Deltek Vision® 7.x Navigation Menu Designer Quick Reference Card

Use the Navigation Tree Designer to:

- Rearrange menu items, at both the top and sub levels.
- Add new menu items, such as custom pages, http addresses, and external files and documents.
- Indent or outdent menu items.
- Delete user-defined menu items.

Accessing the Navigation Menu Designer

Click the Navigation Menu icon at the bottom right of the Vision Navigation menu. (Do not confuse this icon with the similar icon at the bottom right of the Vision screen. That icon opens the Screen Designer).

Navigation Tree Designer and Security

You must have a security level of ADMIN to use the Navigation Menu Designer. Changes you make to the navigation tree are system-wide.

When you add a menu item to your tree, Vision also adds it in Security as an option that can be restricted by role. See the Vision Online Help system for more information.

For More Information

See the Vision Online Help for complete information about this feature. It offers additional information about creating custom help topics, initiating workflows, and more.
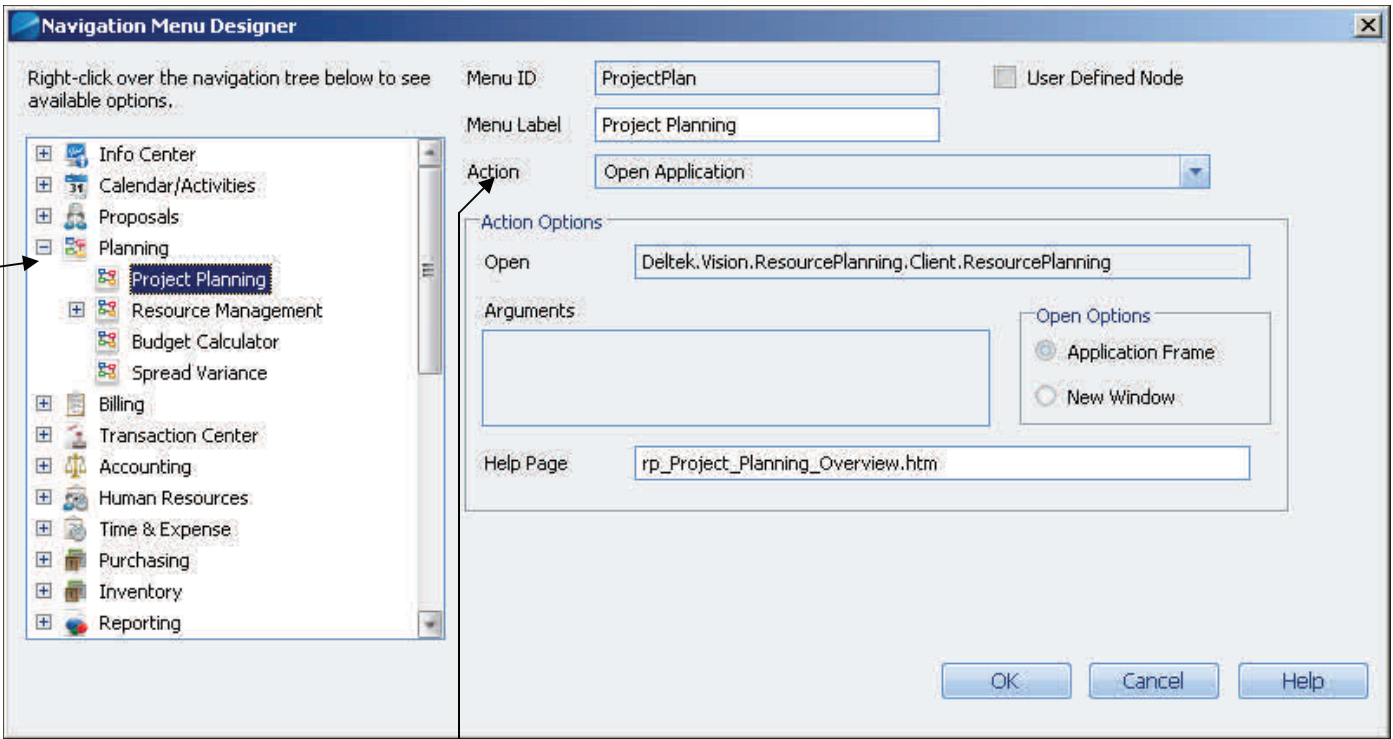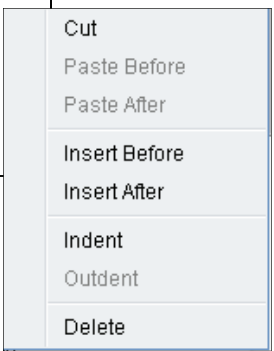

Navigation Menu Functions

To display the list of menu functions, left-click the menu tree item that you want to work with. The information for that menu item displays in the Navigation Tree Designer field.

Right-Click Menu Options

Right-click the item to display the list of available options, which are described in the following:

- To move a selected menu item from one location to another, use the **Cut** and **Paste before/Paste after** functions.
- To insert a new menu item, use the **Insert before/Insert after** functions. Then use the **Action** and **Action Options** fields to determine what type of menu item you want.
- To indent or outdent a selected menu item, use the **Indent/Outdent** functions.
- To delete a selected user-defined menu item, use the **Delete** function.

Menu Item Actions

When you add a new menu item, you use the **Action** field to determine what type of menu item you want it to be. When you select an action, the fields in the **Action Options** field change accordingly.

You have the following Action options:

- **Parent**. Adds a parent menu item. Its purpose is to house other menu items and has no action of its own.
- **Open Application.**. This option only applies to system-defined menu items and cannot be changed.
- **HTTP**. Adds an http address, for example your company's intranet site. You can then enter the Web address.
- **File**. Adds an external file/document, for example your company's employee handbook. You can then enter the network share file name.
- **Web Outlook**. Adds the Web Outlook application. You can then enter the Web address, Outlook folder, and Outlook user ID.
- **Report**. Adds a favorite report. You can then select a report from a list, and determine if you want it to recalculate each time you select it.