

**CAUTION !! All new procedures and processes should be checked in the 'Test' environment before being applied to the 'Live' business system.**

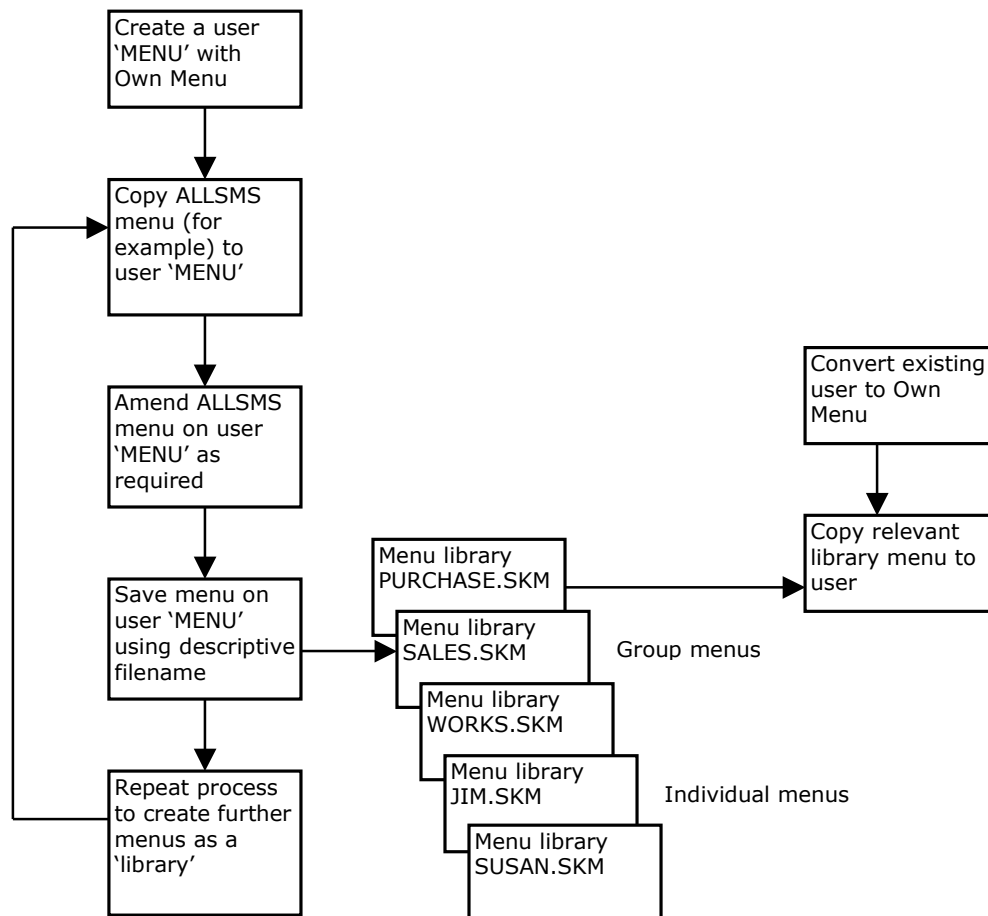
## **CREATING USER 'OWN MENUS' – VER 2**

It is preferable for users to have their own menus, allowing access only to the functions and Reports/Enquiries that they need. The menus can also be created for groups of users all requiring the same access, for example Sales Group, Purchasing Group etc.

The following procedure explains a method for achieving the above by modifying an existing menu (deleting functions not required) to create a 'library' of different menus.

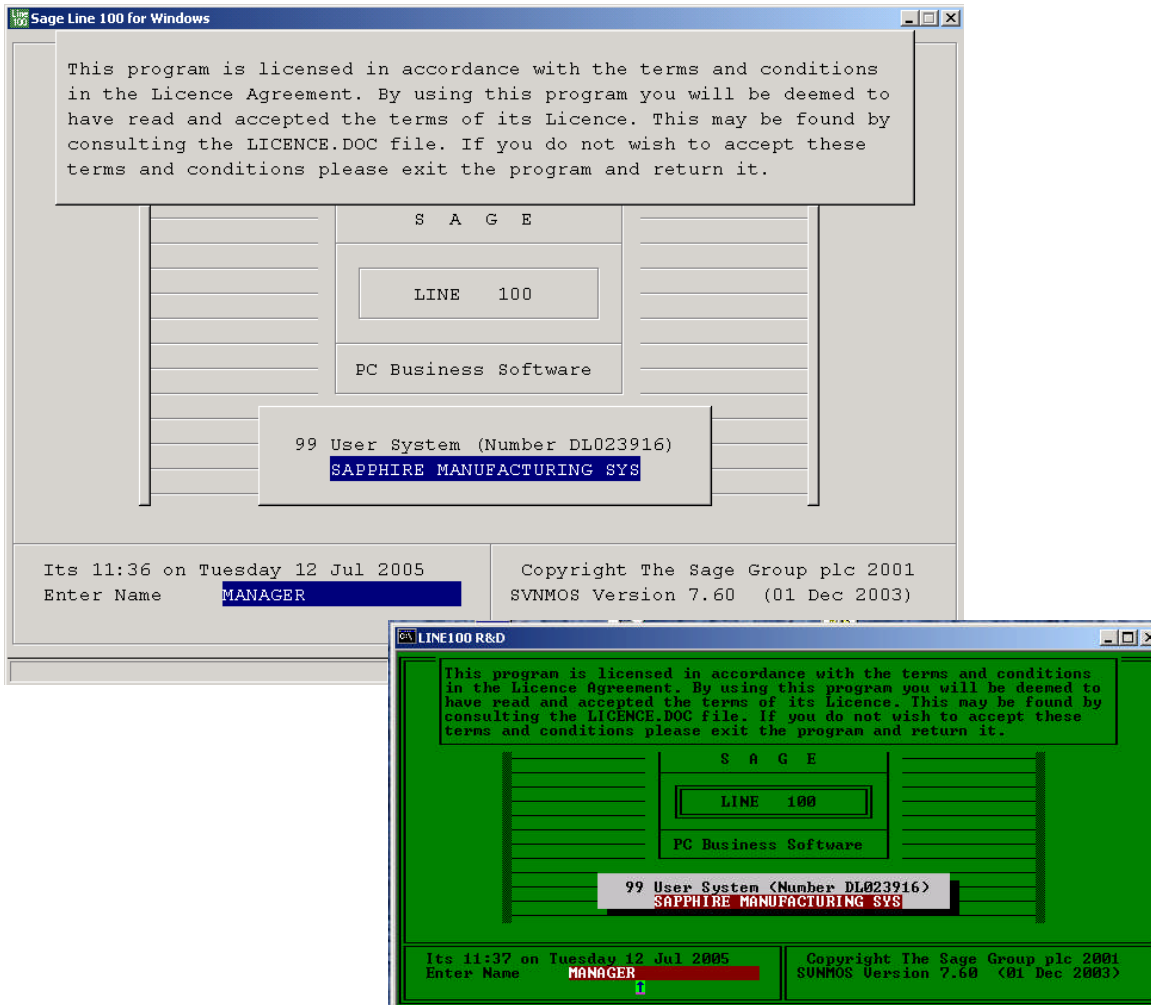
By setting up a separate user called MENU, the changes can be made without affecting existing users, and can be easily checked/tested 'offline'. The advantage of using the 'library' menus is that new/additional users, or users changing their functional role within the business can be quickly assigned to a new/different menu structure.

The process is



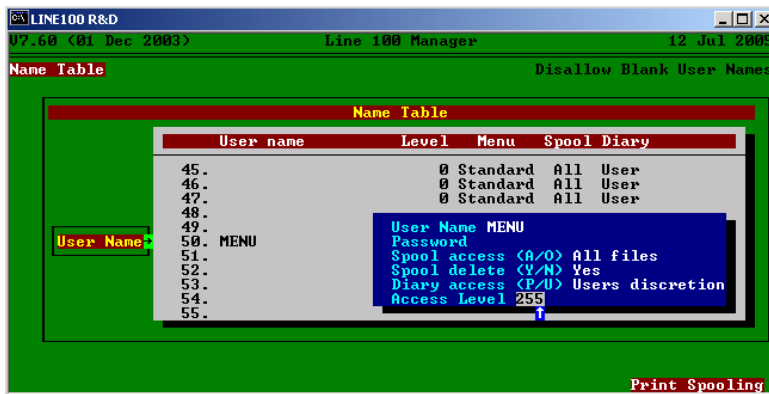
## 1. Create a new user on the system with the User name 'Menu'

### 1.1 Log into the system (DOS or Windows) as Manager



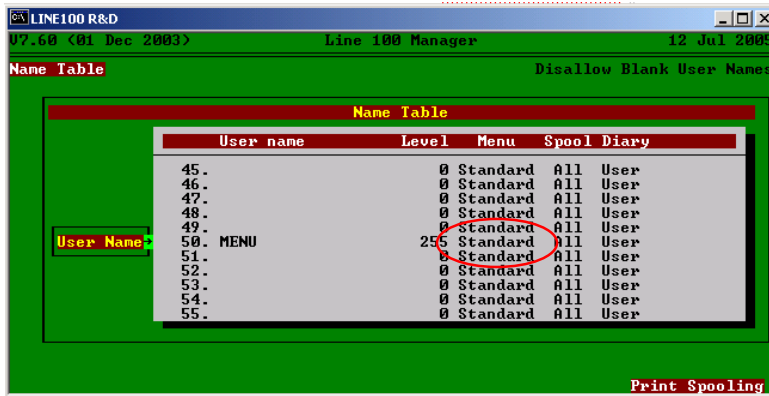
The DOS screens have been used throughout this document.

1.2 Select Name Table, User Names

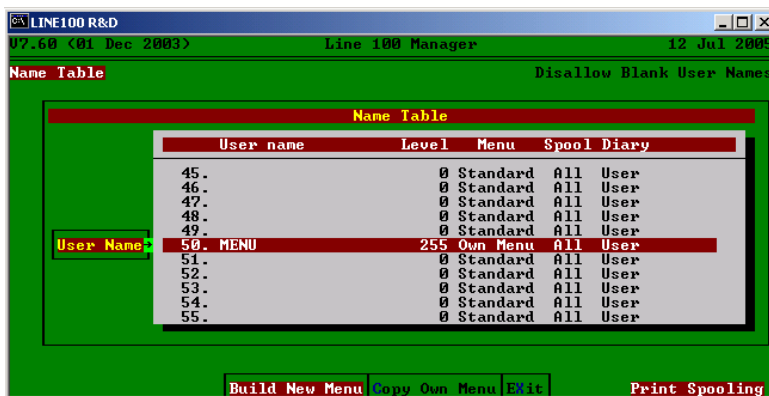


Scroll to a 'free' User name number (50 in the above example) and press Return. Enter the User Name and details as shown in the blue box, and Return to accept the information entered.

1.3 Escape to return to the base menu bar and select 'Menus'



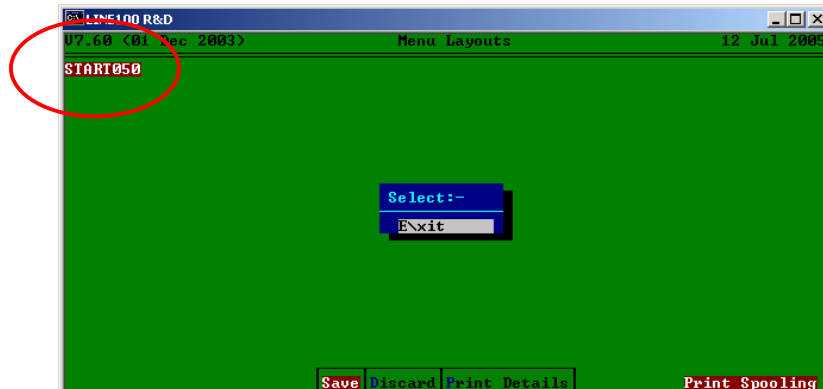
1.4 Scroll down to the user MENU. Note that this user currently has a 'Standard' menu.



Press Return and then select 'Build New Menu'

1.5 A new menu is displayed with only one option available, which is 'Exit'.

Press 'ESC' to display the base menu bar and then select 'Exit', 'ESC' and finally 'Save'

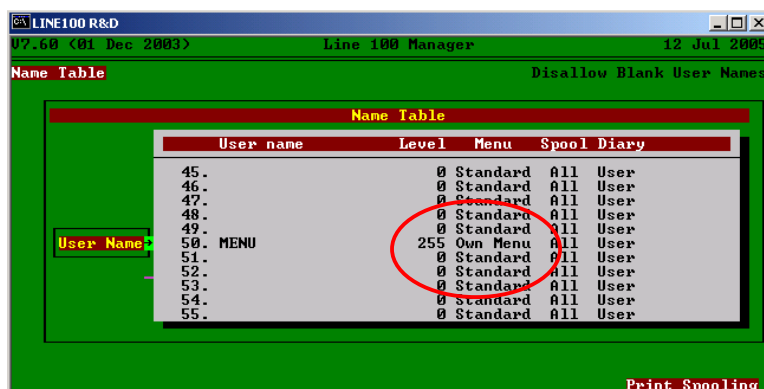


START050 is the number for this users menu, as 50 is the User number from the Name Table. The number is always shown as 3 digits in the file name. The actual filename is the above menu name/number with the suffix SKM

For example user 1 would have the filename START001.SKM

**NOTE !!** User 50 and the associated file START050.SKM are used throughout this document. If a different user number is chosen, substitute that user number and the file STARTxxx.SKM as appropriate

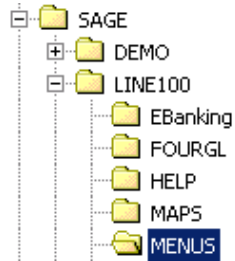
Note that user 50 (MENU) now has an own menu



1.6 Log out of Sapphire as Manager

## 2. Menu file location and File names

2.1 Locate the menu folder location. The path is typically *Sage, Line100, Menus* on the file server.



Within the folder there will be the recently created file, in this example START050.SKM  
If the location is not known, try using Start, Search to look for the file.

2.2 Rename the START050.SKM file as START050BASE.SKM so that it becomes a 'safe' copy that can be used later and in future if required.

2.3. There should be two files in the folder (or on the installation CD), and these are the 'master' menus that will be copied and amended

- ALLSMS.SKM            Contains all SMS Sapphire programs (excludes Sage L100)
- STANDARD.SKM        Contains all Sage L100 and SMS Sapphire programs

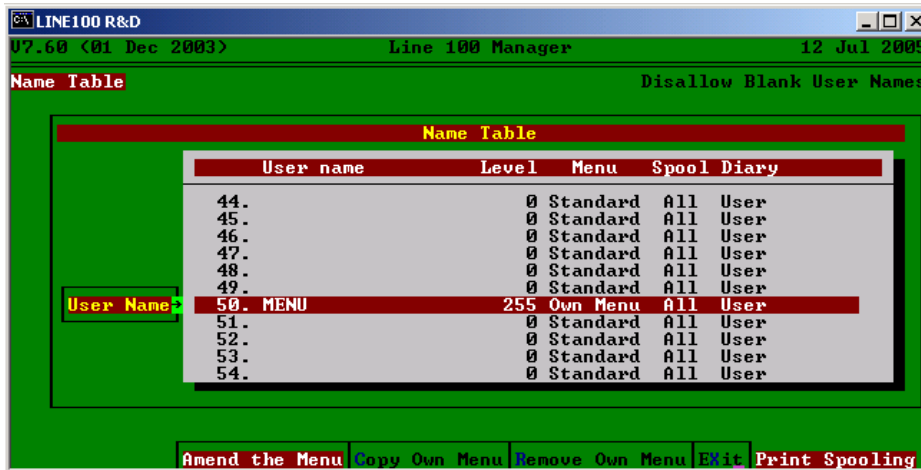
Copy one of these files and rename it START050.SKM.

2.4 The user number 50 (MENU) now has all of the available options to select from. Log in as user MENU if necessary to check. This menu can now be edited within the System Manager as required to suit an individual user or user group (for example Sales). When the menu changes have been completed, Log in again as user MENU to confirm that the functions are as expected.

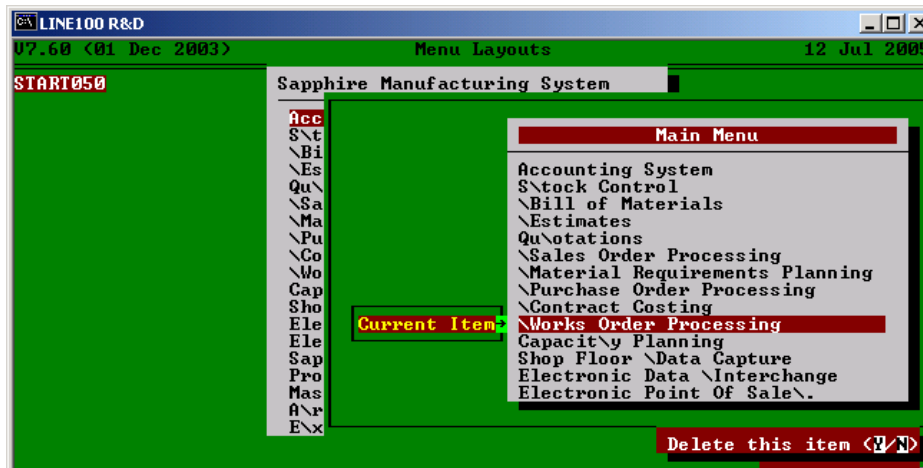
### 3. Amending a Menu

#### 3.1 To remove a complete module, such as Works Order Processing

Logon as Manager; select *Name Table* and then *Menus*. Scroll down to the user MENU (in this example user 50). Press Return and then select 'Amend the Menu'



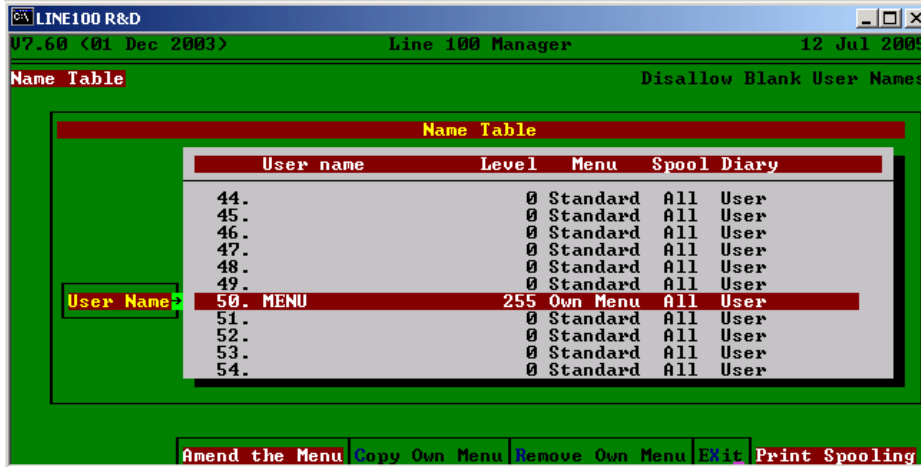
- Press 'ESC', then select 'Option List' and press 'Return'
- Scroll down to the module to be removed.
- Press the 'Delete' key
- The line is highlighted and the option given to 'Delete this item Y/N'



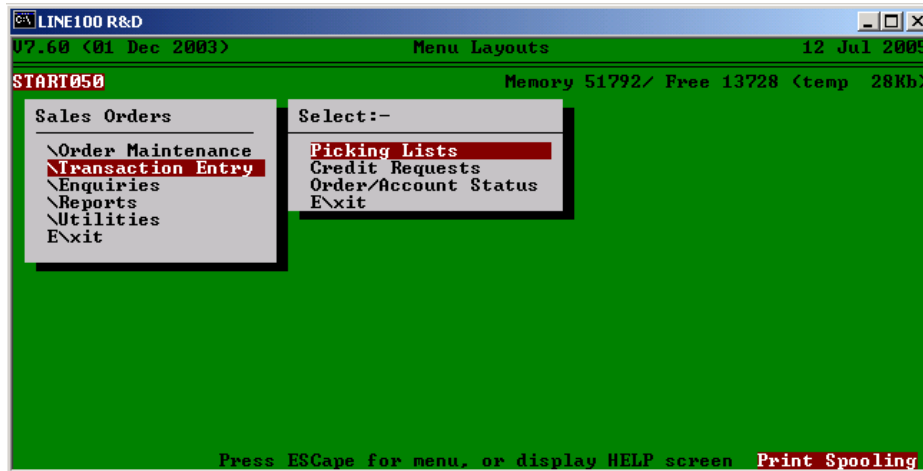
- Press 'Y' to delete the item
- Select another module to delete and repeat the above process OR
- Press ESC twice to move back through the menus until the 'Save' option is displayed and then select by pressing 'Return'.

3.2 To remove a sub module item, such as *Sales Order Processing, Transaction Entry, Picking Lists*

Logon as Manager; select 'Name Table' and then 'Menus'. Scroll down to the user MENU (in this example user 50). Press Return and then select 'Amend the Menu'

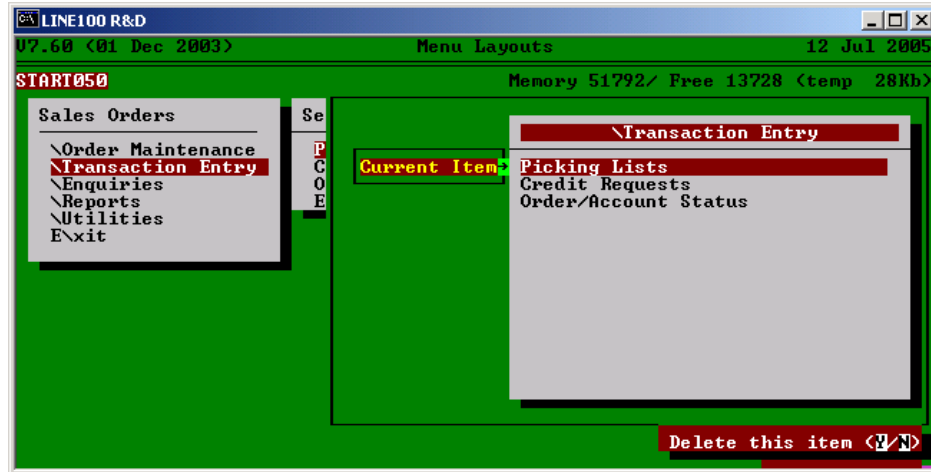


- Scroll down to the module to be amended (partial functions deleted)
- Press Return to move to the next level down in the menu and scroll down to the function group to be amended
- Scroll down on the next menu to the option to be deleted



- Press ESC and then select 'Option List'
- Scroll down to the program to be removed.
- Press the Delete key
- The line is highlighted and the option given to Delete this item Y/N

## Data Sheet for User Menus



- Press 'Y' to delete the item
- Press ESC to move back through the menus until the 'Save' option is displayed and then select by pressing Return.

**IMPORTANT !!** The Utilities function within each module should not generally be available to users except Administrators

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#### 4. Saving the modified menu as a 'Library' menu

4.1 The amended menu is still held under the filename START050.SKM, linked to the user 50 (MENU)

- Move to the menu directory as determined in (2.1) above
- Rename the file START050.SKM as a 'library' filename – in this case for example we may use SALES.SKM

4.2 To create further user/group menus repeat the process from (2.3) to (2.5) above by first creating a new START050.SKM menu by copying, for example, ALLSMS.SKM.

In this way a 'library' of menus can be created such as SALES.SKM, PURCHASE.SKM, WORKS.SKM etc

**HINT!!** If creating a series of 'library' menus, create the one with the minimum number of deletions first. Then use this menu as the basis for the next menu instead of starting again with the STANDARD.SKM or ALLSMS.SKM. Similarly, deleting all the Utilities groups (and other unwanted functions) could create a 'user menu master', and this could be used as the basis for further user menus.

#### 5. For security

When you have finished amending/creating library menus,

- Delete the START050.SKM file
- Make a copy of the file START050BASE.SKM and rename it START050.SKM

Any users logging in under the user name MENU will now only have the option to Exit !!

## 6. Copying Library Menus to Users

The user must have an 'Own Menu' option set, not a 'Standard' menu.

**IMPORTANT !!** Check that item 5 has been completed so that user MENU now has only the 'Exit' menu available. Check by logging in as user MENU if necessary

6.1 Login as *Manager*, *Name Table*, *Menus* and scroll down to the user to be amended.

User name	Level	Menu	Spool	Diary
18.	0	Standard	All	User
19.	0	Standard	All	User
20.	0	Standard	All	User
21.	0	Standard	All	User
22.	0	Standard	All	User
23.	0	Standard	All	User
24.	0	Standard	All	User
25. NORMAL	255	Standard	All	User
26.	0	Standard	All	User
27.	0	Standard	All	User
28.	0	Standard	All	User

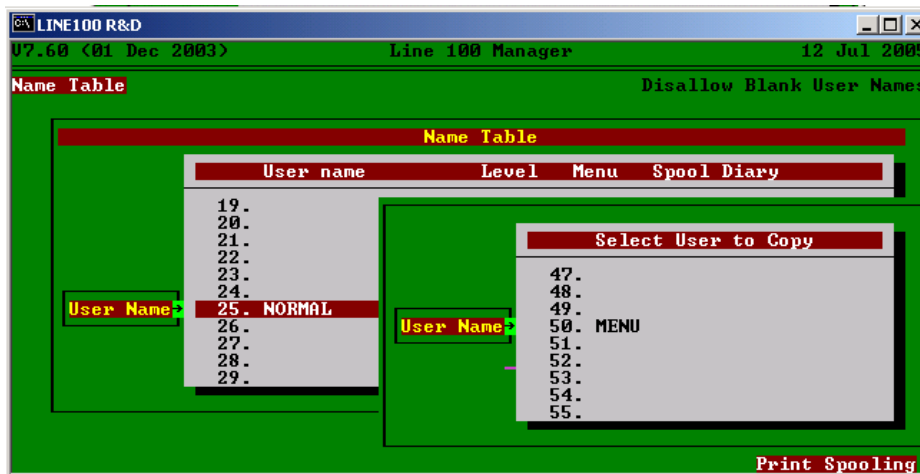
In this example the user is number 25 NORMAL, and currently has a Standard menu

**NOTE !!** If the user is already shown as having an 'Own' menu, logout and move to section 6.2 of these notes

User name	Level	Menu	Spool	Diary
19.	0	Standard	All	User
20.	0	Standard	All	User
21.	0	Standard	All	User
22.	0	Standard	All	User
23.	0	Standard	All	User
24.	0	Standard	All	User
25. NORMAL	255	Standard	All	User
26.	0	Standard	All	User
27.	0	Standard	All	User
28.	0	Standard	All	User
29.	0	Own Menu	All	User

Press Return and then 'Copy Own Menu'

Select User to Copy as number 50 (MENU) and press Return



This will convert the user 25 from 'Standard' to 'Own' menu and create the user start menu file START025.SKM in the menus folder.

ESC out of the system.

6.2 If the user is already set as an 'Own' menu user, you may wish to save their existing menu before assigning them to one of the new 'library' menus, so that they can be returned to their original menu if necessary.

- Make a copy of the existing menu file, for example START002.SKM, where the user is number 2 on the user name list
- Rename the copy as START002OLD.SKM

The user can be restored to their original menu at any time by deleting their start file START002.SKM and replacing it renaming START002OLD.SKM (or a copy) as START002.SKM

6.3 Now that the user has been created as an 'own menu' user, they can be assigned any of the 'library' menus

- Move to the menu directory as determined in (2.1) above
- Delete the start file for the user to be assigned a 'library' menu, in this example START025.SKM
- Make a copy of the required library file, for example SALES.SKM and rename it START025.SKM
- User 25 now has the SALES menu

**NOTE !!** For more information on amending menus see the Sapphire System Manager Manual section 6.3

The menu files have a size limit of 64K. This should not be a problem if using the process as described above, where menus are being amended by deleting options (thus making the file smaller) but should be considered if additional modules are added. If a menu file exceeds 64K then the menu tree may appear 'blank' in the Windows version. The STANDARD.SKM menu is just on the 64K limit to give the maximum possible number of options.

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