

INTERFACE AND ENVIRONMENT

USING BPO - RIBBON CONFIGURATION

You can customize the **BPO** ribbon to arrange tabs and commands in the order you want them, hide or unhide your ribbon, and hide those tabs and commands that you use less often.

Ribbon Access: Quick Access Toolbar > Customize the Ribbon

RIBBON CUSTOMIZATION

• Click on the *Quick Access Toolbar* icon.

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	Equipment and	Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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- A pop-up menu will appear with an option to *Customize the Ribbon*.
- Click on this option.

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Customize	e the Ribbon									
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• The *Ribbon Customization* screen will be displayed.



Ribbon Configuration

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	Reset +	New Rename ImportExport OK Cancel	



CHOOSE COMMANDS FROM...

- The left-hand side of this screen is the *Choose commands from:* menu which contains a list of all the *Tabs* and *Commands* available in BPO2.
 - This list is static and reflects the way your ribbon has automatically been configured on installation of BPO2.



Ribbon Configuration

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	Reset *	New * Rename ImportExport * OK Cancel	



ALL TABS

• In this *Choose commands from* menu you can view all the *Tabs* and *Commands* in the *All Tabs* list.



Ribbon Configuration

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	New * Rename ImportEx	cel	

• This list can be expanded using the *drop-down arrows* next to the Tab titles to reveal the *Commands* contained in each tab.



- In this image the *Equipment and Locations* tab has been expanded to reveal the commands that are within that tab.
 - You will see that this is a list reflection of your *Equipment and Locations* ribbon tab and its commands as currently displayed in the ribbon.



Ribbon Configuration

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- The entire *All Tabs* list can be expanded to examine the contents.
- Use the scroll bar to peruse the tabs and commands that you may want to select for your customized ribbon.





- Click on the *drop-down arrow* in the *All Tabs* row.
 - $^\circ\;$ A menu list will be displayed that gives two options;
 - All Tabs and All Commands.

ALL COMMANDS

• Click on the *All Commands* option.



Ribbon Configuration

Equipment and Locations Contract Pinance and HR Inventory Maintenance and Pr	rojects Manufacturing Procurement Sales Service Reporting Utilities -
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Reset *	Nev * Rename Inport/Export *

• Now an alphabetical list of all the *Commands* in BPO will be displayed.



• These commands are all available to be added to any of the tabs in your customized ribbon.





CUSTOMISE THE RIBBON...

- The right-hand side of the screen is the -*Customize the Ribbon* frame, where you will be adding your personally selected ribbon *Tabs* and their relevant *Commands*.
- It is auto-populated when you first open the screen, with all the check boxes selected.



Ribbon Configuration





CHANGE TAB ORDER

• You can change the order of the *Tabs* in your customized list by using the *arrows* in the centre of the screen.





For example:



- In this image *Procurement* has been selected.
- It is currently **7th** position in the list.





• Click twice on the *up arrow*.



• **Procurement** has now moved up in the list to **5th** position.





Additionally, in your ribbon, *Procurement* will now display 5th instead of 7th.



Ribbon Configuration

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CLEAR ALL CUSTOMIZATIONS

- Use the *arrows* to move any of the *Ribbon Tabs* into the order of your choice.
- To clear all the populated fields, un-tick the check box next to *Unassigned Pages*.

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• This will <u>clear all</u> customizations for you to be able to start with a clear slate.



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• Every one of the Tab check boxes has been deselected.

SELECT SPECIFIC CUSTOMIZATIONS

- Alternatively, you can re-populate all the Tabs by clicking again on the *Unassigned Pages* check box.
- Then select, by un-ticking, the check boxes next to the specific Tabs that you do *not* want in your customized Ribbon.
- In this image, the *Contract* and *Inventory* Tabs have been deselected.
- Click on **OK** to save your Ribbon customization.





• Your *Ribbon* will now display the customizations that you have made.



• In this image, the *Contract* and *Inventory* tabs are no longer displayed in the ribbon.

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ADD NEW CATEGORIES, TABS AND GROUPS

- You can add *New Categories*, *New Tabs* and *New Groups* to your Ribbon.
- Select any of the tabs in the list.
 - In this image the *Utilities* tab has been selected.





- *Right click* on the selected Tab to display a pop-up menu.
- In this menu, click on New Category .







- A *New Category* has been added to the list.
- The system automatically adds a *New Tab* and a *New Group* within a new category.
- The *New Category*, *New Tab* and *New Group* have (*Custom*) after their titles to let you know that they are your customized additions to the list.



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- You can also add a *New Tab* without creating a *New Category*.
- *Right click* on any Tab in the list. In this image the *Sales* Tab has been selected.



- The pop-up menu will be displayed.
- Click on New Tab.





- A *New Tab* (and automatically a *New Group*) has been added to the Customized list.
- The *New Tab* has been positioned above the Tab you selected but this position can be altered as explained by using the *arrows* in the centre of the screen or by selecting the *Move Up* or *Move Down* option in the pop-up menu.





 New categories, tabs and commands can also be added by using the *New* button at the foot of the Customize the Ribbon screen.





- Click on *New* and select from the drop-down menu.
 - In this image, *New Tab* has been selected.





 A *New Tab* (and automatically a *New Group*) has been added to the Customized list.



- When you add using the *New* button then your additions are place *below* the Tab that you had highlighted before you clicked on New.
- In this image, the *New Tab* (and *New Group*) were added *below* the *Equipment and Locations* Tab which was highlighted.







RENAME CATEGORIES, TABS AND GROUPS

- You can rename each of these new customizations by selecting and right clicking on one of them.
- In this image, the *New Category* has been selected (highlighted).
- This will display the pop-up menu again.
- Click on *Rename*.



Ribbon Configuration

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- A *Rename* pop-up screen will appear.
- The *Display name:* cell auto populates with the original name of New Category.
- Type your name of choice over *New Category* in this cell.



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• In this image, the title *Category 1* has been typed.



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- Click on **Ok** to save your name change.
- Or *Cancel*, if you do not want to save the new name.



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• Your *New Category* has now been renamed and saved as *Category* **1** in the *All Tabs* list.





Follow the same procedure to rename the *New Tab* and *New Group* categories.





• In this image they have been renamed **Tab 1** and **Group 1** respectively.







ADD COMMANDS TO A GROUP

- <u>All</u> Categories and <u>All</u> Tabs can be renamed but *New Groups* can be renamed *and* have any *Commands* added to them.
- Open the *All Commands* list on the left side of the screen. Use the scroll bar to search through the list.
- Click on the command that you want to add to *Group 1*.
- In this image *Customers* has been selected from the *All Commands* list.



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• The right directional arrow has now been activated in the arrow list in the middle of the table.



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• Click on this arrow to copy the *Customers* command to *Group 1*.

• The *Customers* command has now been added to *Group 1*.



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ADD COMMANDS TO A TAB

- You can also add a command to a Tab by clicking on your selected command in the *All Commands* list.
- In this image, *Production Centres* has been highlighted.





• Now *right click* in the *Customize the Ribbon* list on the *Group* to which you would like to add this command.



- In this image *Group 1* has been highlighted.
- The pop-up menu will be displayed with an option to Add.
- Click on Add.





The *Production Centres* command has now been added to *Group* 1.

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- You can add as many commands as you want to *Group 1* (or any *New Group* that you have created) and even add a command more than once.
- In this image, the *Stock* and *Invoices* commands have also been added to *Group 1*.





• This list of *Commands* can be re-ordered (as with *Tabs*) according to your preference using the *arrows* in the centre of the screen.



Ribbon Configuration

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CHANGE THE ORDER OF COMMANDS AND TABS

- You can also change the order of a *Command* (or a *Tab*) by clicking on that *Command* to highlight it.
- Now *right click* to display the pop up menu.
- In this image, we have highlighted the *Deliveries* command.





• Select the *Move Up* or *Move Down* option to change the order of the selected command.

RENAME COMMAND

- We can also use this pop-up menu to *Rename* the selected command (as with *Tabs*).
- *Right-click* on your selected command. In this image, *Deliveries* has been highlighted.
- The pop-up menu will be displayed.
- Click on *Rename*.

• The *Rename* screen will be displayed.

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• Type your command name of choice over the auto populated name in the cell.

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• Click on *Ok*.

• The new name of the command will now be displayed in the *Customize the Ribbon* list.

RESET CUSTOMIZATIONS

• When you are finished with your customizations, either click on *Reset* to return to the original ribbon configuration.

SAVE CUSTOMIZATIONS

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• Or click on **OK** to save your changes.

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• Your customizations will now be displayed in your *Ribbon*.

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