



# **INTERFACE AND ENVIRONMENT**

# USING BPO - QUICK ACCESS TOOLBAR (QAT) SETUP

The **Quick Access Toolbar** (**QAT**) is a customisable toolbar that allows the user to *add* or *remove* a set of buttons or commands that are <u>independent</u> of the tab on the ribbon that is currently displayed. These buttons / commands are *always* available and may be used and generated across <u>all</u> environments, no matter what kind of page is opened, what navigational panel is active or which ribbon bar tab is visible.

By default, the **QAT** is in the upper left-hand corner of the BPO interface. A user may *relocate* it to be displayed either above or below the ribbon.

#### Ribbon Access: Quick Access Toolbar Icon

- When you first set up BPO2 the *Quick Access Toolbar* icon is located above the Ribbon.
- Click on the icon.



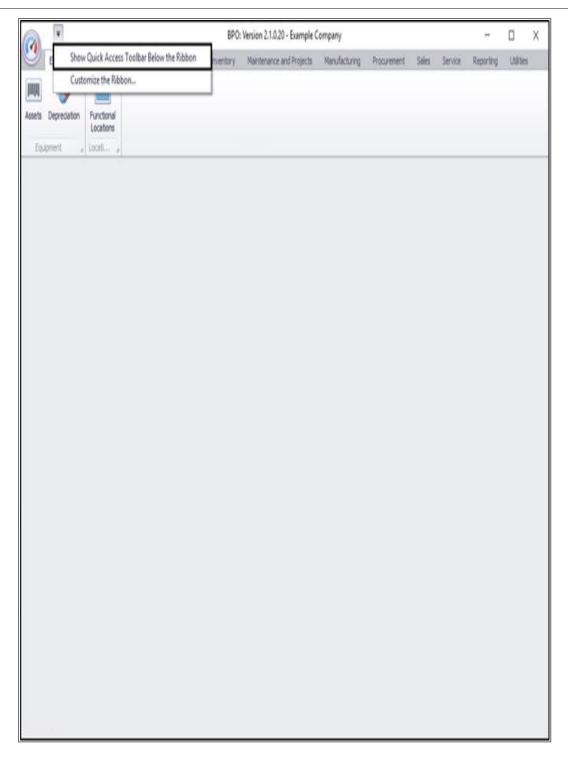
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# SHOW QUICK ACCESS TOOLBAR BELOW THE RIBBON

- The pop-up menu will give two options. The first, gives you the option to *Show Quick Access Toolbar Below the Ribbon*.
- Click on this option.

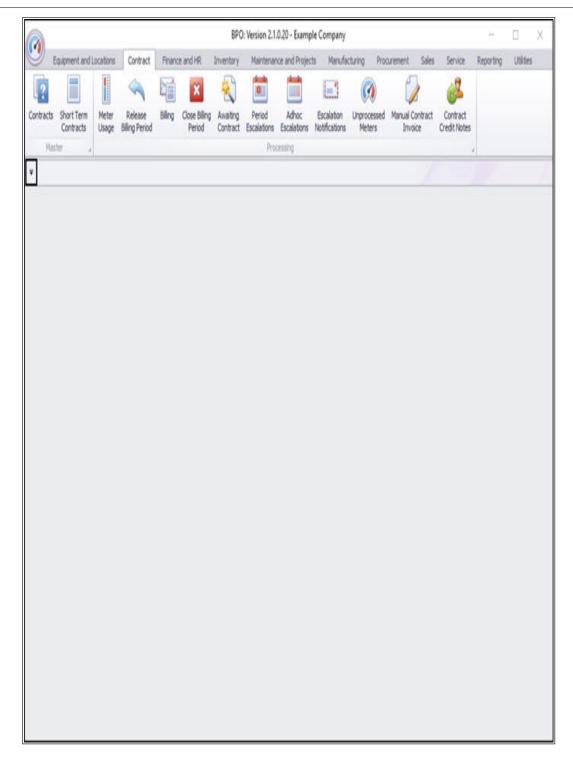




• The *Quick Access Toolbar* is now displayed *below* the Ribbon.



### BPO2 Quick Access Tool Bar





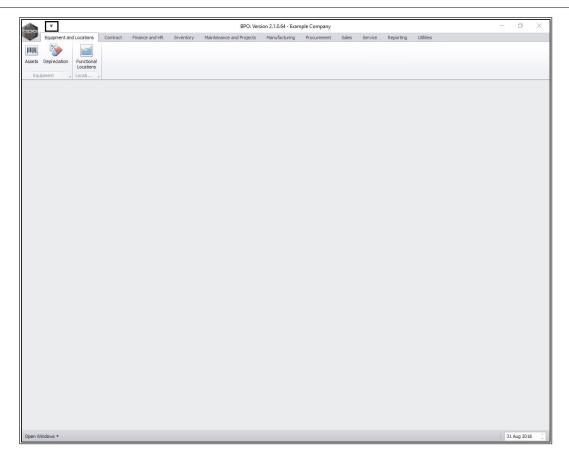
# SHOW QUICK ACCESS TOOLBAR ABOVE THE RIBBON

- To move it back to *above* the ribbon, click on the Quick Access Toolbar.
- In the drop-down menu displayed, select the Show Quick Access Toolbar Above the Ribbon option.

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• The icon will return to its original place *above* the ribbon.





#### **CUSTOMIZE THE RIBBON**

- Click on *Quick Access Toolbar* again to display the drop-down menu.
- Click on the second option: *Customise the Ribbon*.



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- The *Ribbon Customization* screen will pop up.
- For further information on this topic go the <u>Ribbon Configuration</u> manual.



## BPO2 Quick Access Tool Bar

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il Tabs	•	All Tabs			
<ul> <li>(Unassigned Pages)</li> <li>Equipment and Locations</li> <li>Contract</li> <li>Finance and HR</li> <li>Inventory</li> <li>Maintenance and Projects</li> <li>Manufacturing</li> <li>Procurement</li> <li>Sales</li> <li>Service</li> <li>Reporting</li> <li>Utilities</li> </ul>		<ul> <li>✓ Contract</li> <li>✓ Finance and HR</li> <li>✓ Inventory</li> <li>✓ Maintenance and Projects</li> </ul>			
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### **MINIMIZE THE RIBBON**

- *Right click* on the *Quick Access Toolbar* to re-open the pop-up menu.
- There will now be a third option, to *Minimize the Ribbon*.
- Click on this option.



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• The ribbon toolbar will be *minimized*, displaying the *main* ribbon tabs only.



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• To display the *full* ribbon option again, *right click* on the *Quick Access Toolbar*.

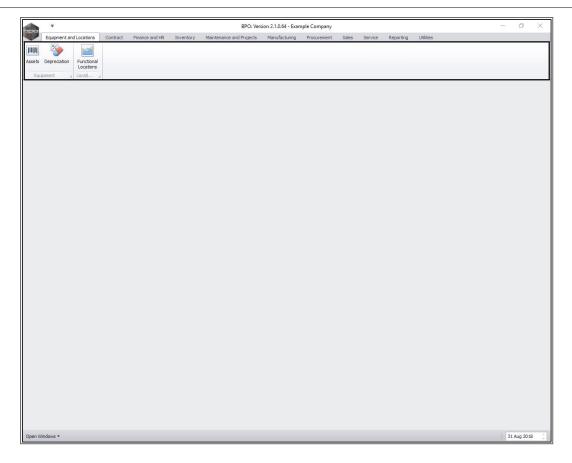


 You will see in the menu that the *Minimize the Ribbon* option is ticked. Click on this option to *un-tick* it.

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• The ribbon will display the ribbon toolbar again.



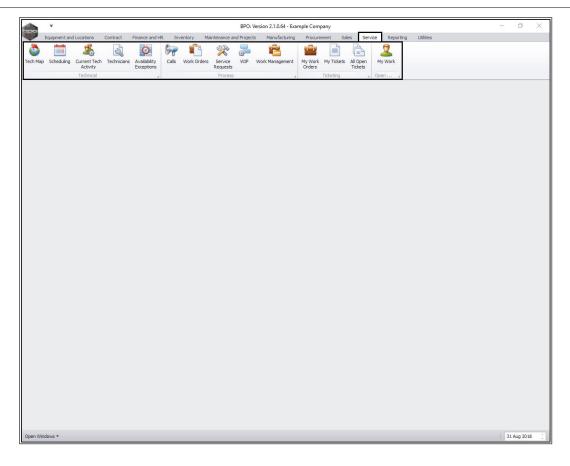


### **CUSTOMIZE THE QUICK ACCESS TOOLBAR**

#### ADD TOOLBAR BUTTONS

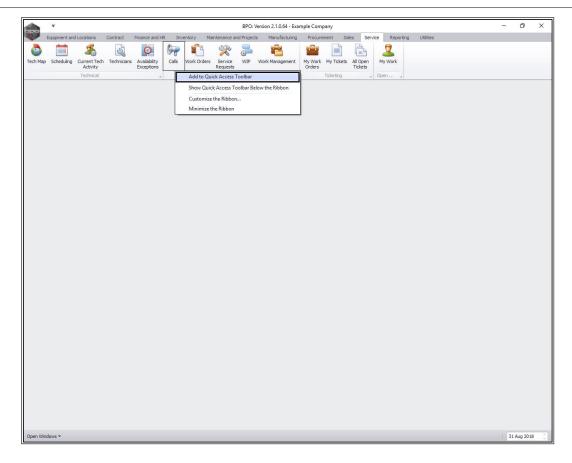
- Click on any one of the ribbon tabs where you wish to select a ribbon toolbar button.
  - In this image, the *Service* ribbon tab has been selected.





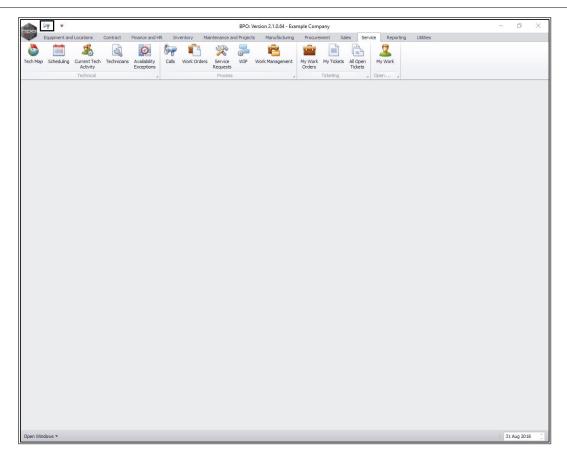
- *Right click* on any of the ribbon toolbar buttons that you wish to *add* to your quick access toolbar.
  - In this image the *Calls* button has been selected.
- From the pop-up menu, select *Add to Quick Access Toolbar*.





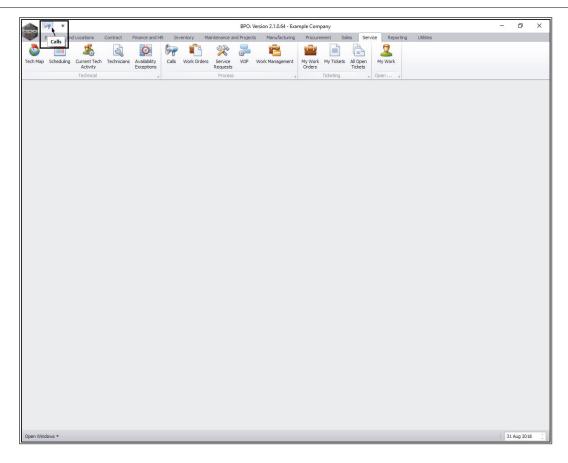
• The selected toolbar icon will now be displayed in the *Quick Access Toolbar*.





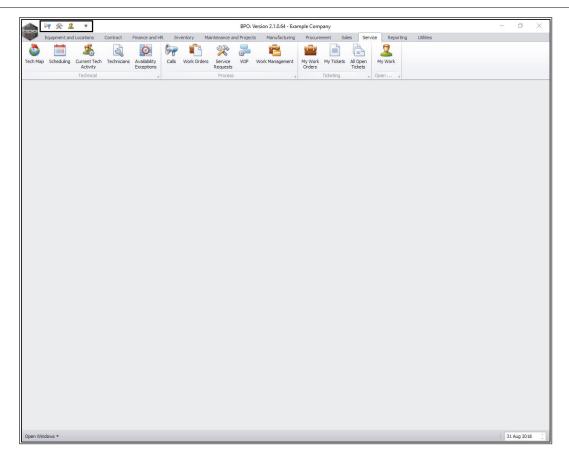
• *Hover over* the icon to display the toolbar button *name*.





- Continue adding selected icons in this way, until you have completed the *Quick Access Toolbar* customization to your satisfaction.
  - In this image, *Calls*, *Service Requests* and *My Work* have been added.



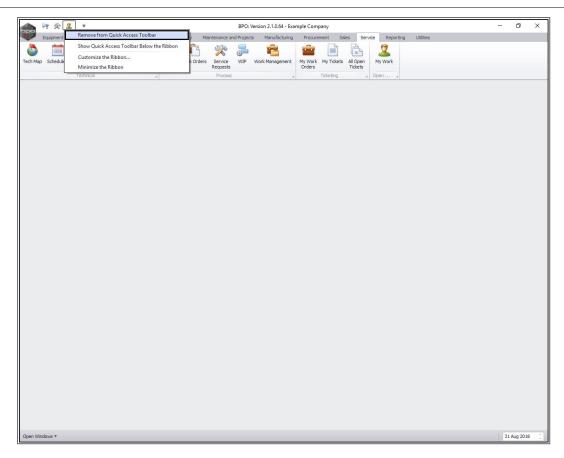


#### **REMOVE TOOLBAR BUTTONS**

You may wish to *remove* an icon from the *Quick Access Toolbar*.

- *Right click* on the icon.
- From the pop-up menu, select *Remove from Quick Access Toolbar*.

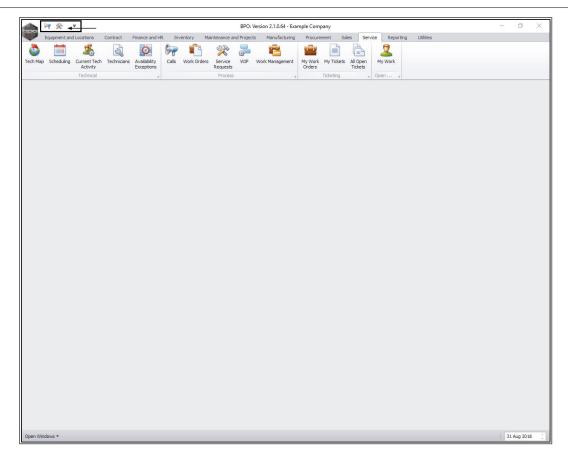




• The icon will be *removed*.

Help v2.5.0.14 - Pg 21 - Printed: 25/06/2024





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