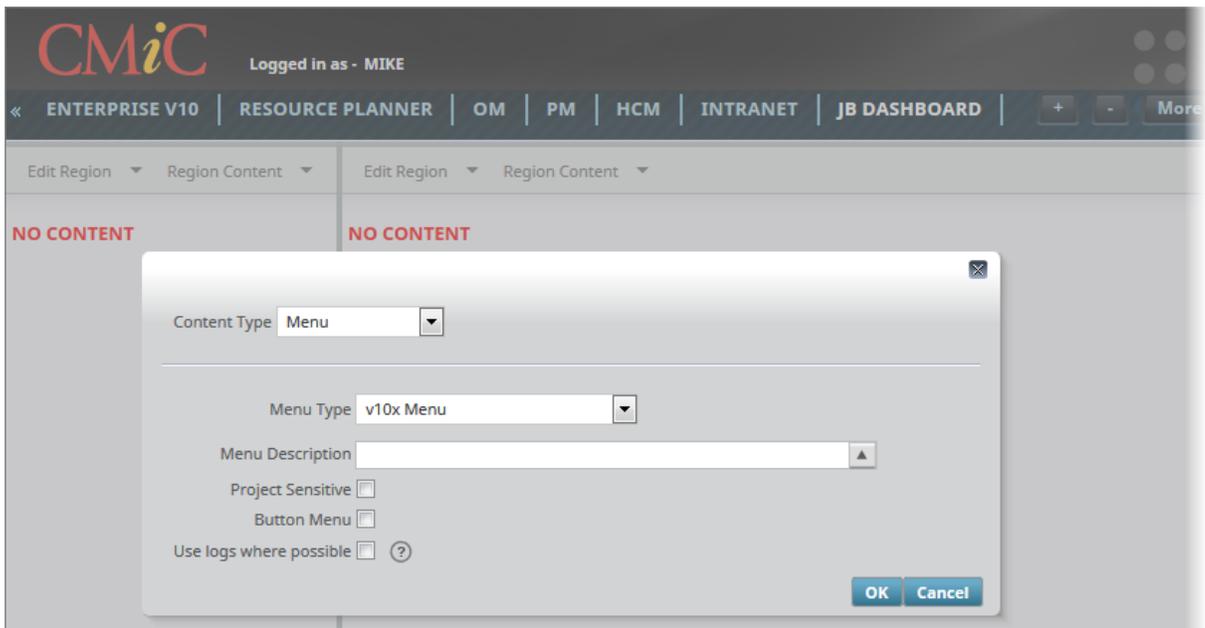


Two regions are required: one for the Treeview, and one to display the screen launched using the Treeview. To split the region, click the [Edit Region] button, then click **Split Region Horizontally**.

Step 3: Add Treeview Menu to Region



Next, in the first region, click [Region Content], then click **Edit Content**, and the following popup appears.

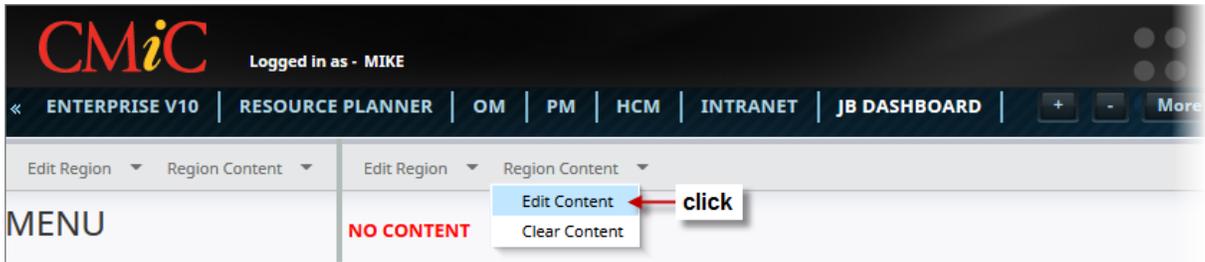


For the **Content Type** field, select “Menu”, which causes the **Menu Type** field to appear.

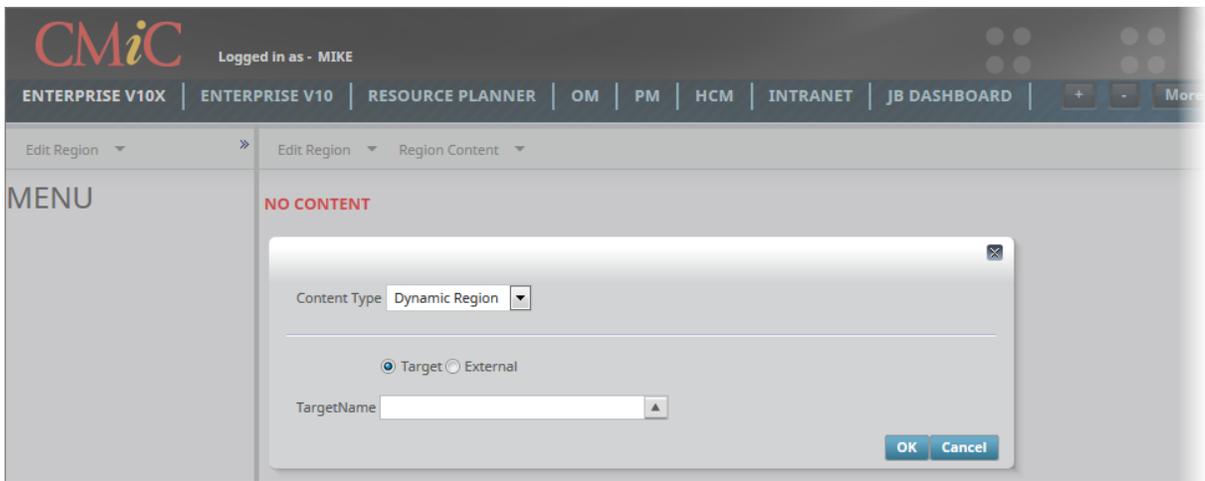
For the **Menu Type** field, select the type of Treeview. The “v10x Menu” type is for ADF Treeviews, and the “v10 Menu” type is for Forms Treeviews.

For the **Menu Description** field, select the desired Treeview, then click **[OK]**.

Step 4: Set Second Region to Dynamic Display Region

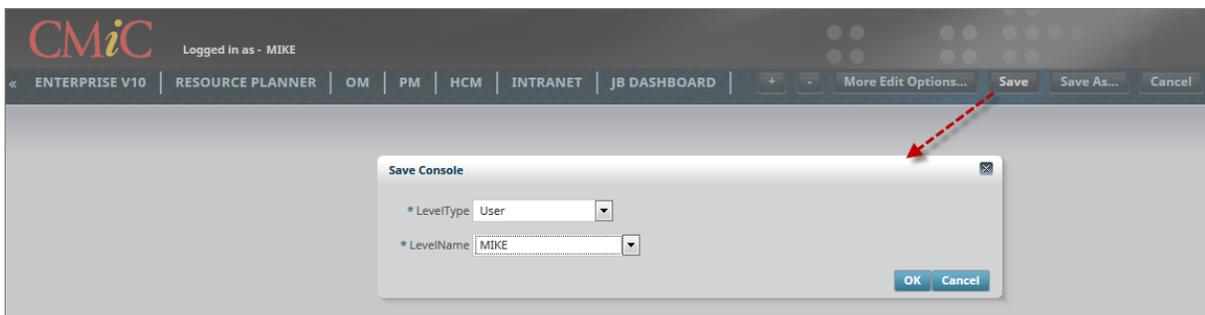


To create a Dynamic Display region for the Treeview, in the second region, click **[Region Content]**, then click **Edit Content**.



For the Content Type field, shown above, select **“Dynamic Region”**, then click **[OK]**.

Step 4: Save New Console Tab

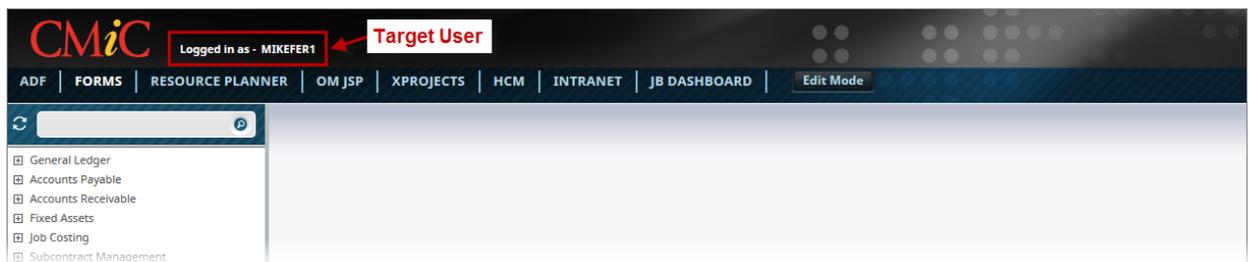


Finally, click **[Save]**, and in the popup (shown above), select the relevant **Level Type** and **Level Name**, and then click **[OK]**.

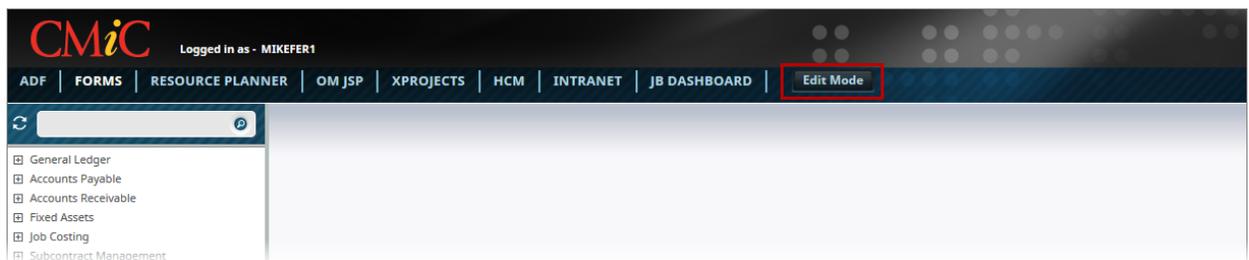
Appendix

How To Determine User's Treeview

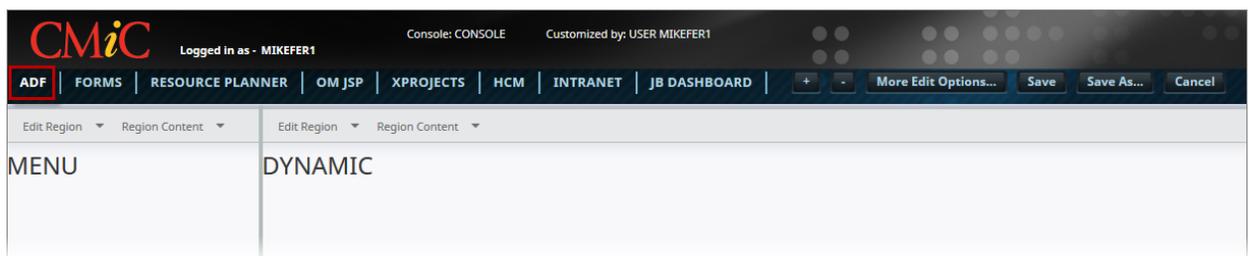
Step 1: Load CMiC's Software for Target User



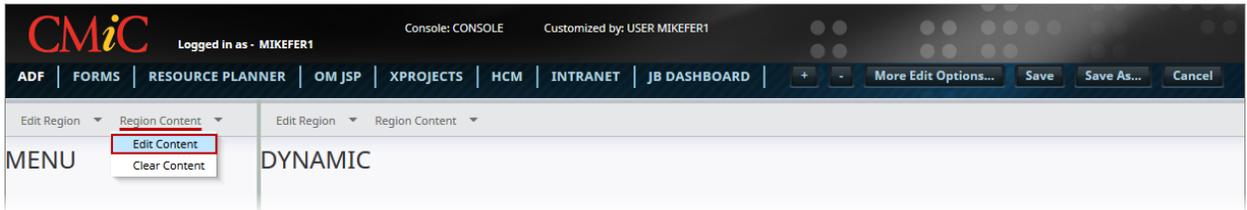
Step 2: Click Edit Mode to Launch Console Editor Tool



Step 3: Select Relevant Console Tab

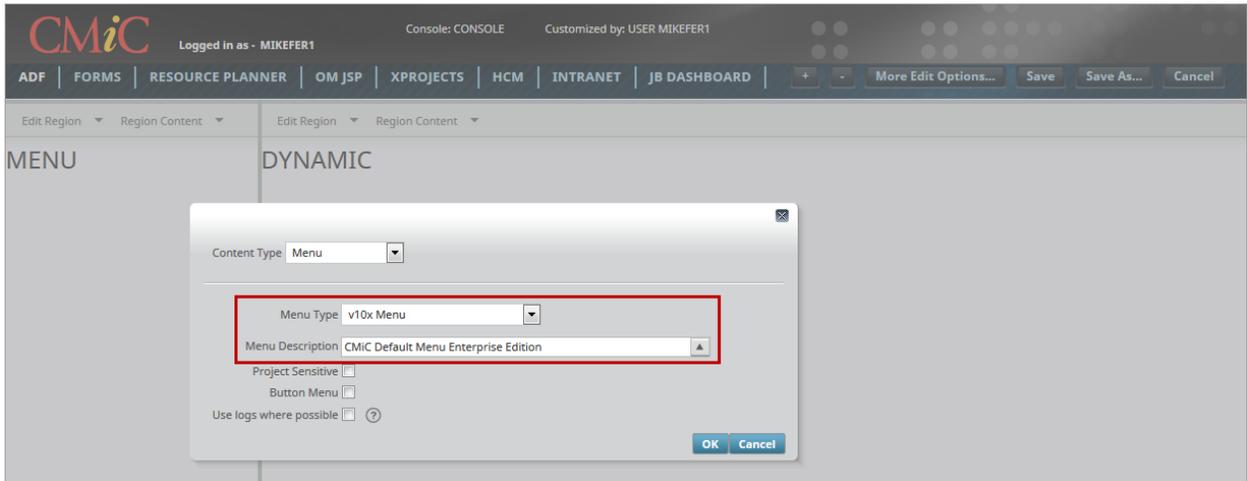


Step 4: Select Region Content > Edit Content



In the **Menu** pane, shown above, select **Editing Content** to bring up the following popup.

As shown below, the popup's **Menu Type** and **Menu Description** fields display what Console is used by the current user:



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