

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

## INTERFACE AND ENVIRONMENT

### USING NUCLEUS SERVICE – RIBBON CONFIGURATION

You can customize the **Nucleus Service** 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.

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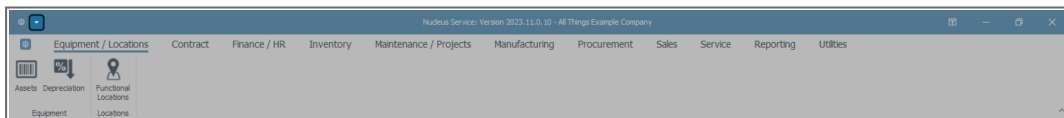
Ribbon Select: > Quick Access Toolbar Icon

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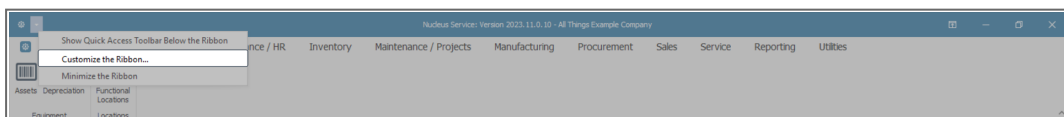
### RIBBON CUSTOMIZATION

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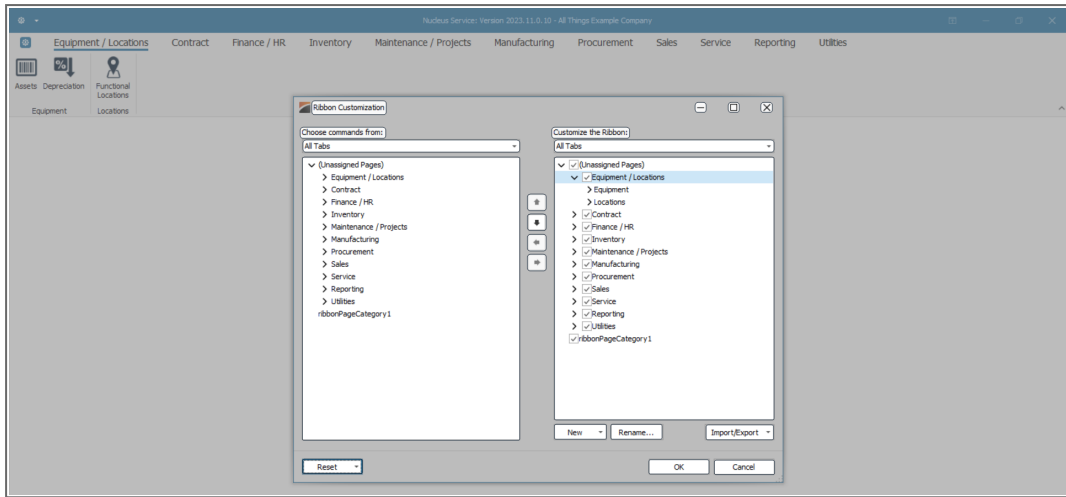
- Click on the **Quick Access Toolbar** icon.



- A pop-up menu will appear with an option to **Customize the Ribbon**.
- Click on this option.

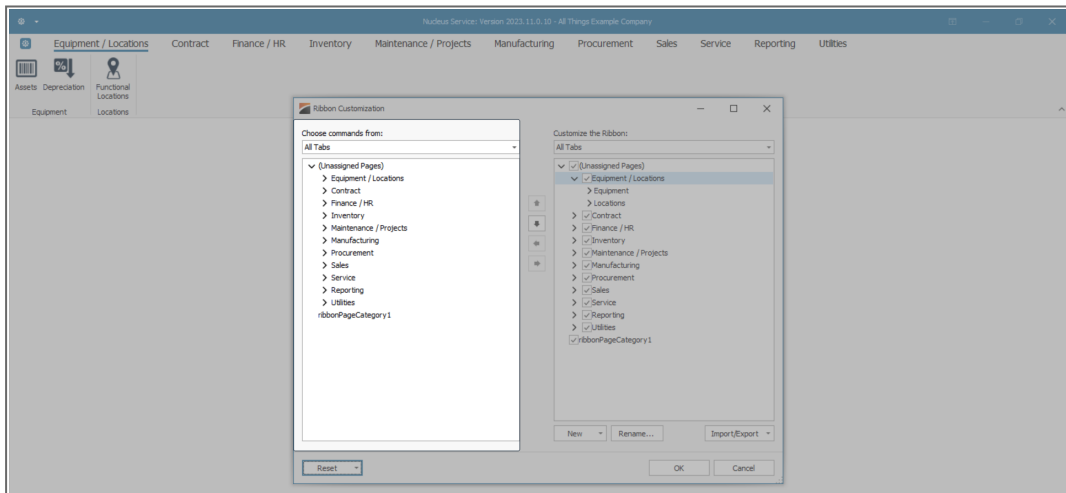


- The **Ribbon Customization** screen will be displayed.



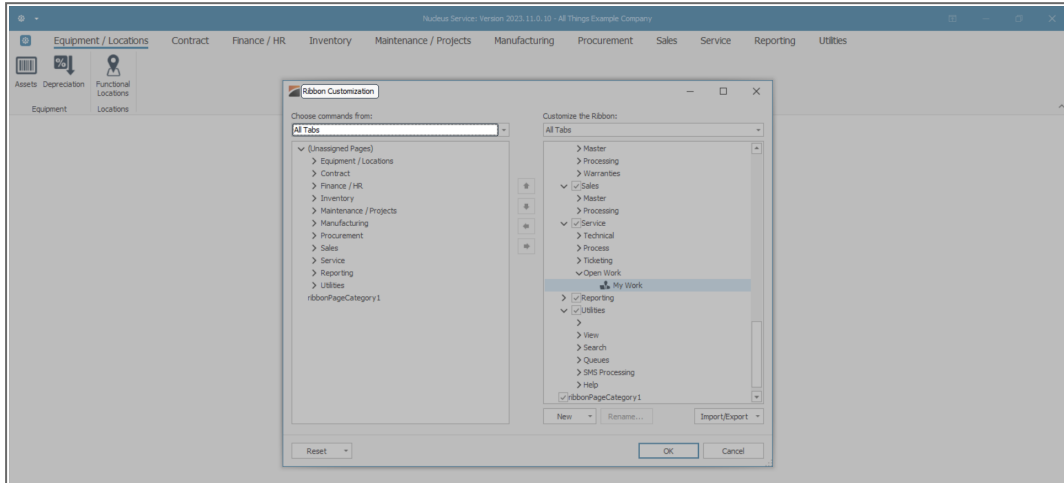
## CHOOSE COMMANDS FROM...

- 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 Nucleus Service.
- This list is static and reflects the way your Ribbon has automatically been configured on installation of Nucleus Service.

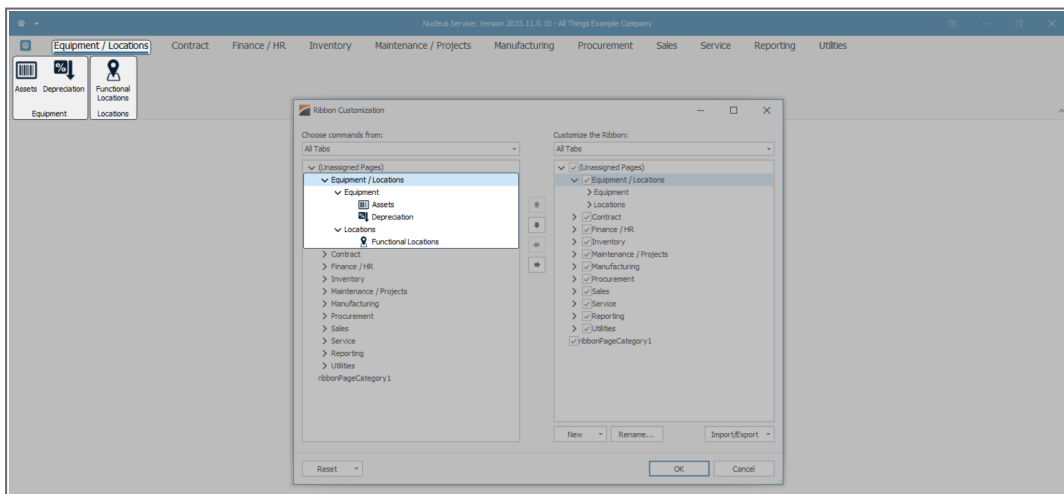


## ALL TABS

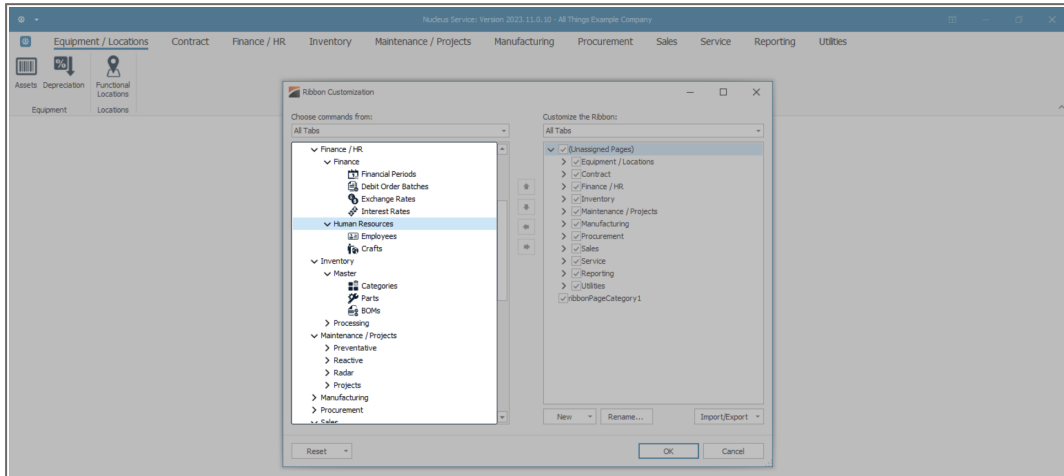
- In this **Choose commands from** menu you can view all the **Tabs** in the **All Tabs** list.



- 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.



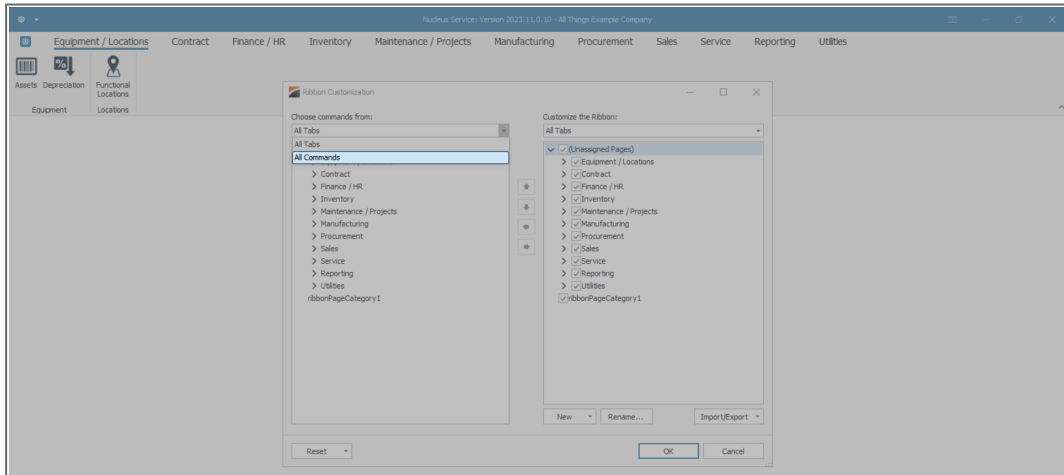
- The entire **All Tabs** list can be expanded to examine the contents.
- Use the scroll bar to peruse the **Tabs** and **Commands** that you may want to select for your customized Ribbon.



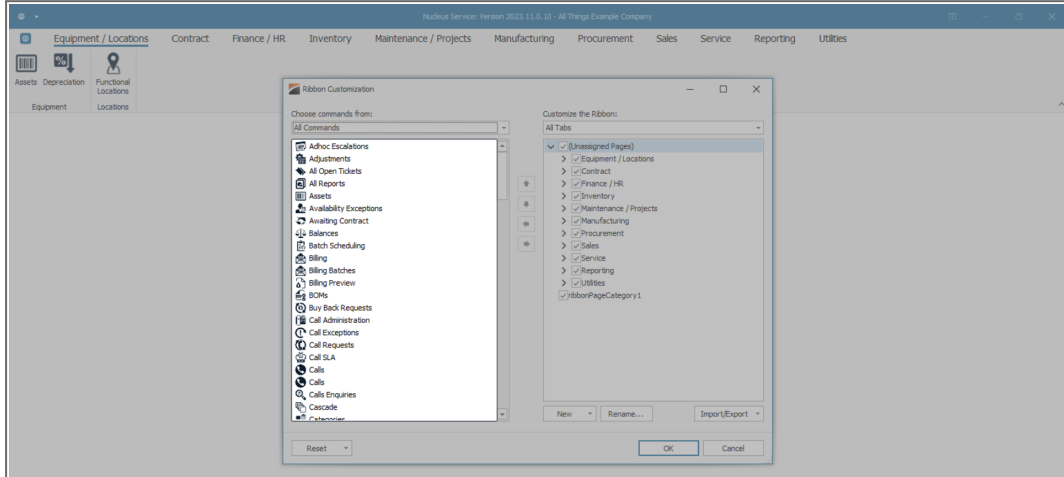
- Click on the **drop-down arrow** in the **All Tabs** row.
- A menu list will be displayed that gives two options - **All Tabs** and **All Commands**.

## ALL COMMANDS

- Click on the **All Commands** option.

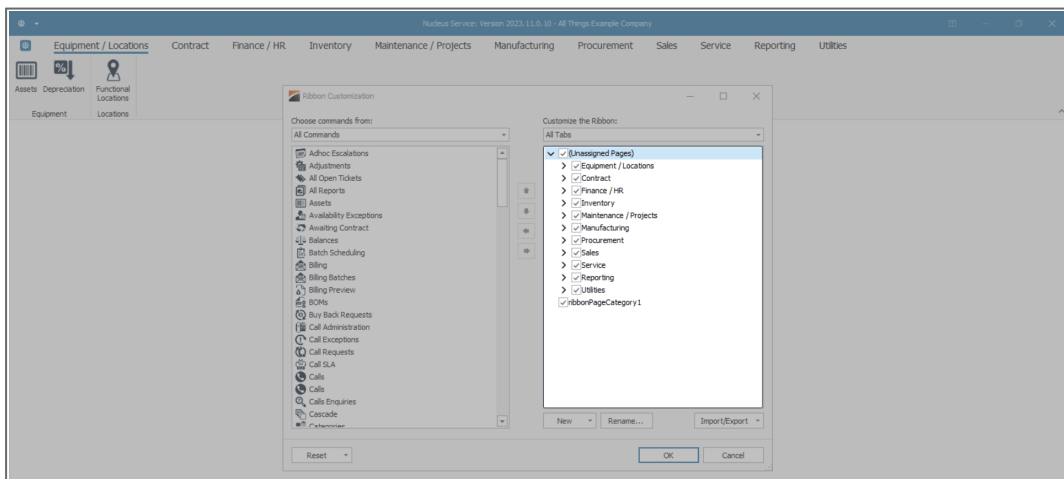


- Now an alphabetical list of all the **Commands** in Nucleus Service will be displayed.
- These **Commands** are all available to be added to any of the Tabs in your customized **Ribbon**.



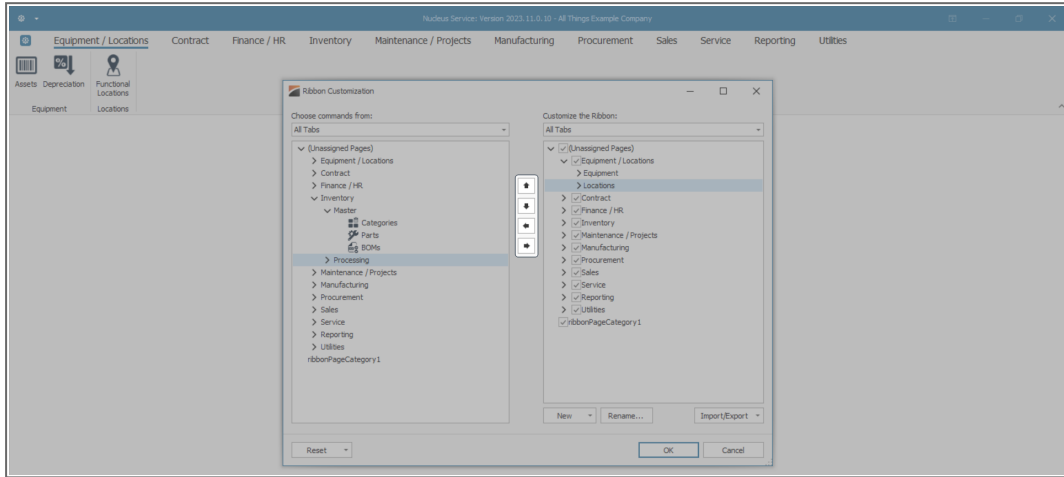
## CUSTOMISE THE RIBBON...

- 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.



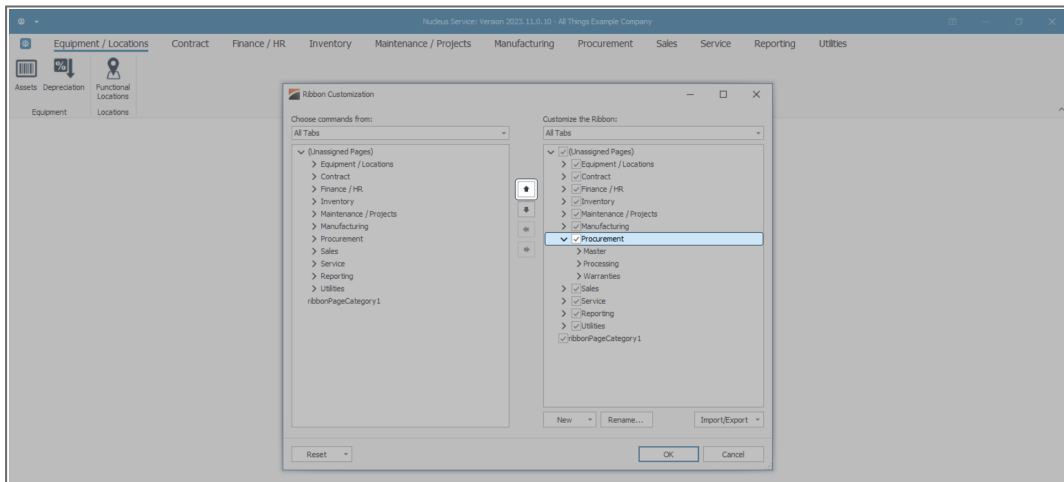
## CHANGE RIBBON ORDER

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

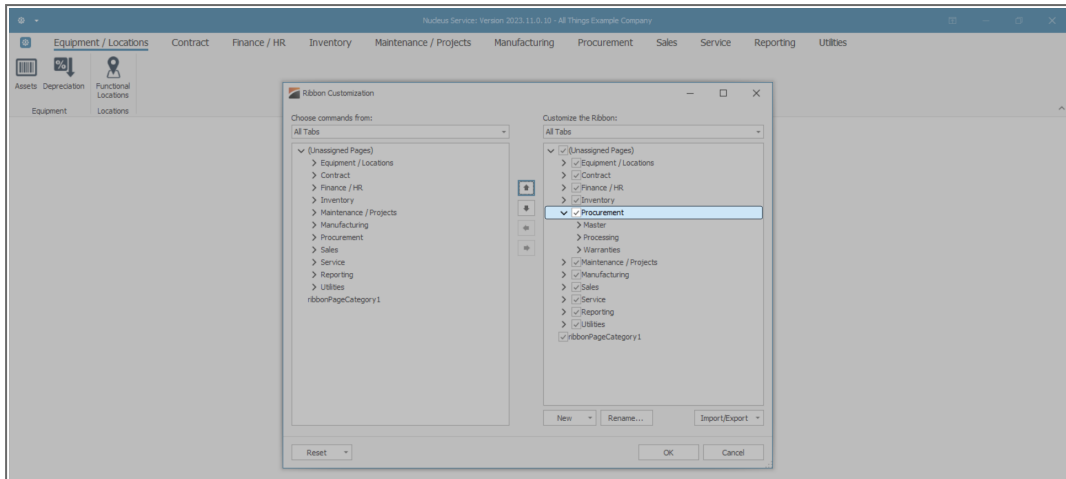


For Example :

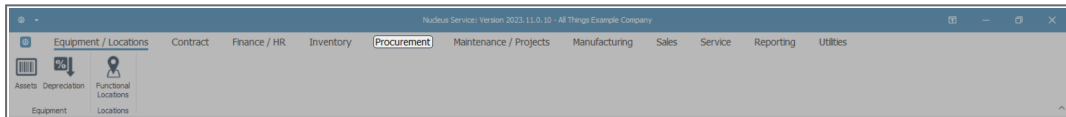
- In this image, **Procurement** has been selected.
- It is currently **7th** position in the list.
- Click twice on the **up arrow**.



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

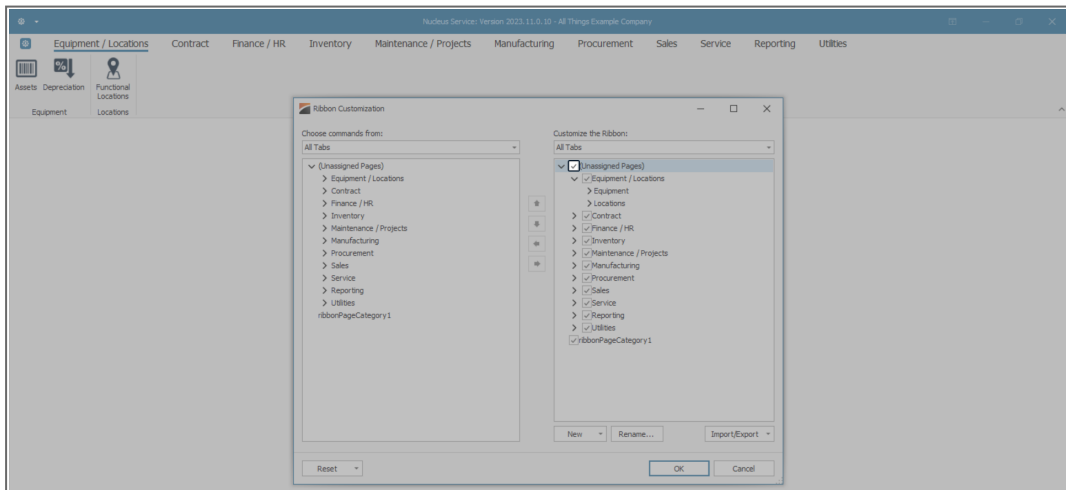


- When you have clicked **OK**, the changes will be saved and **Procurement** will now display **5th** instead of **7th** in the **Ribbon**.

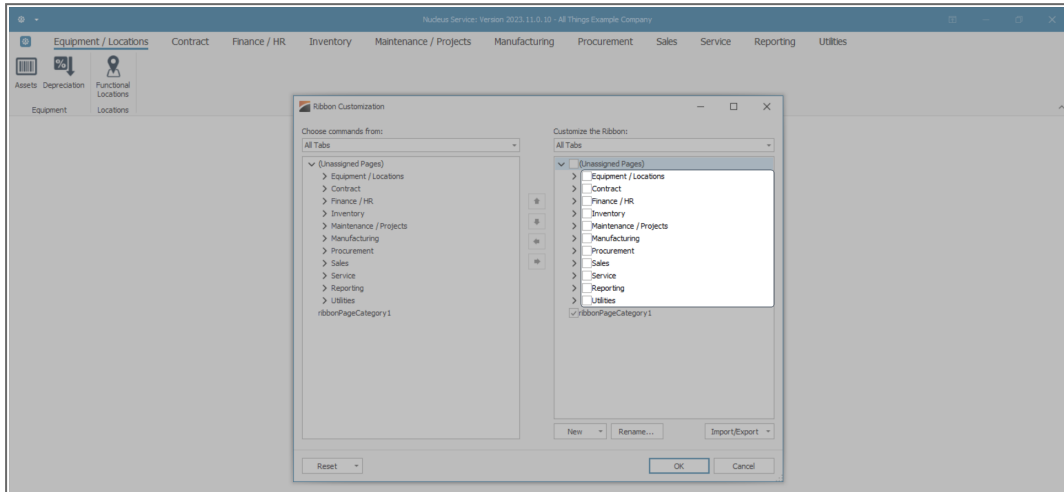


## CLEAR ALL CUSTOMIZATIONS

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



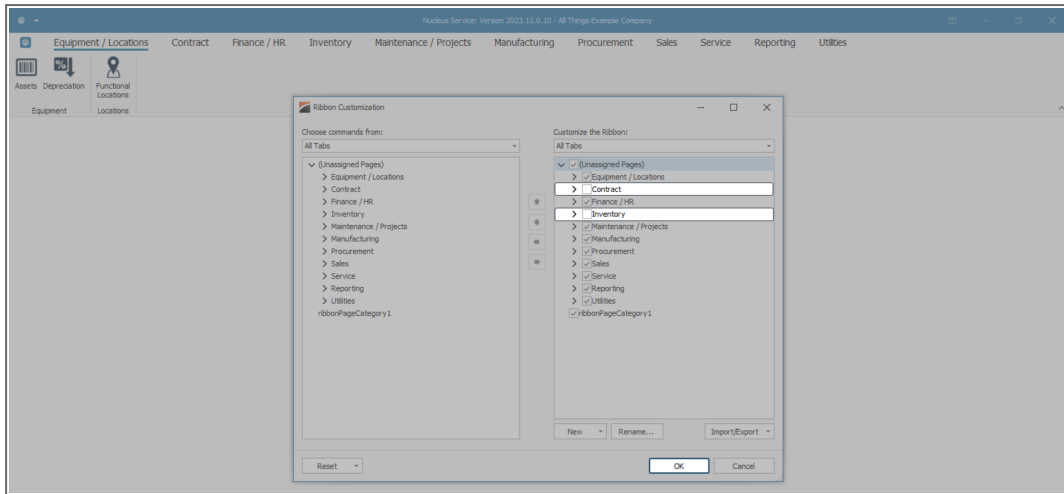
- This will clear all customizations for you to be able to start with a clear slate.
- Every one of the Ribbon Tab check boxes has been deselected.



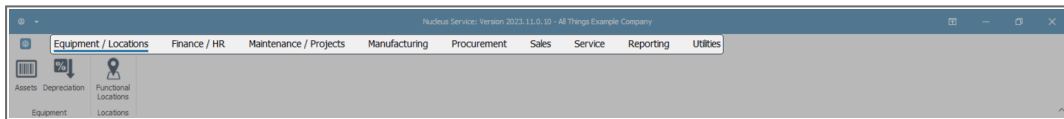
## SELECT SPECIFIC CUSTOMIZATIONS

- Alternatively, you can repopulate all the Ribbon Tabs by clicking again on the **Unassigned Pages** check box.
- Then select by unticking 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.



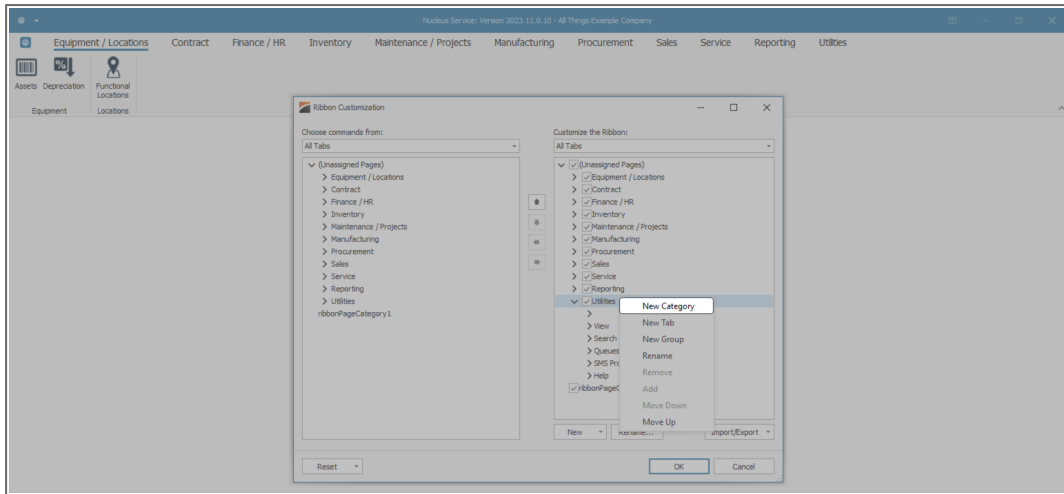


- Your **Ribbon** will now display the customizations that you have made.
- In this image, the **Contract** and **Inventory** Tabs are no longer displayed in the **Ribbon**.

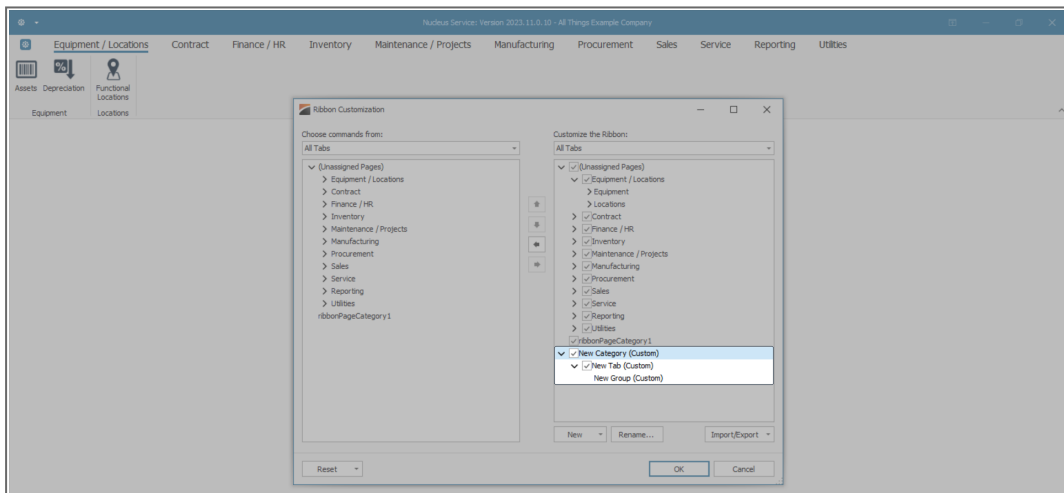


## ADD NEW CATEGORIES, TABS AND GROUPS

- You can add **New Categories**, **New Tabs** and **New Groups** to your Ribbon.
- **Right click** on any Tab in the list.
- In this image, the **Utilities** Tab has been selected.
- The pop-up menu will be displayed.
- Click on **New Category**.

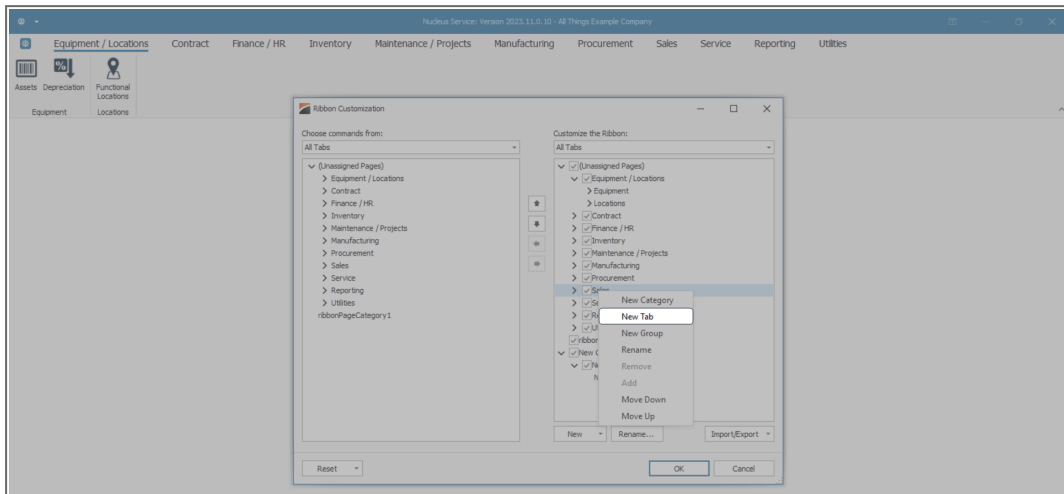


- A **New Category** has been added to the list.
- The system automatically adds a **New Tab** and a **New Group** within a new Category.
- The **New Category**, **New Tab** and **New Group** have **(Custom)** after their titles to let you know that they are your customized additions to the list.

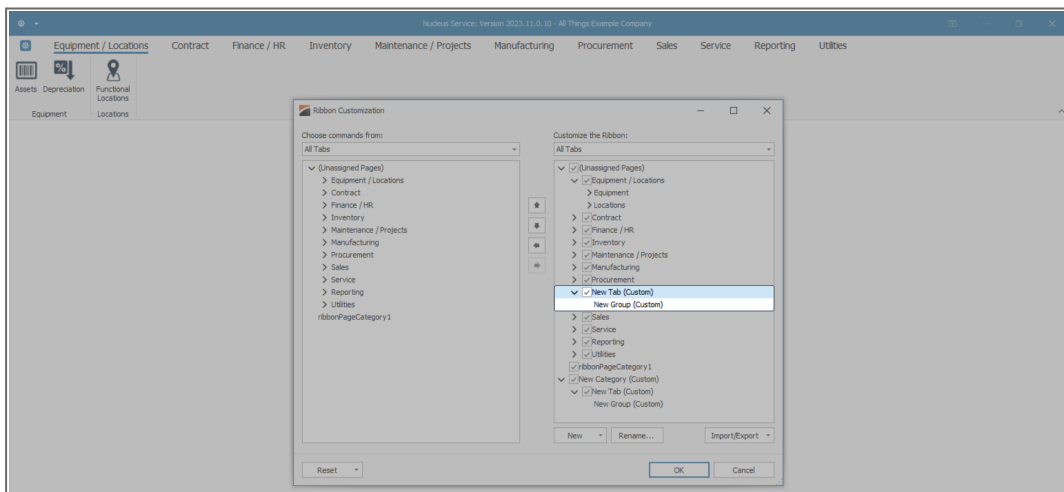


- You can also add a **New Tab** without creating a **New Category**.
- **Right click** on any Tab in the list.
- In this image the **Sales** Tab has been selected.

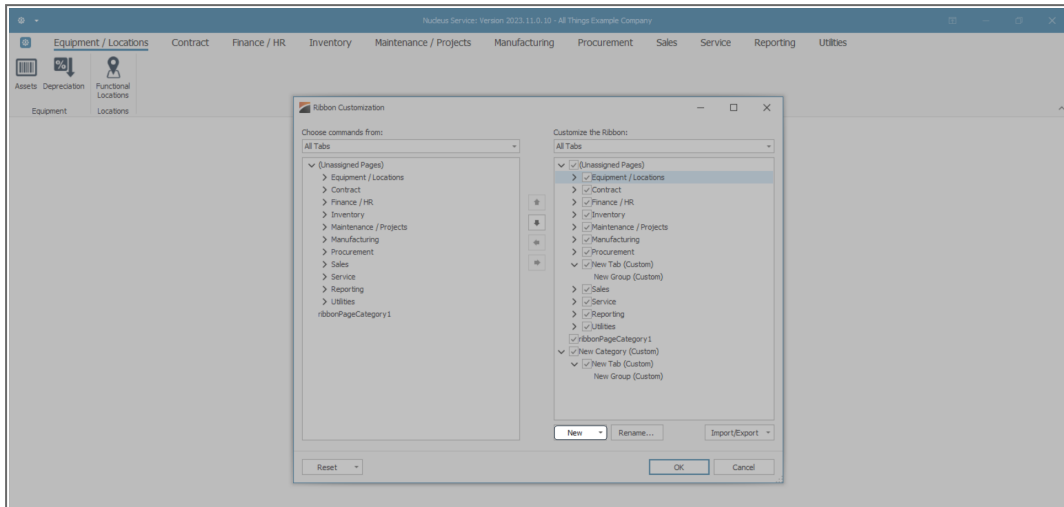
- The pop-up menu will be displayed.
- Click on **New Tab**.



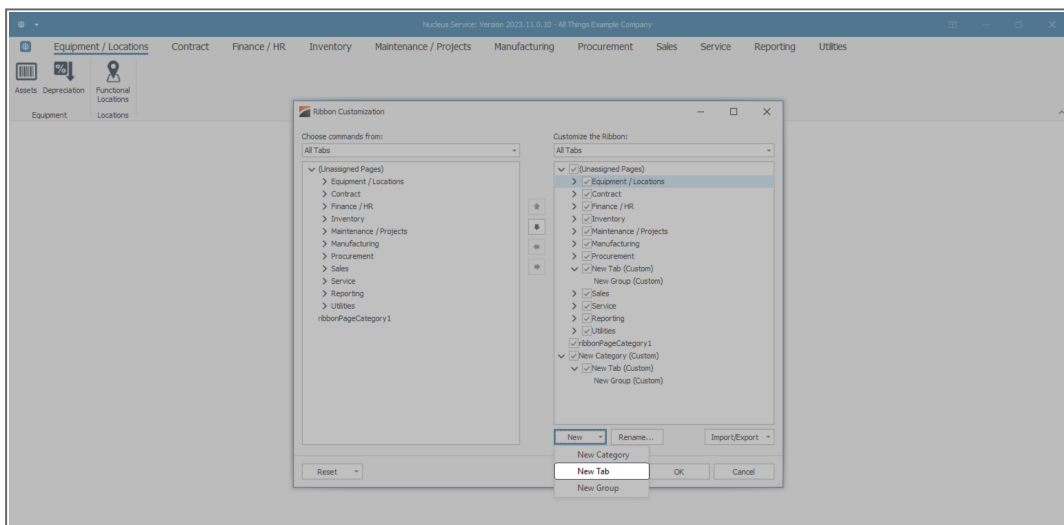
- A **New Tab** (and automatically a **New Group**) has been added to the Customized list.
- The **New Tab** has been positioned above the Tab you selected but this position can be altered, as explained, by using the **arrows** in the centre of the screen, or by selecting the **Move Up** or **Move Down**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

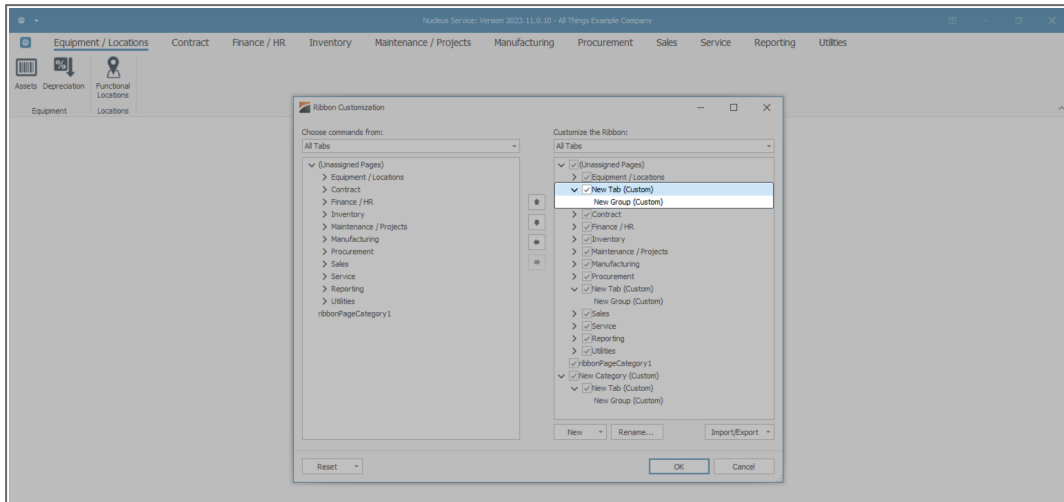


- Click on **New** and select from the drop-down menu.
- In this image, **New Tab** has been selected.



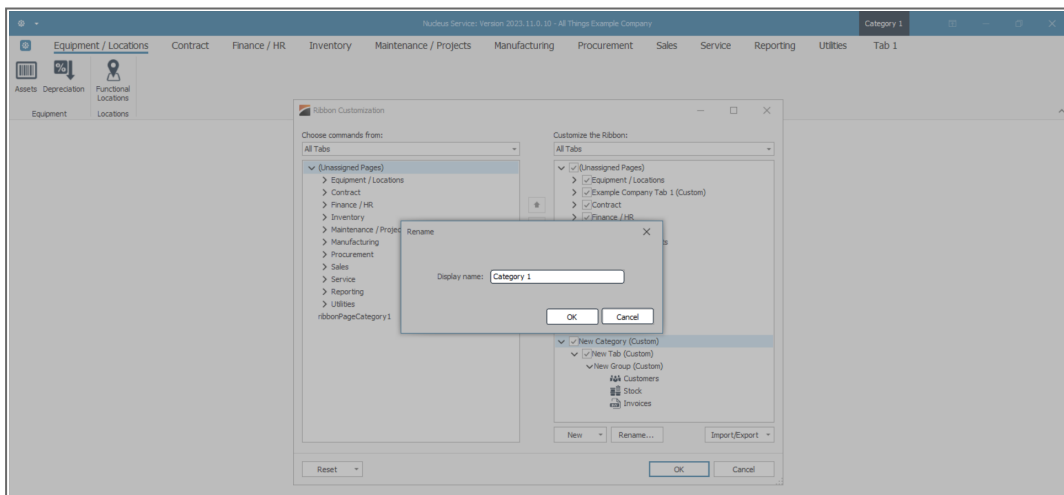
- A **New Tab** (and automatically a **New Group**) has been added to the Customized list.
- When you add using the **New** button then your additions are placed **below** the Tab that you had highlighted before you clicked on **New**.

- In this image, the **New Tab** (and **New Group**) were added below the highlighted **Equipment and Location** Tab.

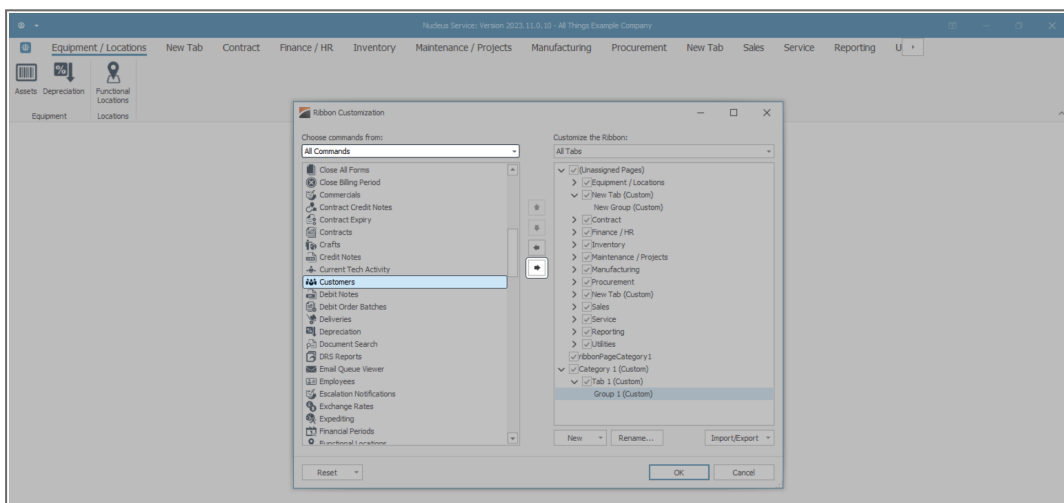


## ADD COMMANDS TO A GROUP

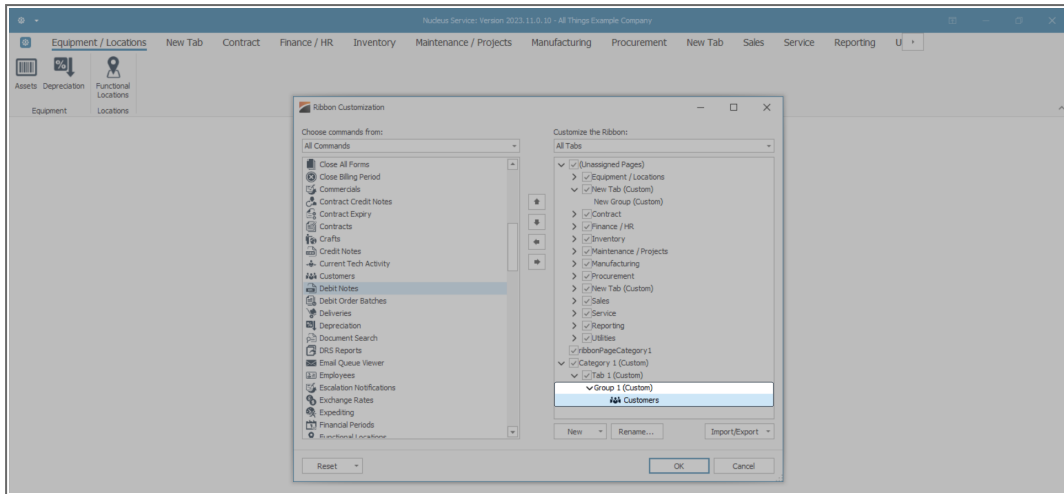
- All Categories and All Tabs can be renamed but **New Groups** can be renamed **and** have any **Commands** added to them.
- Select a **Group** to add a **Command** to.
- In this example, **Group 1** has been selected.



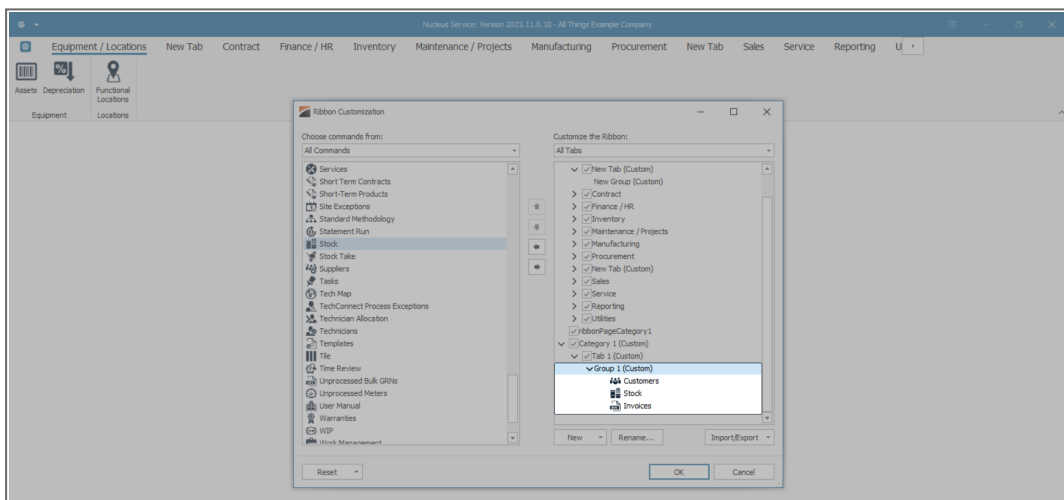
- Open the **All Commands** list on the left side of the screen.
- Use the scroll bar to search through the list.
- Click on the **Command** that you want to add to the selected **Group**.
- In this image **Customers** has been selected from the **All Commands** list.
- The right directional arrow has now been activated in the arrow list in the middle of the screen.
- Click on this arrow to copy the selected **Command** to the selected **Group**.



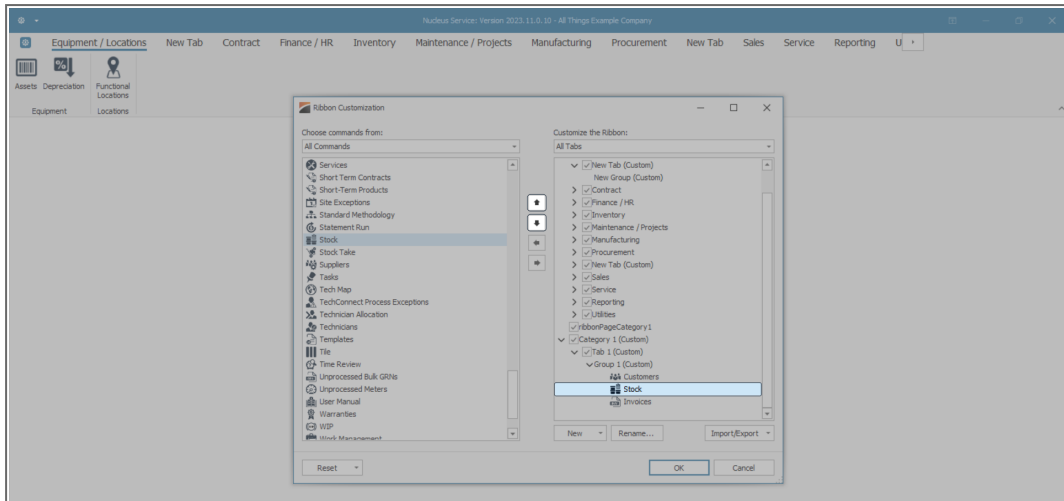
- In this image, the **Customers** Command has now been added to **Group 1**.



- You can add as many Commands as you want to 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**.

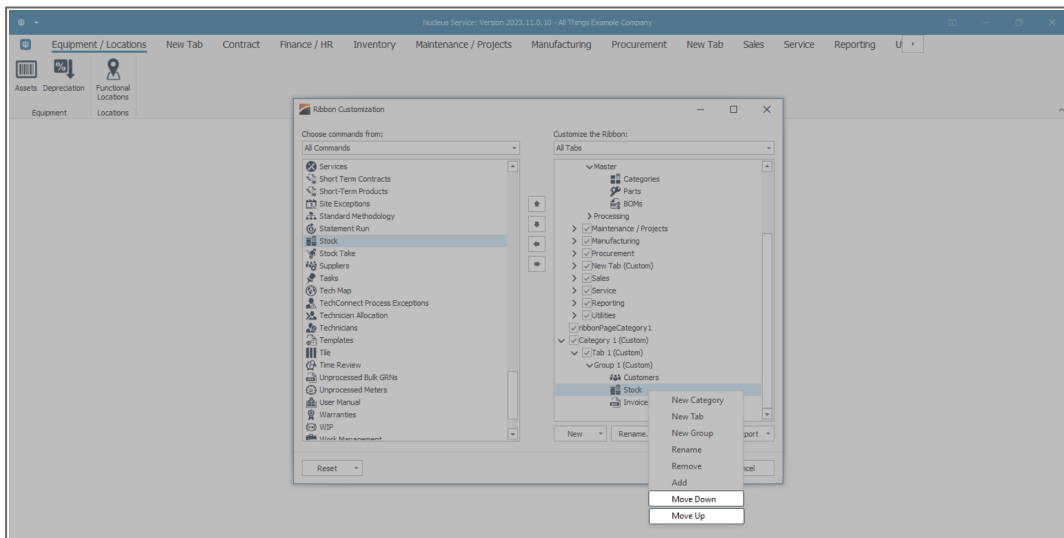


- This list of **Commands** can be re-ordered within a **Group** according to your preference using the **arrows** in the centre of the screen.



## CHANGE THE ORDER OF COMMANDS

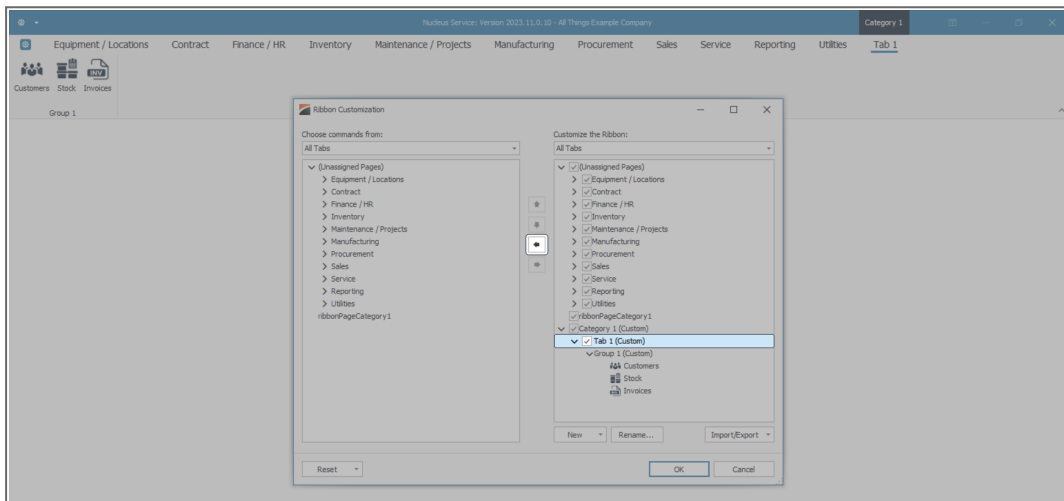
- You can also change the order of a **Command** within a **Group** by clicking on that **Command** to highlight it.
- Now **right click** to display the pop-up menu.
- In this image, we have highlighted the **Stock** Command.
- Select the **Move Up** or **Move Down** option to change the order of the selected Command.



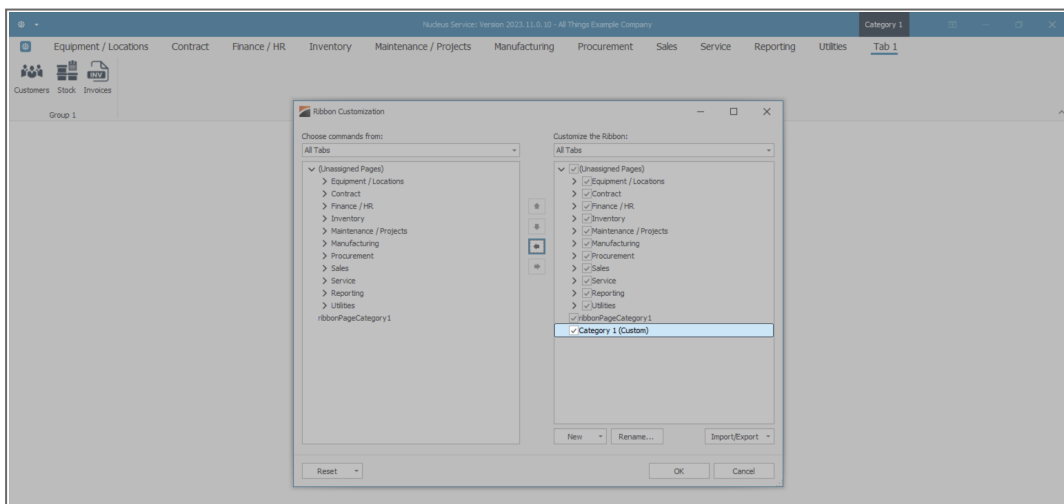


## REMOVE CATEGORIES, TABS, GROUPS AND COMMANDS

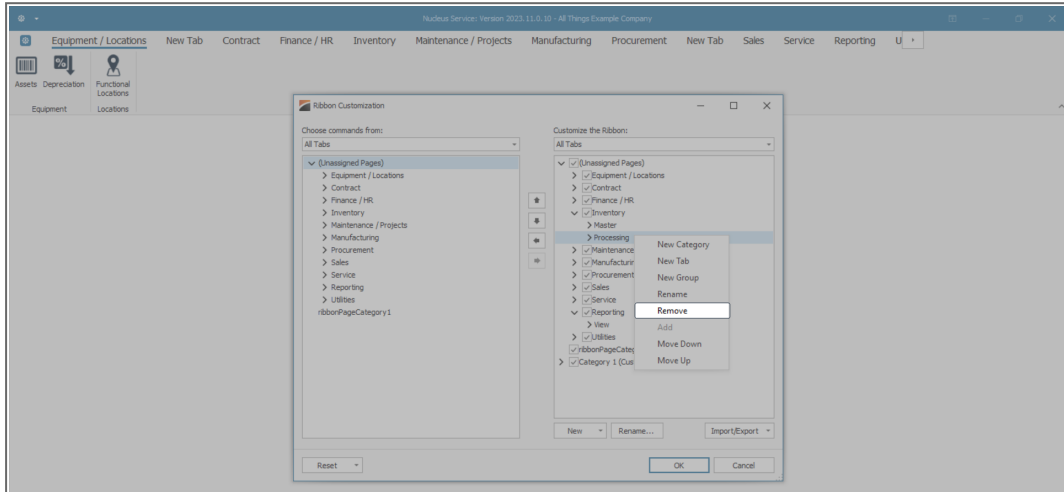
- Click on the Category, Tab, Group or Command you wish to remove from the Ribbon Tab Customization list.
- In this image, we have highlighted **Tab 1**.
- The left directional arrow in the middle of the screen will now be activated.
- Click on this arrow to remove the highlighted selection.



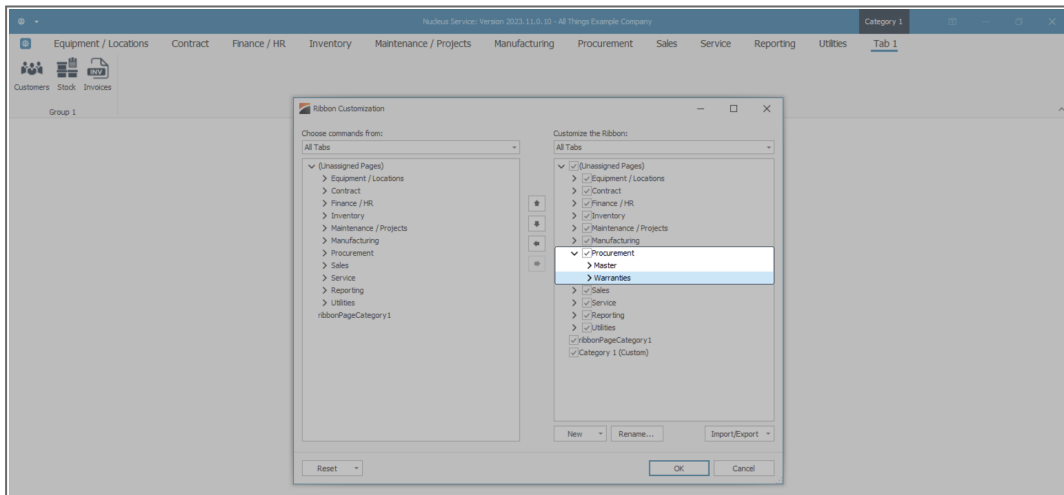
- **Tab 1** Ribbon Tab has now been removed from the Customization list.



- Or you can **right click** on the Category, Tab, Group or Command **Command** (or a **Tab**) you wish to remove from the Ribbon Tab Customization list.
- In this image, we have right clicked on the **Processing** Ribbon Tab.
- On the pop-up menu, click on **Remove**.

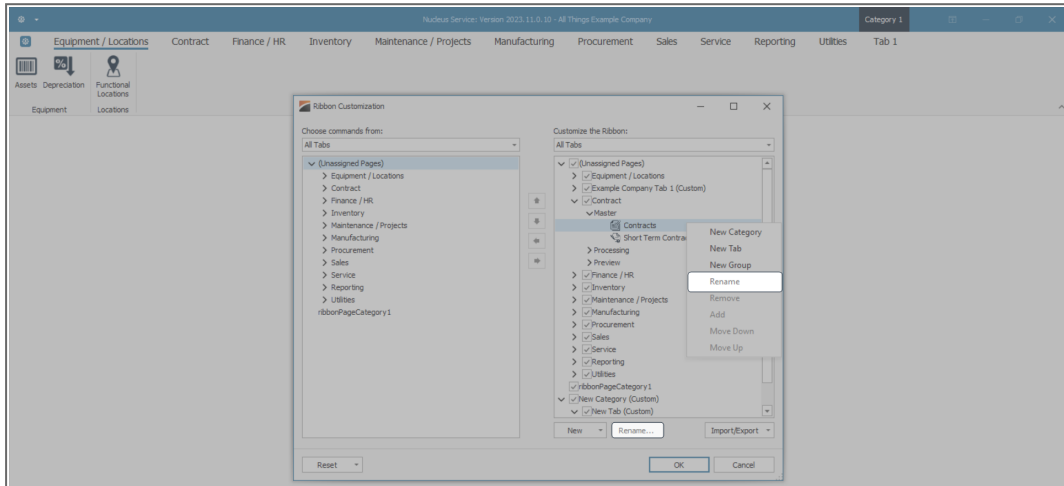


- In this image, the **Processing** Ribbon Tab has now been removed from the Customization list.



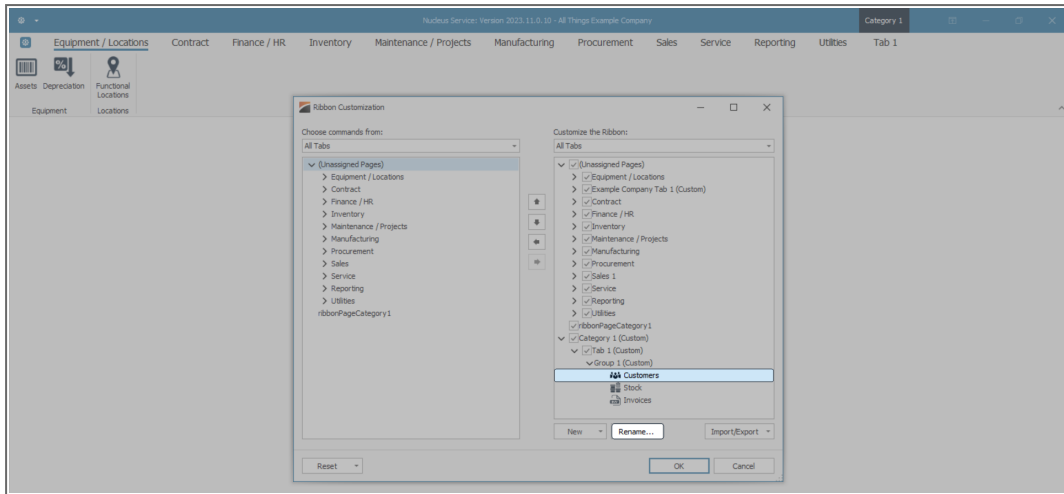
## RENAMING

- You have two options to rename each of these new customizations and existing Ribbon Tabs.
- If **Rename** is **feint**, it indicates that the Title cannot be renamed.

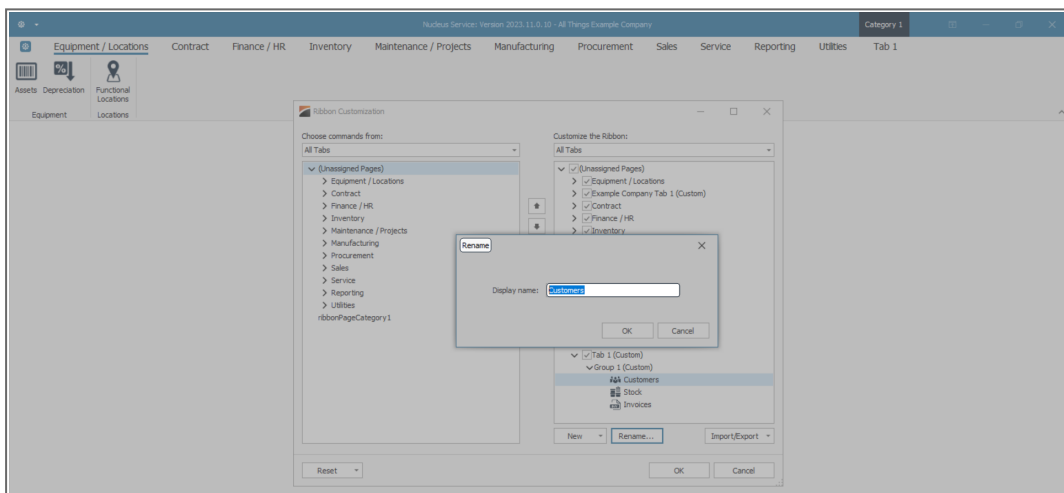


### Method 1

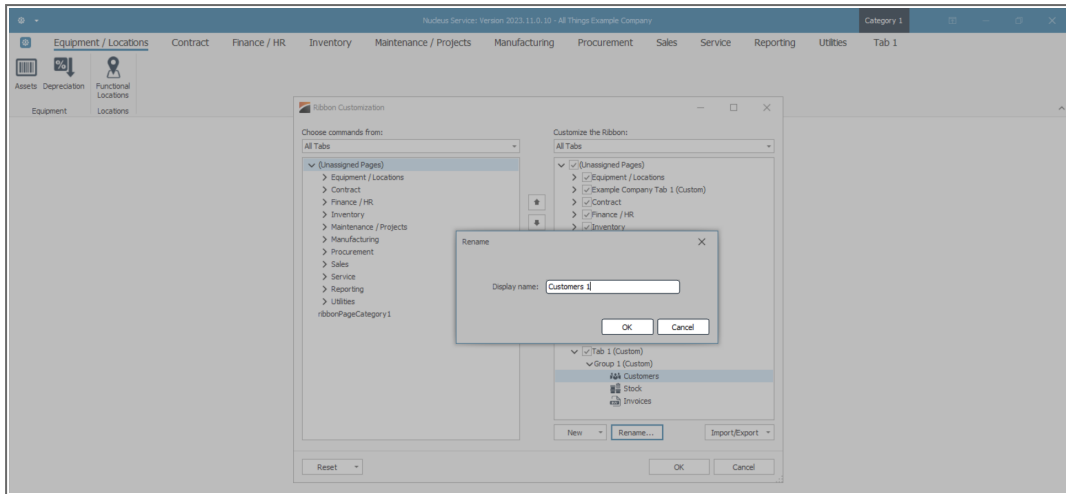
- Select the Title you wish to **Rename**.
- Click on the **Rename** button at the foot of the **Customize the Ribbon** frame.
- In this image, a new **Command**, 'Customers', has been selected (highlighted).
- Click on **Rename**.



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

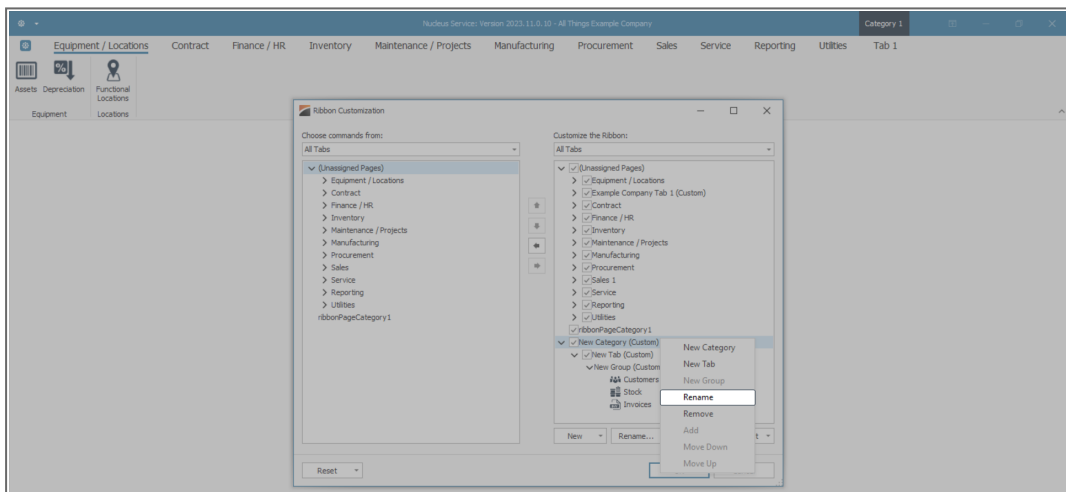


- In this image, the title **Customers 1** has been typed.
- Click on **Ok** to save your name change.
- Or **Cancel** if you do not want to save the new name.

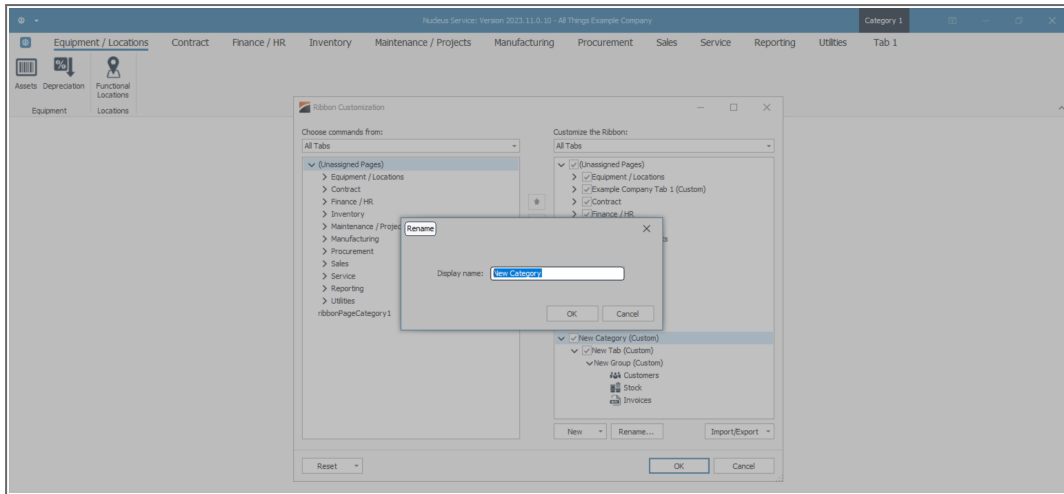


## Method 2

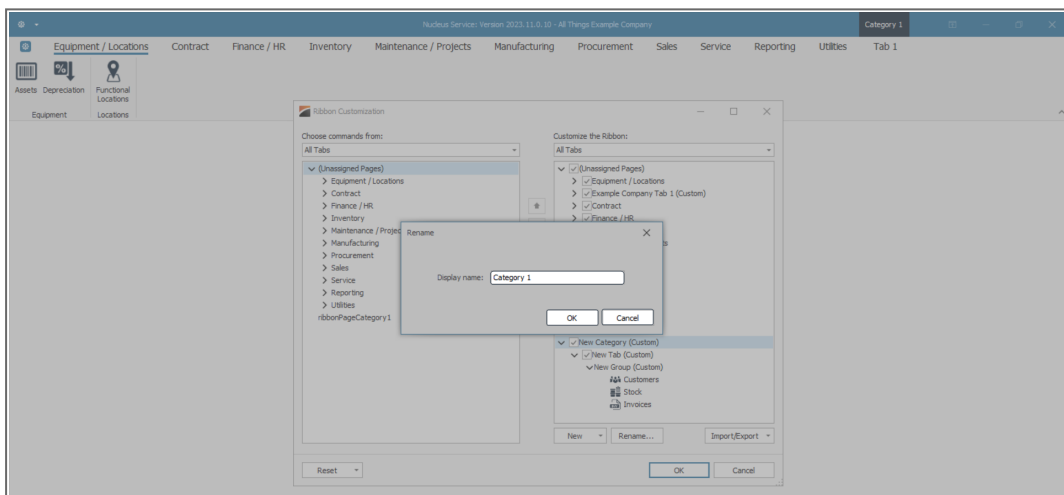
- **Select** and **right click** on the Title you wish to rename.
- In this image, **New Category** has been selected (highlighted).
- Click on **Rename** in the pop-up menu.



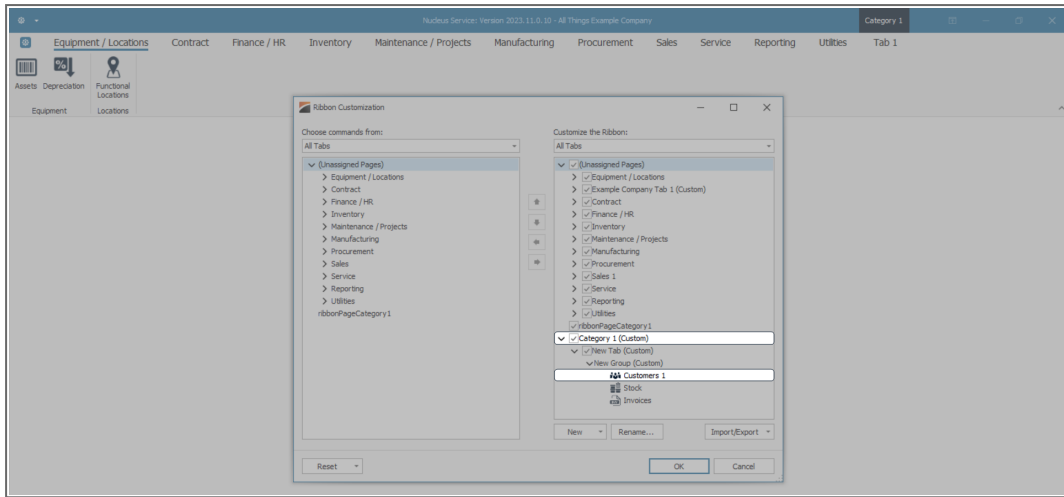
- A **Rename** pop-up screen will appear.
- The **Display name:** cell auto populates with the original name.
- Type your name of choice over the highlighted wording in this cell.



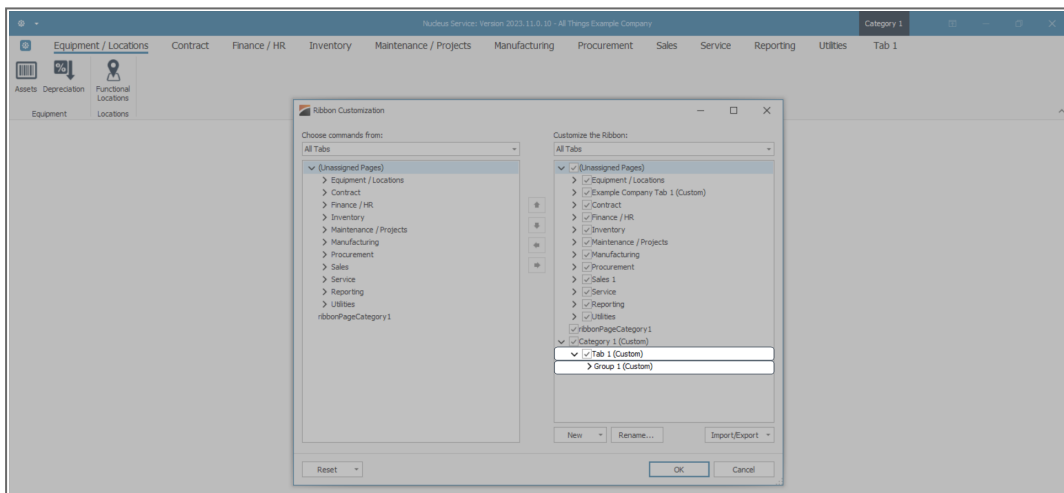
- In this image, the Title **Category 1** has been typed.
- Click on **Ok** to save your name change.
- Or **Cancel** if you do not want to save the new name.



- If you have clicked **Ok**, your **Title** will be renamed and saved.
- In this image, the new Titles are displayed in the **Customize the Ribbon** list.



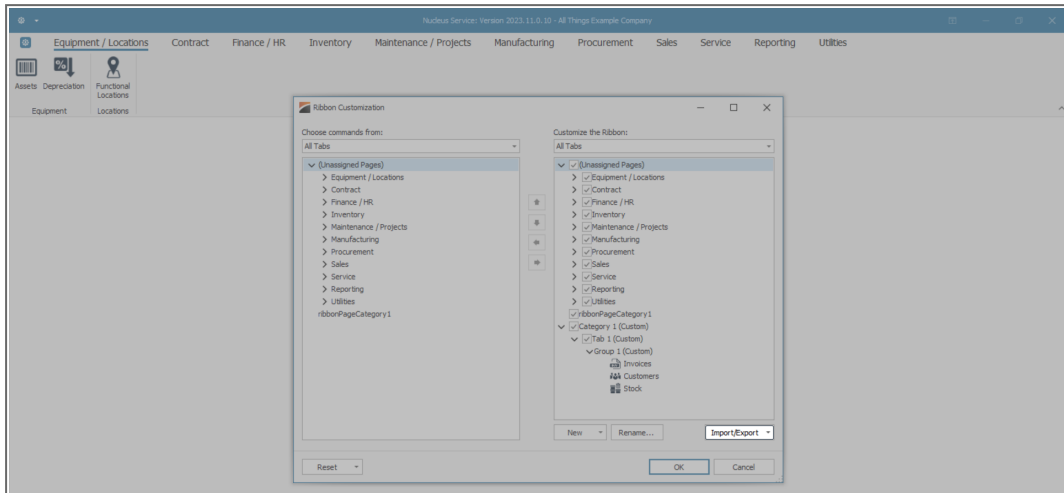
- Follow the same procedure to rename the **New Tab** and **New Group** Categories.
- In this image they have been renamed **Tab 1** and **Group 1** respectively.



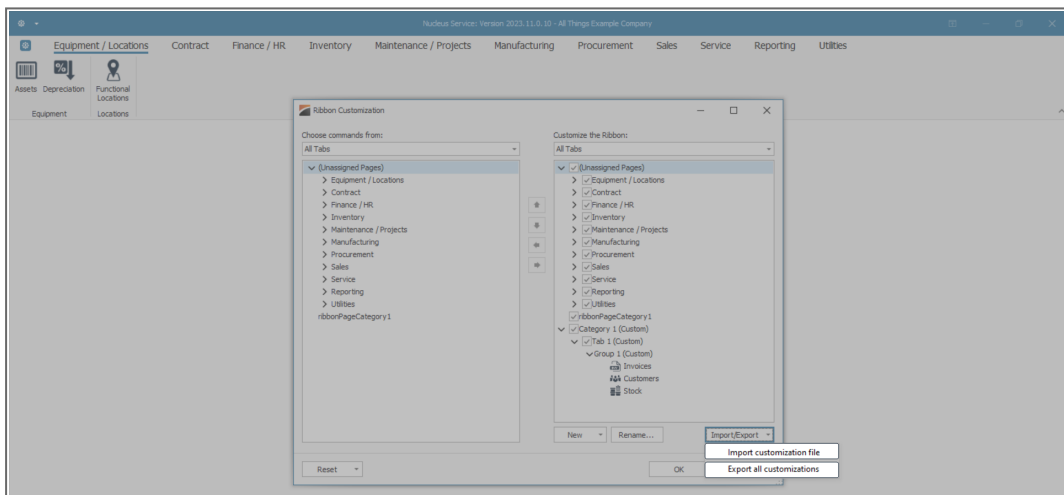
## IMPORT / EXPORT CUSTOMIZATIONS

- You have the option to **Import** a customization file or **Export** all your customizations.

- Click on **Import/Export** at the foot of the **Customize the Ribbon** frame.



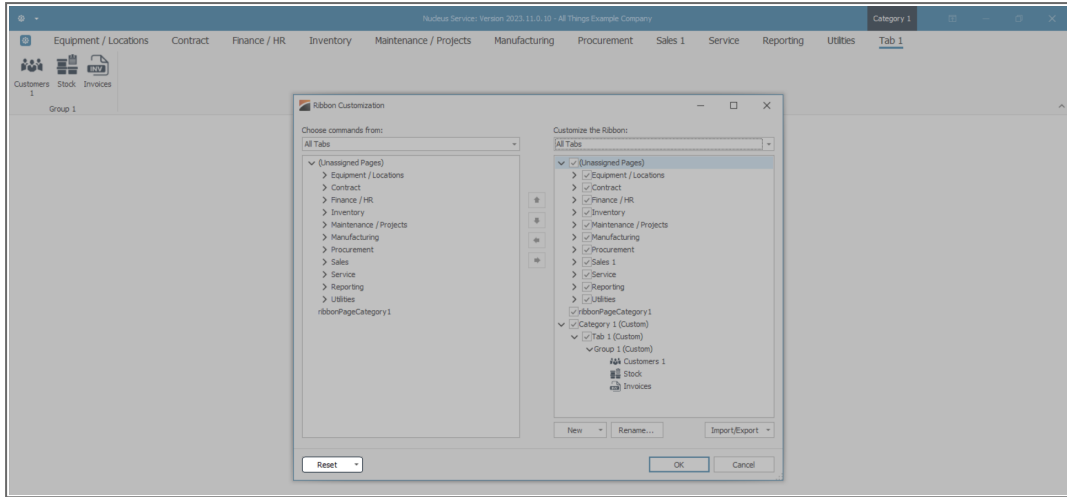
- A drop-down menu will display to select **Import customization file** or **Export all customizations**.



## RESET CUSTOMIZATIONS

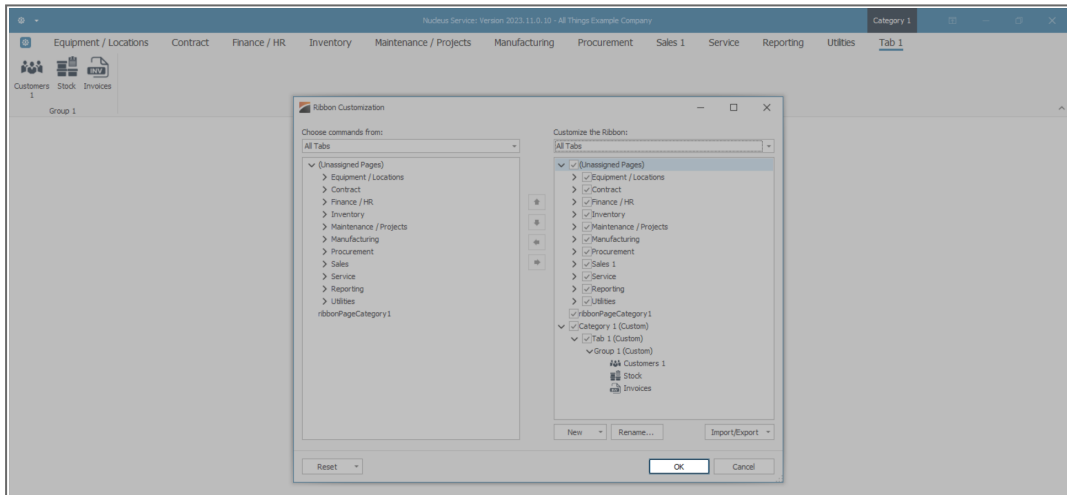
- If you do not want to save your customizations, you can click on **Reset** to return to the original Ribbon configuration.





## SAVE CUSTOMIZATIONS

- If you want to save your customizations, you can click on **OK** to save your changes.



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



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