

We are currently updating our site; thank you for your patience.

INTERFACE AND ENVIRONMENT

USING NUCLEUS SERVICE – 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 Nucleus Service interface.

A user may **relocate** it to be displayed either above or below the ribbon.

Ribbon Select: > Quick Access Toolbar Icon

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





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.

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Financial Periods	Debit Order Exchange Interest Rates													
	Finance	Human Resource	в											^
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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.



• 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.

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MINIMIZE THE RIBBON

• **Right click** on the **Quick Access Toolbar** to re-open the pop-up menu.

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- There will now be a third option to **Minimize the Ribbon**.
- Click on this option.



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



- 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 **untick** it.



• 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.

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

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

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• 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 Tool**bar.

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• The icon will be **removed**.



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