Navigation Menu Setup

The Navigation Menu wizard controls the appearance of the navigation menu on a personal or team-wide basis. Individual users can use Preferences under the User Menu to access the wizard and personalize their navigation menu without affecting other users; administrators can use the Look and Feel menu to access the wizard and apply changes to multiple selected teams.

Admins can create any number of navigation menu configurations and apply them to teams, and they can decide whether changes should forcibly override personalized menus, be offered as an optional change, or not be shown to users at all.

> ⚠ Editing any navigation menu automatically converts it to a top nav bar if it was previously saved as a left pane. To preserve the configuration as a left pane, click Cancel. For assistance on managing the transition to the new top nav bar, see Switching to the New User Interface.

Navigation Menu Wizard

Use this to customize the appearance of the nav bar.

To access the Navigation Menu wizard...

1. Go to **Setup > Look and Feel > Navigation Menu Setup.**
2. Edit an existing configuration or click New to create a new configuration.

General Tab

On the General tab, you can add a label, a name, and a description for the configuration.

Content Tab

Use the Content tab to determine the items, tables, and table groupings that appear in the navigation menu. On the right, you can preview and test the nav bar as you edit.
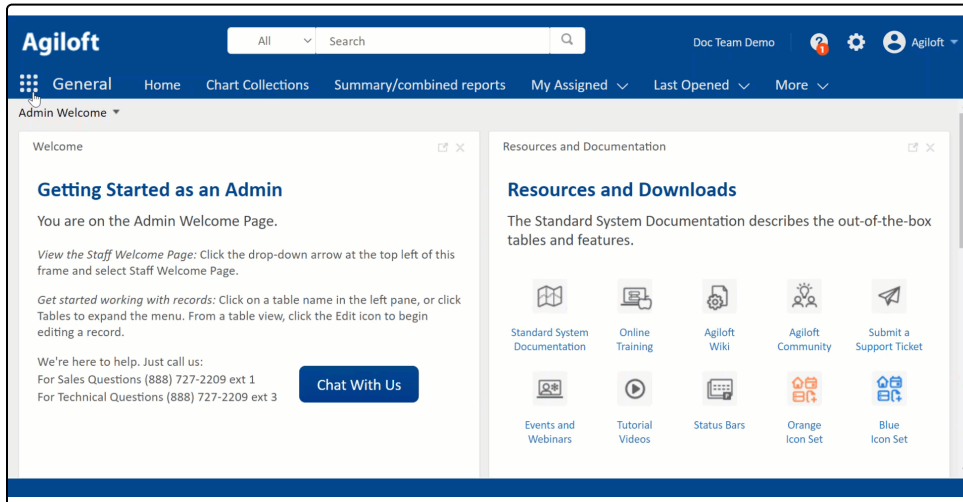
Nav Bar Groupings

On the left-hand side, use the drop-down to see either the list of System Items or the list of Tables. This filters the options that appear for selection. The Tables list on this tab shows all tables in the knowledgebase, regardless of additional group permissions. If a group has the option "Show table on the Toolbar?" set to No in the Table Permissions wizard for a particular table, and they access the wizard from the Preferences menu, they will still see that table on the list.

You can drag items on the right-hand list to reorder their placement. You can add or remove items from the navigation menu by selecting them in the appropriate list and clicking Add or Remove. The Table wizard also contains a Navigation Menu tab that allows you to choose whether to add or remove the table from specified navigation menu configurations.

Add a Grouping

You can choose to group items, tables, or both under a common heading by placing them in a grouping:

1. Click New Grouping, add a name, and click Finish.
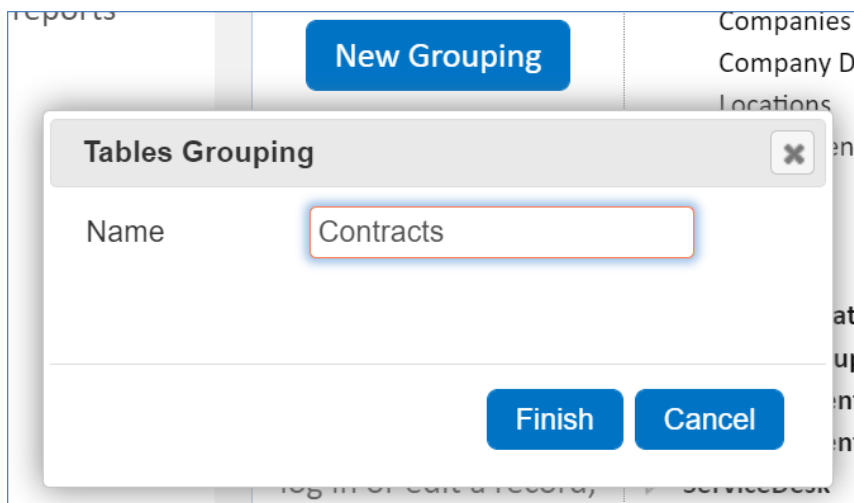
New Grouping

2. Drag items into the new grouping header to include them in that grouping. The same item can be added to multiple groupings, so you can design the groupings to serve many different workflows.


Contracts grouping

3. If you add system items like Home, My Assigned, or Last Opened, select each one in the right-hand list to show additional options in the Configuration column. You can use different settings on each instance of the item. For example, you could add Home to each grouping and select a specific dashboard that is most relevant to the grouping.

Remove a Grouping

To remove a grouping, select it and click Remove. A warning message appears to confirm you want to remove it and all the items inside the grouping. Click OK to remove it.
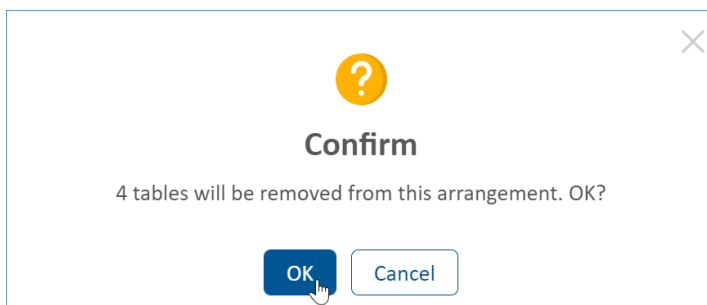
Confirm message

⚠ Tables that are removed use a different text style from the other tables.

Apply Tab

Use the Apply tab to apply the menu configuration to the selected teams.

1. Select the "Apply changes to me now" checkbox to apply the new configuration to you. Clear this checkbox to apply the changes to other teams without overriding your personalized settings.
2. Choose whether to keep the existing default menu settings, or to set this menu configuration as the main default for selected teams. Changing the settings makes this configuration the default for users whose primary team is selected in the list. Here, you can also apply this configuration to subteams of the selected teams, and set it as the default for any new teams that are created.
3. Choose whether to override personalized preferences with this configuration. This "Push to users" setting has three options:
   - **Do not push changes to users**. This option doesn't push any changes to existing users, but it still allows you to save updates to the configuration for future use.
   - **Force changes upon users**. This updates the navigation menu for all affected users automatically.
   - **Notify users about optional changes**. This notifies users that updates were made to their navigation menu configuration, and they can choose to accept those updates or leave their menu the way it is. For users without permission to modify their own preferences, this option works the same way as "Force changes upon users," and the changes are made automatically. If you choose this option, you must enter a message to show with the notification.