

# fSeries Menus

fSeries menus are used in various ways to provide the user with a way to select options to generate fDocs documents and fSheets spreadsheets, open fPanels presentations and fMaps maps or even to link to other pages outside of fSeries. There are a number of ways they are used within fSeries:

1. As a direct deployment tool using the fSeries/Menu.aspx page
2. Within the fSeries/Viewer.aspx page
3. Embedded within fPanels presentations

Each of these options uses the same menu setup and in fact any one menu can be used in each of the above ways.

However you plan to use a menu its setup is the same. The fSeries Menu Builder lets you create and manage all of your menus.

When a user runs a menu it will typically be from a link inside your application. The link will include parameters such as which menu to show, but it can also include other values that determine menu content and which are also passed on in links from the menu (e.g. to fDocs or fPanels). For example ClientId=S0055643 may be included and then used to exclude those menu items that require a ClientId value and/or to pass the ClientId on to any documents and presentations. Note that this is not the only way values can be passed to a menu link (see Parameters).

If you have created your own menus using the old fDocs Admin tool, they can be converted to the new builder by using the [fDocs Menu Converter](#).

## Menu Builder

From the fSeries start page, click on Menu Builder. A list shows all fSeries menus with an indicator flag to show its publication status (green: fully published; amber: published but not the latest; red: not yet published). Select a menu from the list to edit, or click the option to add a new menu (you will be asked to give your new menu a unique id).

The Menu Builder page consists of four zones:

- The top banner has button icons for various actions such as saving and publishing
- The top strip shows the id and name of the menu and has options to edit the menu's top level details
- The side area shows the menu design with each menu item, with options add the bottom to create new menu items of different types
- The main area to the right is used to open various forms to add settings

and options for the menu and menu items.

## Action Buttons

The following action buttons are available:

- Save – the menu is saved, unpublished
- Save As – save the menu (unpublished) under a new id – make a copy
- Delete – remove the menu including any published edition
- Reset – the menu will be reset to its unpublished (unsaved) state
- Open – return to the selection page to open different menu
- New – start a new menu directly from here
- Information – details of this menu such as who created it and when
- Tools
  - Check Menu – run a validation check on the menu
  - Revert to Published – reset the menu to the published version
  - Unpublish – delete the published version of the menu
  - Test as *fSeries* Menu – open as an *fSeries* Menu in a new window/tab
  - Test as *fPanels* Viewer – open as an *fPanels* Viewer in a new window/tab
  - Builder Guide – open the Menu Builder help page
  - Functions – open the Functions help page

## Menu Details

### Menu DSD

Each menu may (optionally) have a DSD associated with it. This is used to gather data before the menu is displayed. The data can then be used within the menu, for example to exclude menu items based on security restrictions or to pass data on in the menu links.

If the DSD requires user entries these will be taken from the menu's top level parameters or (if not specified) from any values passed in to the menu from the link that was used to open it.

The Subject and Subtitle are optional and will be displayed in the menu as appropriate to the type of menu displayed. They taken from the DSD's Subject data group (if present). You can use placeholders to construct the text with field names surrounded by `##`. For example, `"#FirstName# #Surname# (#Age#)"` will show the client's first name and surname together with their age at the top of the *fPanels* Viewer.

## Menu Parameters

Parameters and associated values may be specified at the top level of the menu (as well as for each menu item). These menu top level parameters override any values passed in from the link that opened the menu and are used in executing the menu's DSD. They are also used later as global parameters for each menu item.

Each parameter has a key (e.g. ToDate) and a value which can be an entered value or an fSeries function (e.g. "=Date(-1)" – yesterday).

Functions that refer to data (e.g. =Value(...) ) refer to the menu's DSD. The =Request(key) function may be used to refer to parameters passed in from the link that opened the menu.

## Menu Items

The items in a menu represent either actual menu items to be included in the menu, or markers to show where items are to be included from elsewhere, for example from a directory of fDocs templates. When the menu is displayed by a user these markers are replaced as appropriate and the entire menu tree is displayed.

All menu types other than Groups may have parameters that pass values to the menu link. See separate section below.

Specific options are described below, but all types include the following general options:

Name	The text to appear on the menu (some menu types have a default name)
Help	Text to show help or a tool tip for the item
Disable	An fSeries function which if "true" disables the option but leaves it visible in the displayed menu
Exclude	An fSeries function which if "true" removes the option from the displayed menu

There are several different menu types:

### Group

This type groups other menu items together.

If the Expand option is checked the group is automatically expanded to show its content but the group itself is not displayed in the menu (in this case the group is just a useful container for a number of other items, for example to disable/exclude them all).

If the Expand option is not checked the group is displayed as a link to open and close its content. The Open option specifies that the group is to be

opened on initial display of the menu.

## **fDocs**

This type generates an fDocs document.

Select the directory and file of the fDocs template required.

The User Entries option lets you force the document to be generated without user intervention, or prevent the user from entering all user entries or just those supplied in the link.

You can specify one or more format to offer the user to select from. If you don't select any, all will be offered. If you select only one then that will be used without user intervention. If you have specified the auto generate option the first selected format will be used.

## **Directory**

This type is a marker to include fDocs templates from a directory.

Select the required directory, or leave unspecified to use the top level published root directory.

The Include SubDirectories option includes all subdirectories of the one specified (as a tree structure), otherwise only templates in the specified directory will be included.

The template names will be used as the menu item names but you can check the Hide Extensions option to show the files names without the extension (.docx).

If you check the Expand option the root directory (the one specified) will not be shown, only its contents.

User Entries and Format(s) option are available and are the same as for an fDocs menu type.

## **Index**

This type is a marker to include all fDocs templates within a template index.

Optionally the templates will be displayed in a tree structure (As Tree) or as a flat list. If you choose a flat list you may specify whether to include the template paths in the menu item display. If you check the Hide Extensions option the file names will be shown without the extension (.docx).

The Check Entries option lets you filter the templates in the index that are to be included based on user entries supplied (as parameters or from the link to the menu): all, those for which all user entries are supplied; mandatory, those for which mandatory user entries are supplied; none, only those templates with no user entries.

If the Expand option is checked the index is automatically expanded to show

its content but the container itself is not displayed in the menu.

If the Expand option is not checked the index is displayed as a group to open and close its content. The Open option specifies that the index is to be opened on initial display of the menu.

Format(s) may be specified as for fDocs menu items.

## **fSheets**

This type generates an fSheets spreadsheet.

Select the directory and file of the fSheets template required or the DSD if a default spreadsheet is to be generated.

The User Entries option lets you force the document to be generated without user intervention, or prevent the user from entering all user entries or just those supplied in the link.

## **fPanels**

This type opens an fPanels presentation.

Select the presentation required.

The User Entries option lets you prevent the user from entering all user entries or just those supplied in the link.

The Replace and Target options work together to specify whether the presentation should replace the current window or open in a new window, and if so optionally name the window. Note that in some uses of the menu this may be overridden; for example in the fSeries Viewer the presentation is always opened in the display area, regardless of these options.

## **fMaps**

This type opens an fMaps map.

Select the map required.

The User Entries option lets you prevent the user from entering all user entries or just those supplied in the link.

The Replace and Target options work together to specify whether the presentation should replace the current window or open in a new window, and if so optionally name the window. Note that in some uses of the menu this may be overridden; for example in the fSeries Viewer the map is always opened in the display area, regardless of these options.

## **TV Assess**

This type opens the TV Assess document generation page. TV Assess is a specialist extension of fDocs that generates a specific type of document.

The Replace and Target options work together to specify whether the presentation should replace the current window or open in a new window, and if so optionally name the window. Note that in some uses of the menu this may be overridden; for example in the fPanels Viewer the page is always opened in the display area, regardless of these options.

## **Menu**

This type is used either as a marker to embed another fSeries menu in the current menu, or to open another fSeries menu separately.

Select the menu required.

Use the Embed option to include the menu within this menu, otherwise the menu will be opened separately. If you include the current menu you cannot also choose to embed it (as this would casue a loop).

If you choose to embed the menu, the Replace and Target options are available, otherwise the Expand and Open options are available.

If the Expand option is checked the embedded menu is automatically expanded to show its content but the menu itself is not displayed.

If the Expand option is not checked the embedded menu is displayed as a link to open and close its content. The Open option specifies that the embedded menu is to be opened on initial display of the menu.

The Replace and Target options work together to specify whether the non-embedded menu should replace the current menu or open in a new window, and if so optionally name the window. Note that in some uses of the menu this may be overridden; for example in the fPanels Viewer a non-replaced menu is opened in the display area, regardless of these options.

## **Link**

This type opens a link to a web page.

Enter the URL that you wish the menu item to link to.

The Replace and Target options work together to specify whether the linked page should replace the current menu or open in a new window, and if so optionally name the window. Note that in some uses of the menu this may be overridden; for example in the fPanels Viewer the linked page is always opened in the display area, regardless of these options.

## **Parameters**

All menu types except Group may have parameters that let you pass values to the links.

When the user clicks on a menu link parameters are calculated from the following, in this order of hierarchy:

1. First from the parameters set for the menu item
2. Next from the parameters set for the menu that are not also set for the menu item
3. Finally from the values passed in through the link that opened the menu, for which a parameter has not been set for the item or the menu

A parameter consists of a key and a value. The key is most likely to be a user entry for, say, an fDocs template. The value may be a specific value, or an fSeries function which is calculated when the menu is displayed.

Functions that refer to data (e.g. =Value(...) ) refer to the menu's DSD. The =Request(key) function may be used to refer to parameters passed in from the link that opened the menu.

Note that even if a value is blank, that will override other parameters in the hierarchy.

A special reserved parameter call fLocator is used to apply a class to the menu item and will not be passed as a parameter. This is used by called pages to control the contents of the Viewer dynamically.