# Configuring the menu tree

As an administrator, you configure the menu tree under:

**ADMINISTRATION**
**--> Menu and actions**
**--> Menu maintenance**

In the overview, first select the **client** whose menu tree is to be edited. The menu tree of the corresponding client is displayed; the **+** and **-** buttons can be used to expand and collapse the overview.

> NOTIZ
> If the client has been newly created and not yet configured, the menu tree contains only the menu item "Logout".

By **drag & drop** or with the help of the options behind the **"Move"** button, the individual elements can now be moved, cut and pasted as desired within the menu tree. Actions that are present in the menu can also be viewed and configured directly from the menu maintenance.
Of course, **new menu entries** can also be added and removed. It is advisable to first create a rough structure by defining the **folder structure** first and then adding the associated actions.

All **menu actions** (add folder, change actions, etc.) can be called up via the buttons in the title bar. Alternatively, you can also use the **context menu**. To do this, click the desired entry with the **right mouse button** and select an action.

Changes in the menu tree are saved immediately. For the Webdesk user, however, changes only become visible after the menu cache has been cleared.

The various options for making changes are described in more detail below:

| Folder actions | Action link options | Template options |
|---|---|---|
| Create new folder[1] | Add action links[2] | Add template to menu tree[3] |
| Change folder name[4] | Delete action links[5] | Create new template[6] |
| Delete folder[7] | Edit actions/order[8] | Edit templates[9] |

## Folder actions

### Create new folder

To create a new folder, first click the existing folder to which the new folder is to be "attached". Then select the item **"Add folder"** in the **"Folder actions"** button or via the **context menu** (right-click). All that remains is to enter the name of the new folder in the popup window and confirm with **"Create folder"**.

## Change folder name

To change a folder name, first select the folder to be renamed. Then select the item **"Rename folder"** either via the **"Folder actions"** button or via the **context menu** (right-click).
Enter the new name in the text field; clicking **"Rename"** saves the new name.

### Editing the folder name translation

If the menu tree is to be available in several languages, the corresponding translations for the folder names can be edited here. First the corresponding folder must be selected - then select the item **"Edit folder name translation(s)"** either via the **"Folder actions"** button or via the **context menu** (right-click). Here you can now define the folder names for different languages in the corresponding text fields.

### Delete folder

To delete a folder, select the corresponding folder in the menu tree and select the menu item **"Delete folder"** either via the "Folder actions" button or via the context menu (right-click). As a security check, a popup appears asking whether the folder should really be deleted. Clicking the OK icon deletes the folder - including all subfolders and action links - from the menu overview.

## Actions for menu entries

### Add action links

To add an action to the menu tree, select the corresponding **folder** in which the action link is to be inserted. Then click the option **"Add action link"**, either via the "Action link actions" button or via the context menu.

> NOTIZ
> If the action is not to be displayed in a subfolder but **directly in the main menu**, the folder with the name of the **client** must be clicked before adding.

An overview of all available actions, configurations and process references appears. Select the desired element from the table; clicking the **green arrow** adds it to the previously selected folder in the menu tree. In the following dialog box you can either add another action or return to the overview.

### Delete action links

To delete a menu entry, select the corresponding entry in the menu tree and click the button "**Action link actions** > **Remove action link**.

The same result is achieved by selecting the corresponding entry and then choosing the option **"Remove action link"** via the context menu (right-click).

As a security check, a popup appears asking whether the action should really be deleted. Clicking the OK icon deletes the menu item from the menu overview.

### Edit actions/order

To edit a specific action in the menu structure, select the corresponding action and click (right-click) the "**Show/edit action"** button.

This takes you to the detail view of the selected action, where you can edit it as desired. If the selected element is a configuration, you can also jump directly to the configuration details and edit them - this is possible in the context menu (right-click) via the item **"Configure action"**.

If an action/configuration is to appear at a different position in the menu tree, this is easily done by drag & drop. Alternatively, this is also possible via the context menu: click the desired entry > right-click > **Cut**. Then right-click at the desired position in the menu tree > **Paste**.

The **order** of the displayed menu entries can be changed using the arrow keys in the "Move" button or in the context menu:

- **To the beginning**
  Clicking this action moves the corresponding folder or action to the beginning, so that it is in first place.
- **Up**
  This action moves the corresponding folder or action up by one row.
- **Down**
  This action moves the corresponding folder or action down by one row.
- **To the end**
  Clicking this action moves the corresponding folder or action to the end, so that it is in last place.

## Menu tree templates

In the menu maintenance it is possible to create **menu tree templates** (ready-made folder structures with corresponding actions), which can be inserted as a whole into the client tree. This allows a template to be created once and used several times.

When in the client tree view, first click the **"Menu tree templates"** button to call up the options for the menu tree templates. The dropdown list contains an overview of all templates already available.

### Add template to menu tree

To add a template to a client tree, you must first switch to the view of the desired client tree. Now the desired folder can be selected; via the "Template actions" button or via the context menu (right-click), click the option **"Add template to menu tree"**. The template is now integrated into the menu tree. In the menu maintenance view, the template behaves like a folder that can be expanded and collapsed, but in the user view of the menu the content of the template is displayed in the menu without an additional hierarchy level.

### Create new template

Clicking the

symbol creates a new template. In the following dialog box, a name must first be assigned to the template. Clicking **"Create template"** saves it and takes you back to the overview.

### Edit templates

If a template has already been saved and is present in the dropdown list, it can be selected to edit its structure. As in the client tree, folders and action links can now be added to or removed from the template structure via the button or the context menu.

## Displaying action permissions

Clicking a menu item displays an overview of the corresponding action, including the associated permissions, on the right-hand part of the screen. This makes it clear at a glance who holds the permission for the respective action/configuration/process reference.

# Felder

| Name | Wert |
|---|---|
| Modul | Portal & Organisation (po) |
| Webdesk Actionname | po_editMenu |
| Artefakt-Typ | Action |