

INTERFACE AND ENVIRONMENT

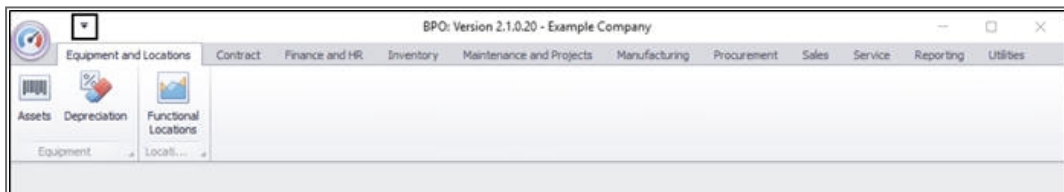
USING BPO – RIBBON CONFIGURATION

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.

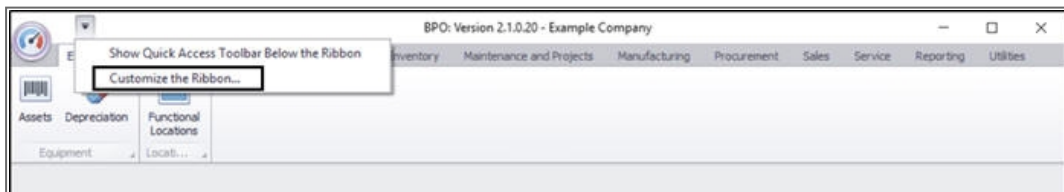
Ribbon Access: *Quick Access Toolbar > Customize the Ribbon*

RIBBON CUSTOMIZATION

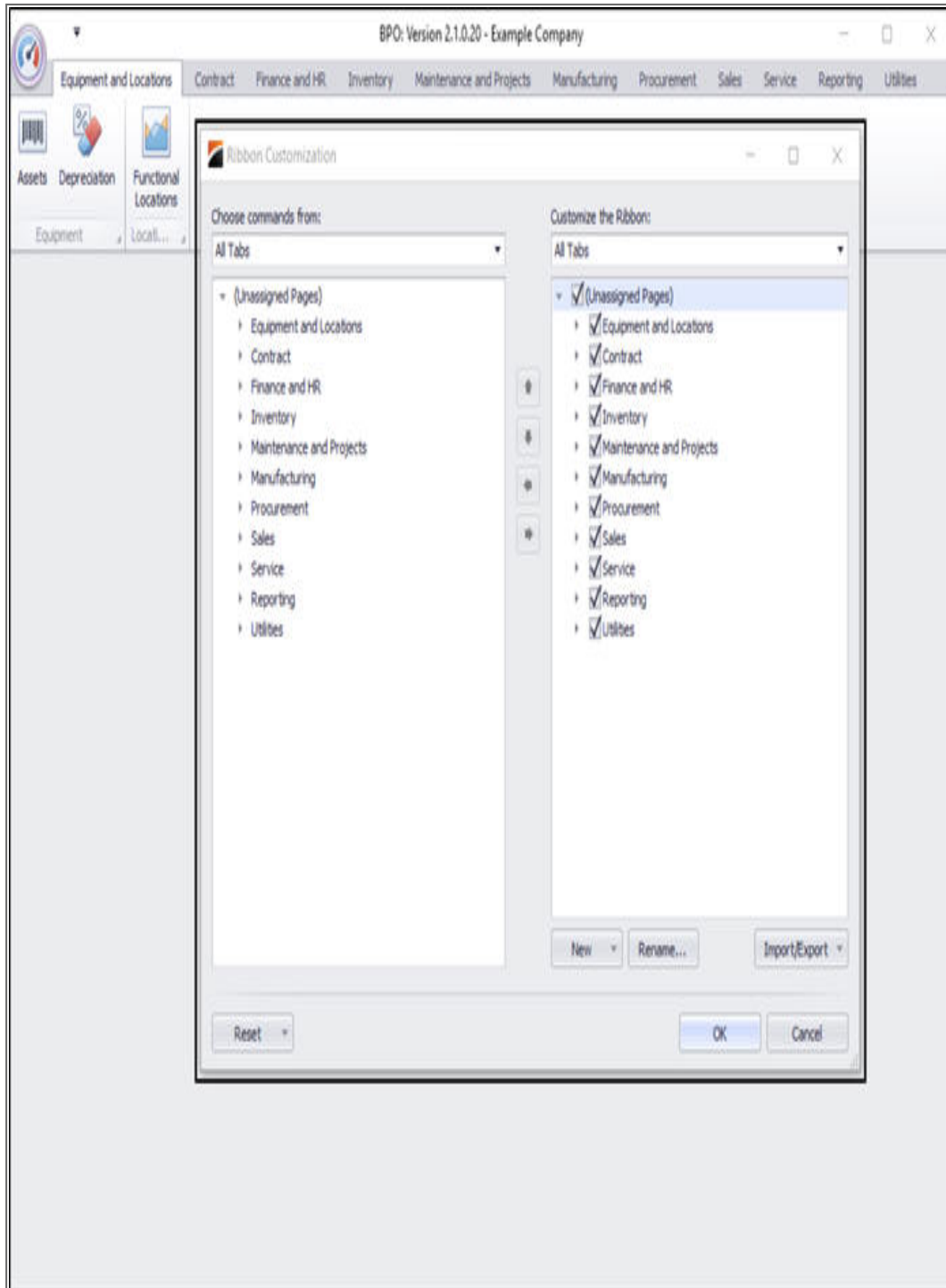
- Click on the **Quick Access Toolbar** icon.



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

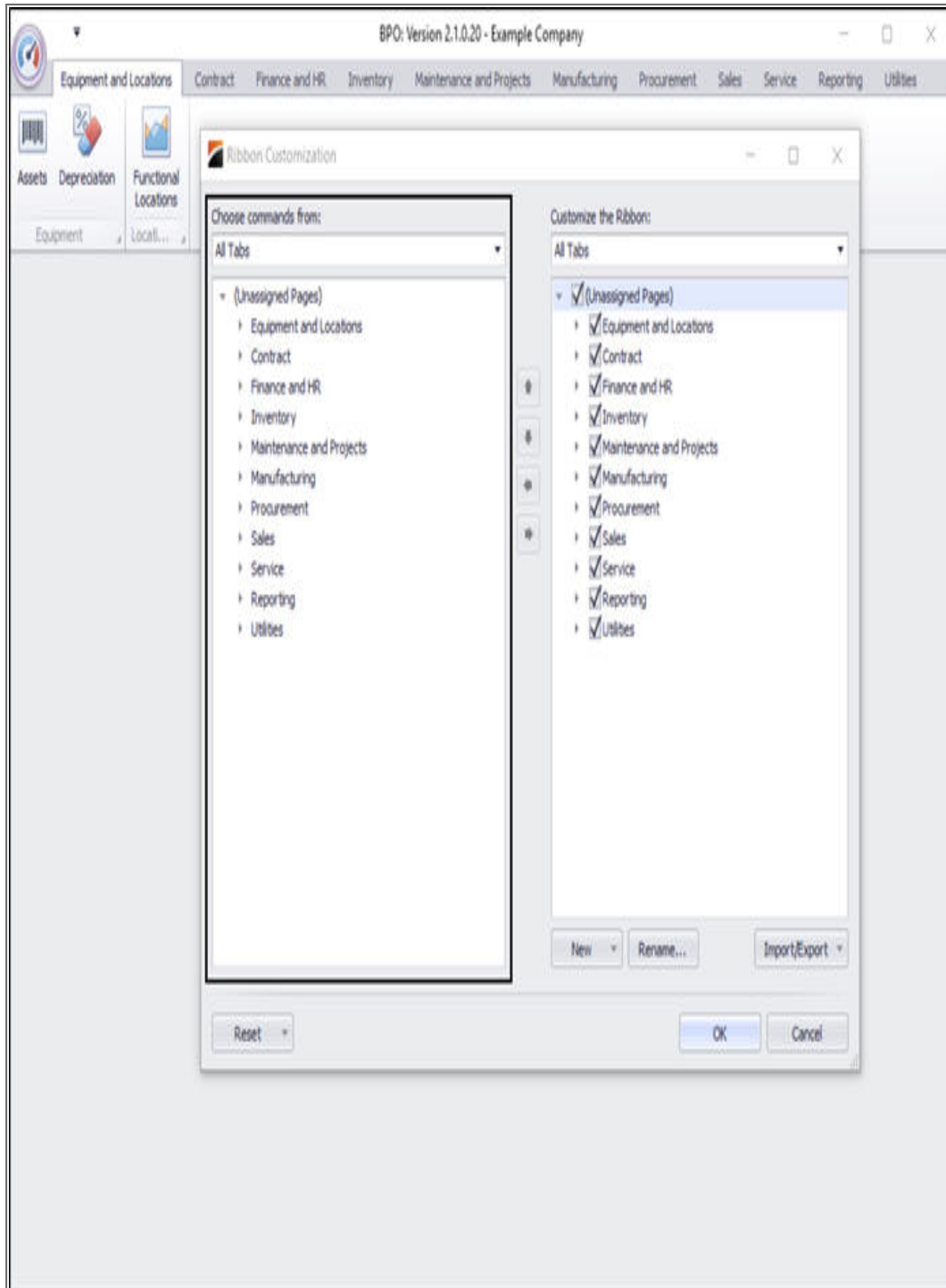


- The **Ribbon Customization** screen will be displayed.



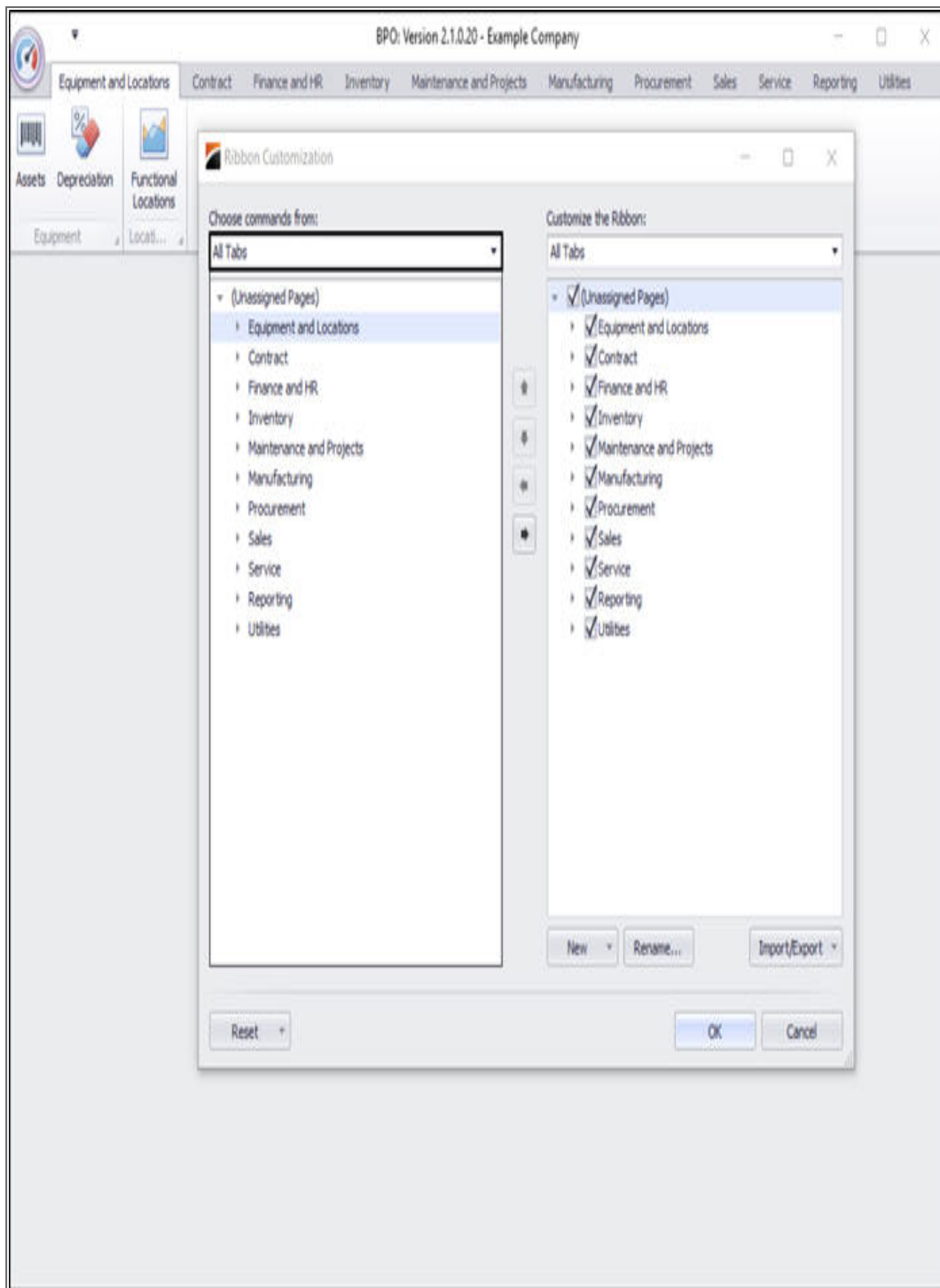
CHOOSE COMMANDS FROM...

- 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 BPO2.
 - This list is static and reflects the way your ribbon has automatically been configured on installation of BPO2.



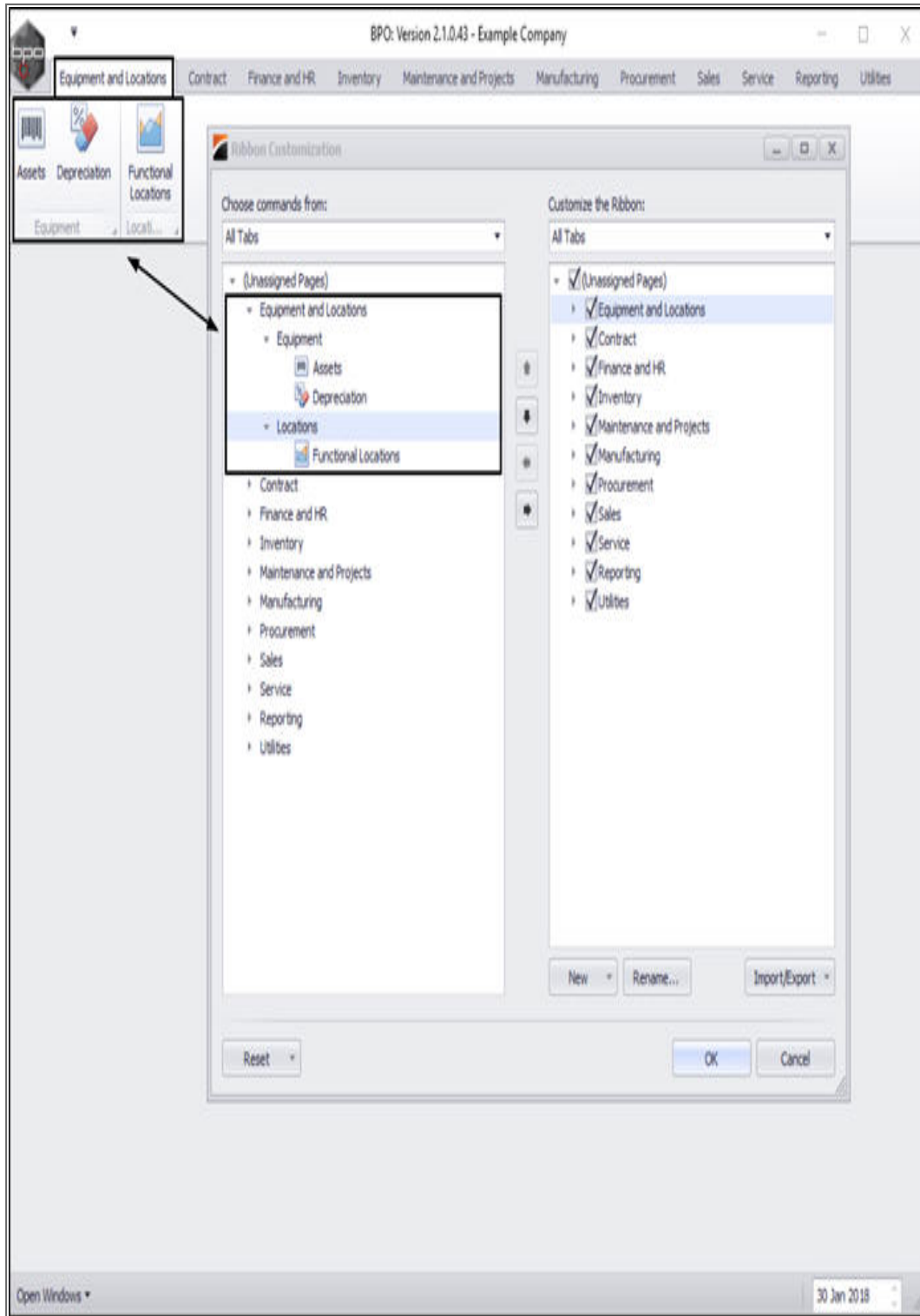
ALL TABS

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

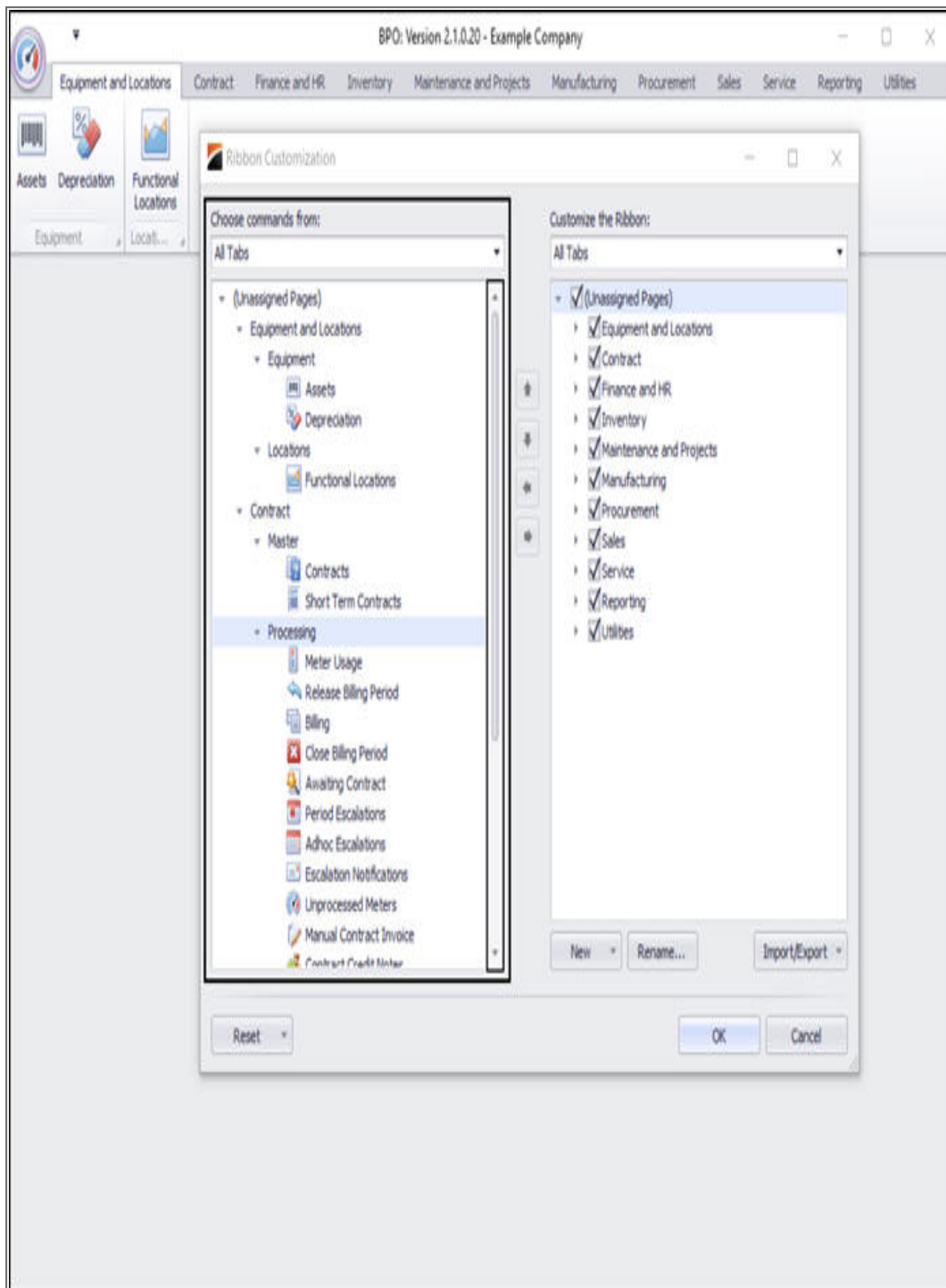


- This list can be expanded using the **drop-down arrows** next to the Tab titles to reveal the **Commands** contained in each tab.

- 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.



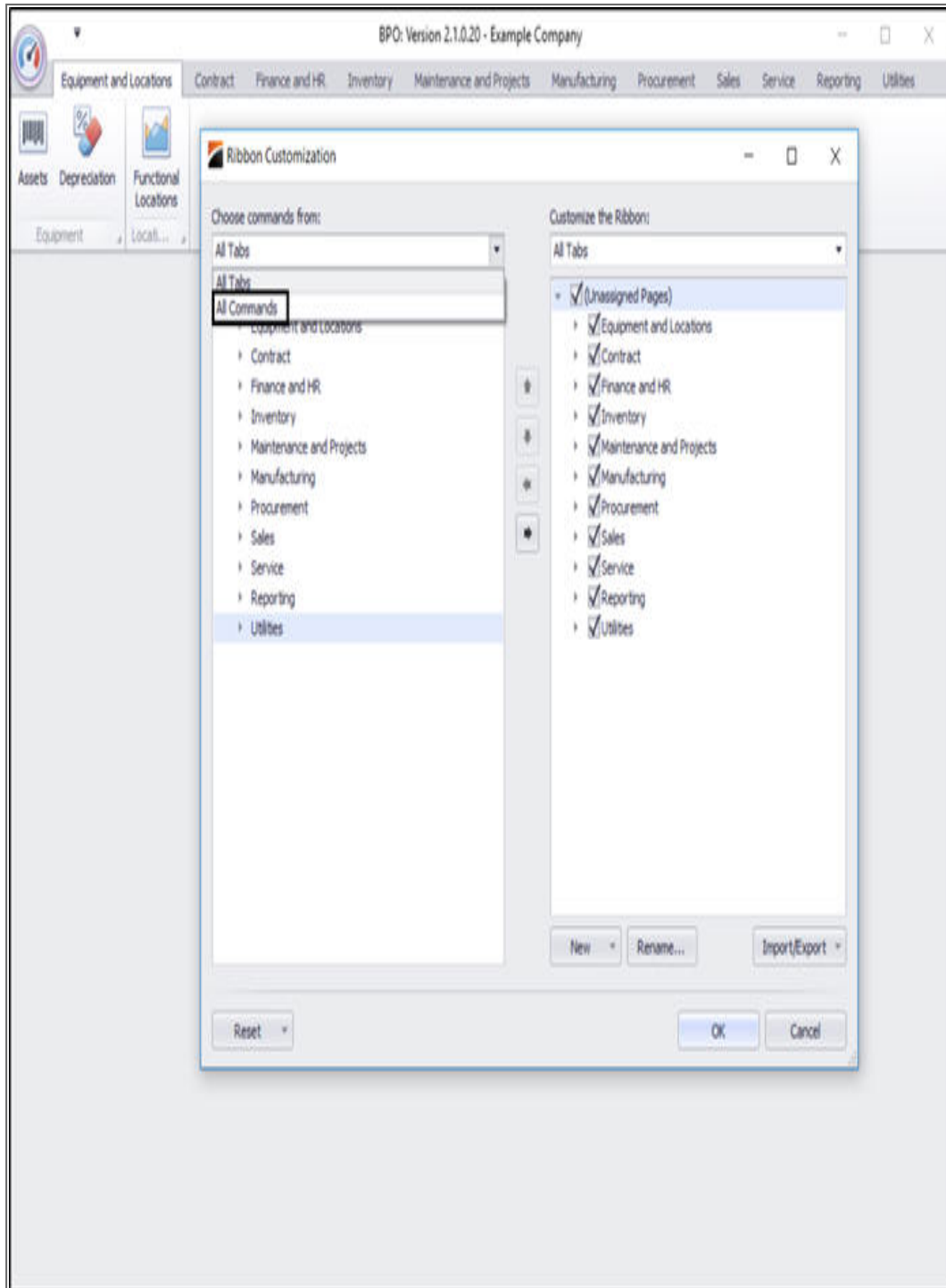
- The entire **All Tabs** list can be expanded to examine the contents.
- Use the scroll bar to peruse the tabs and commands that you may want to select for your customized ribbon.



- 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***.

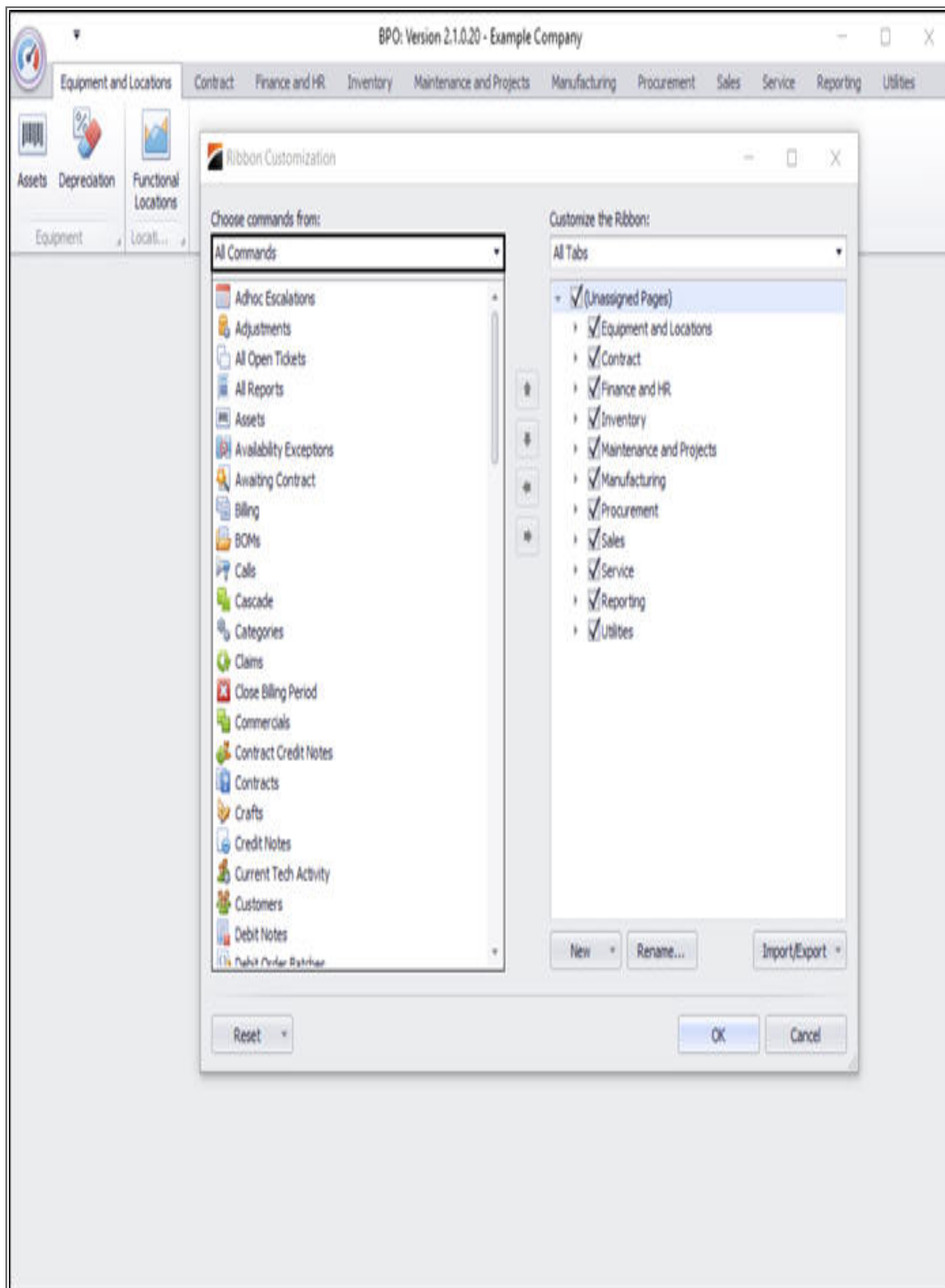
ALL COMMANDS

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



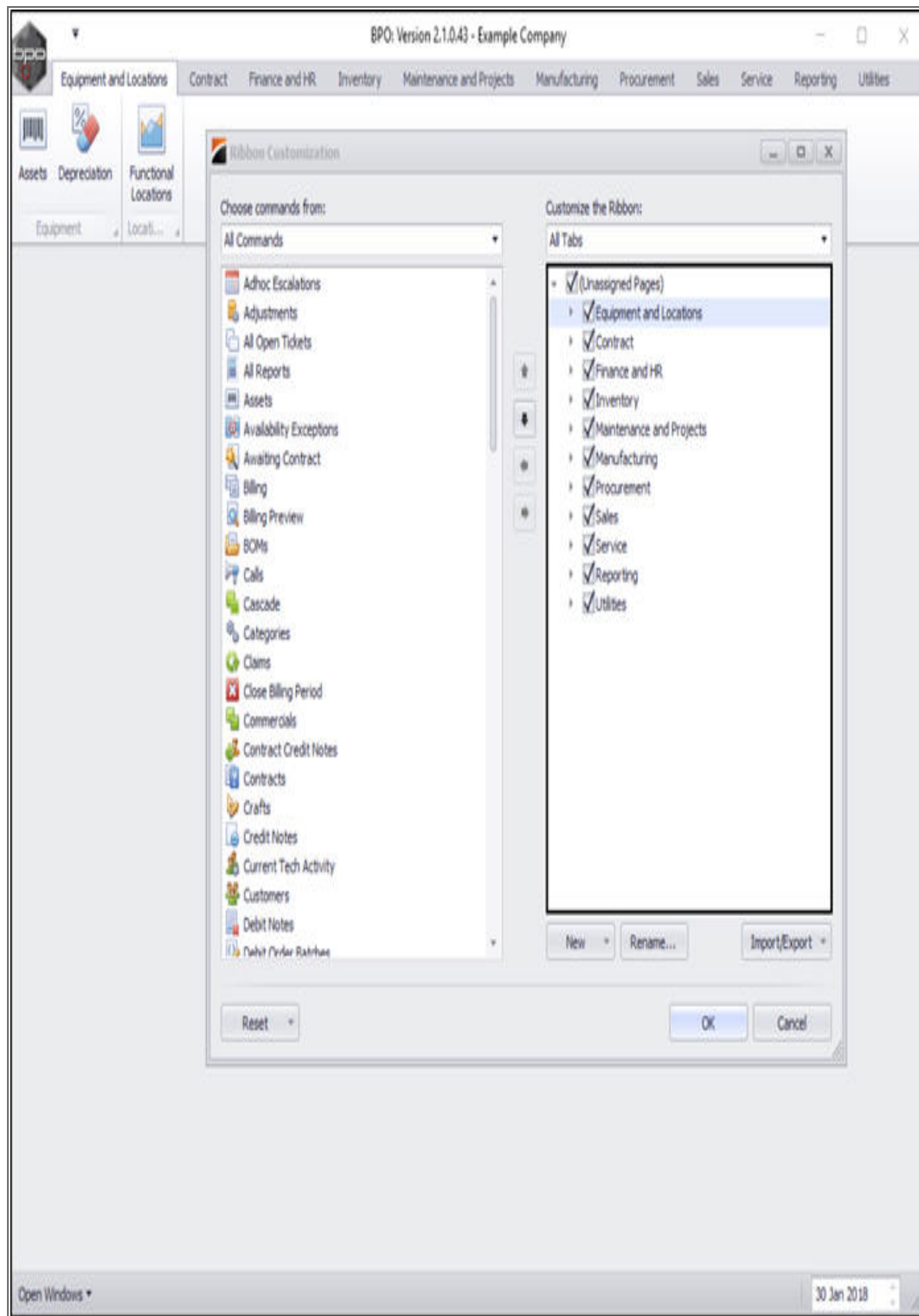
- Now an alphabetical list of all the **Commands** in BPO will be displayed.

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



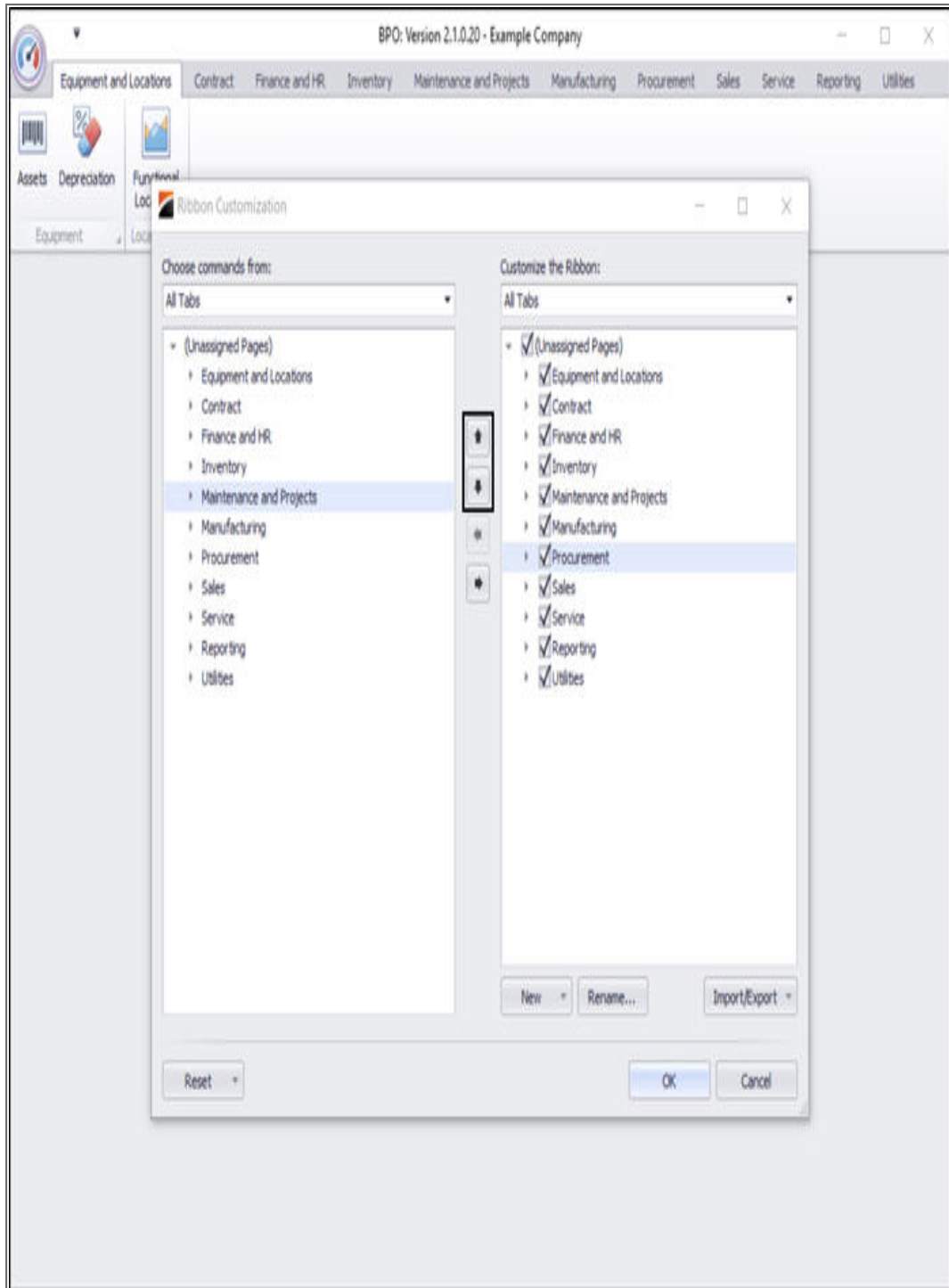
CUSTOMISE THE RIBBON...

- 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.



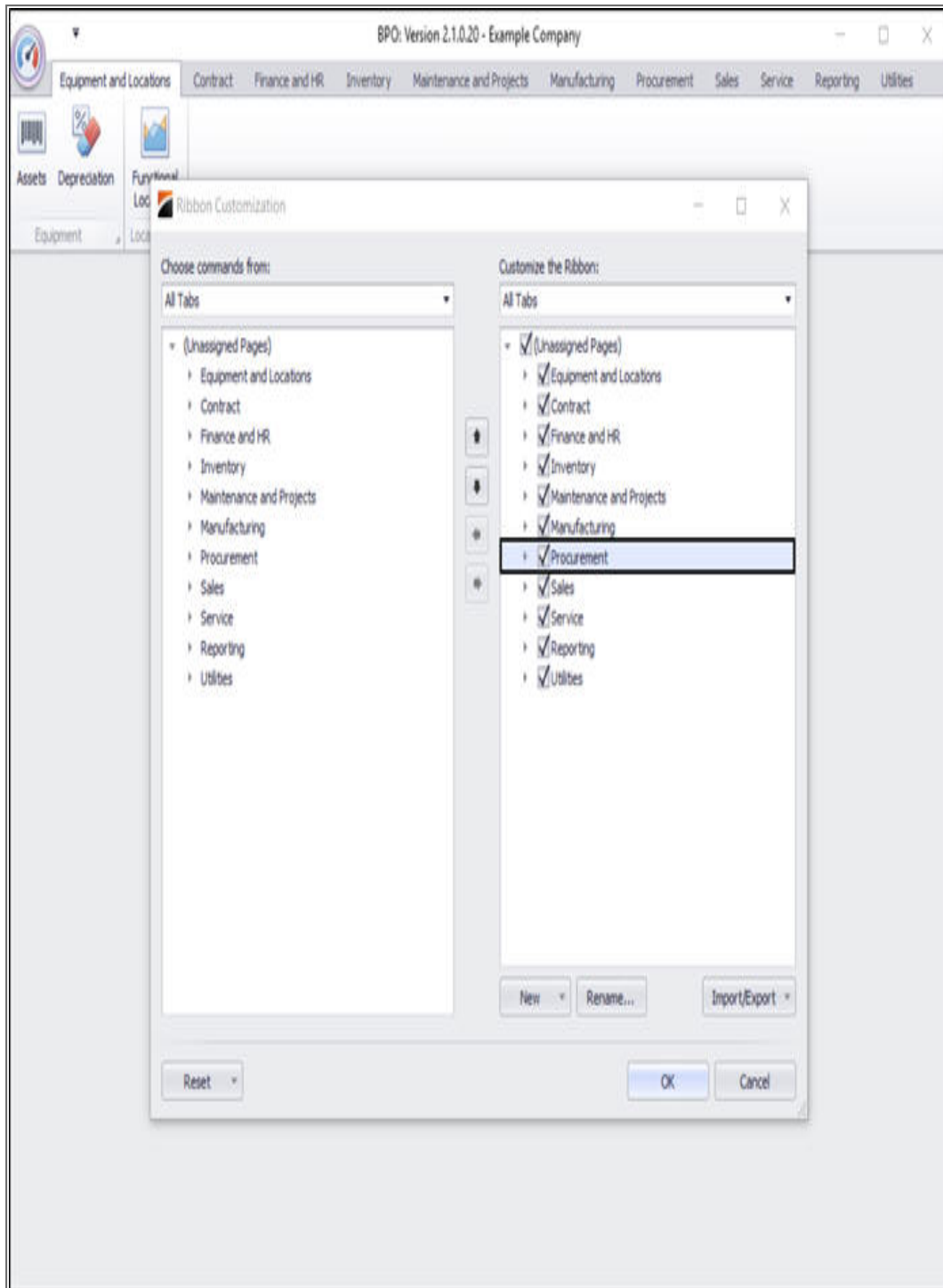
CHANGE TAB ORDER

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

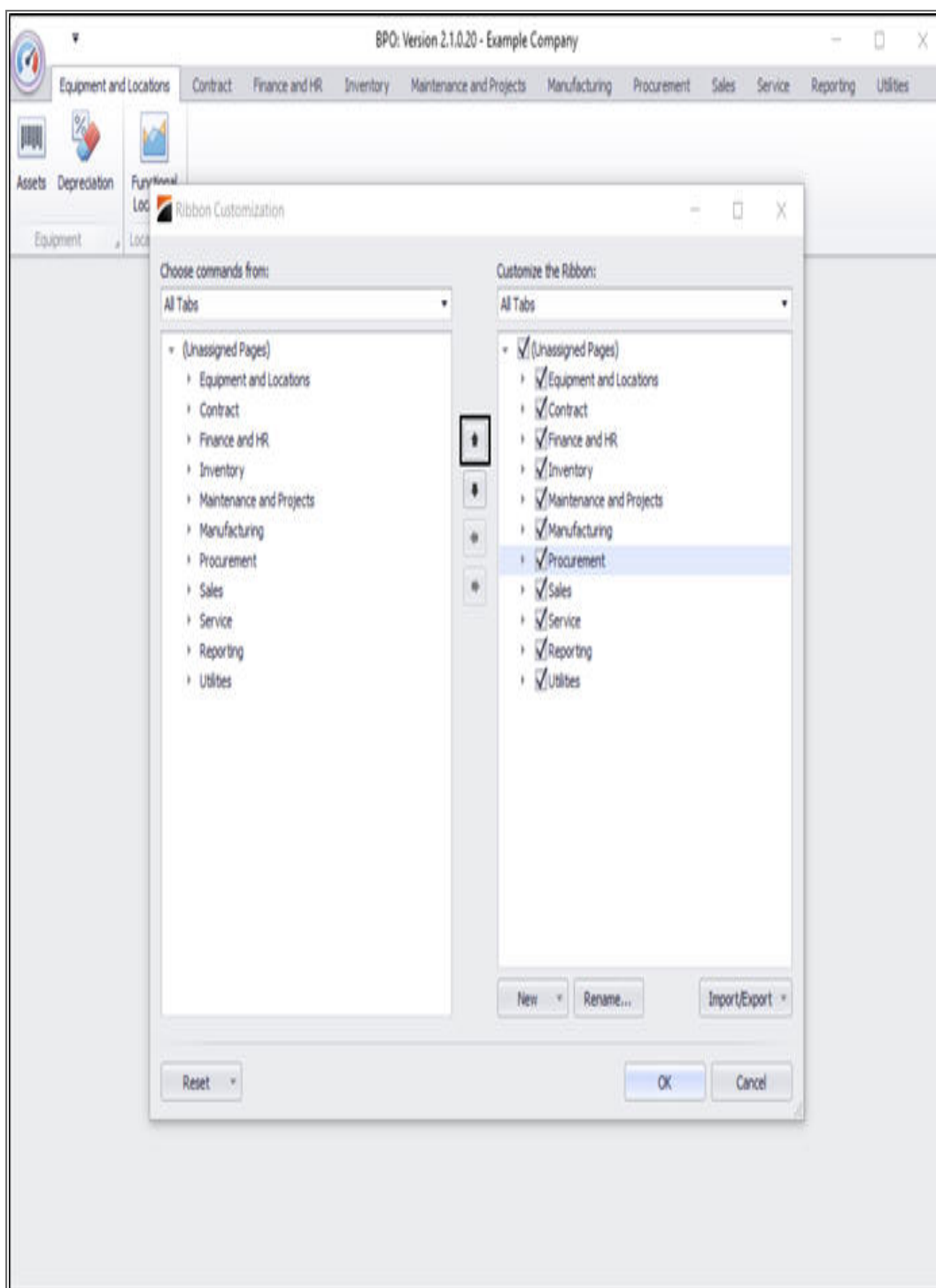


For example:

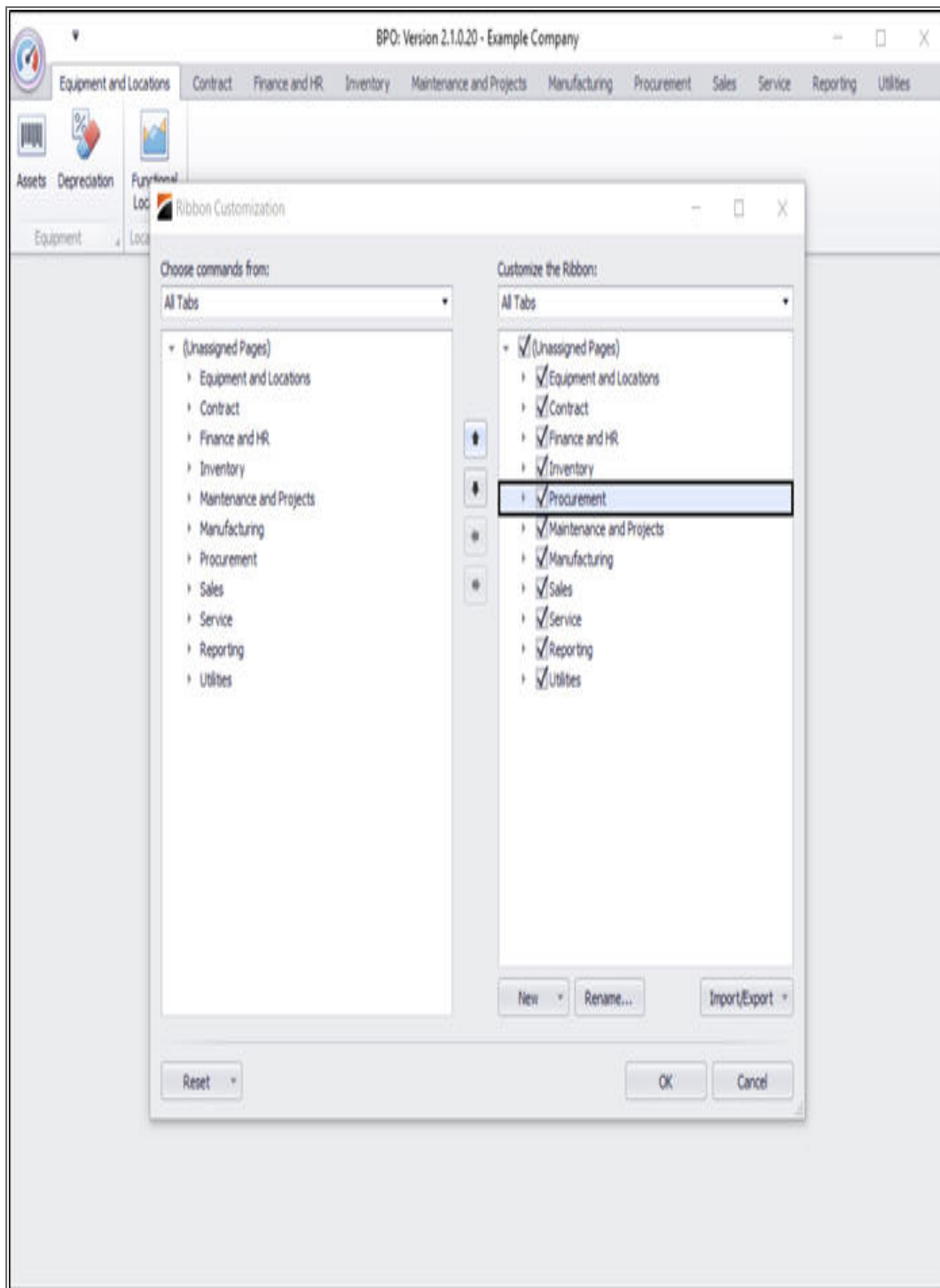
- In this image **Procurement** has been selected.
- It is currently **7th** position in the list.



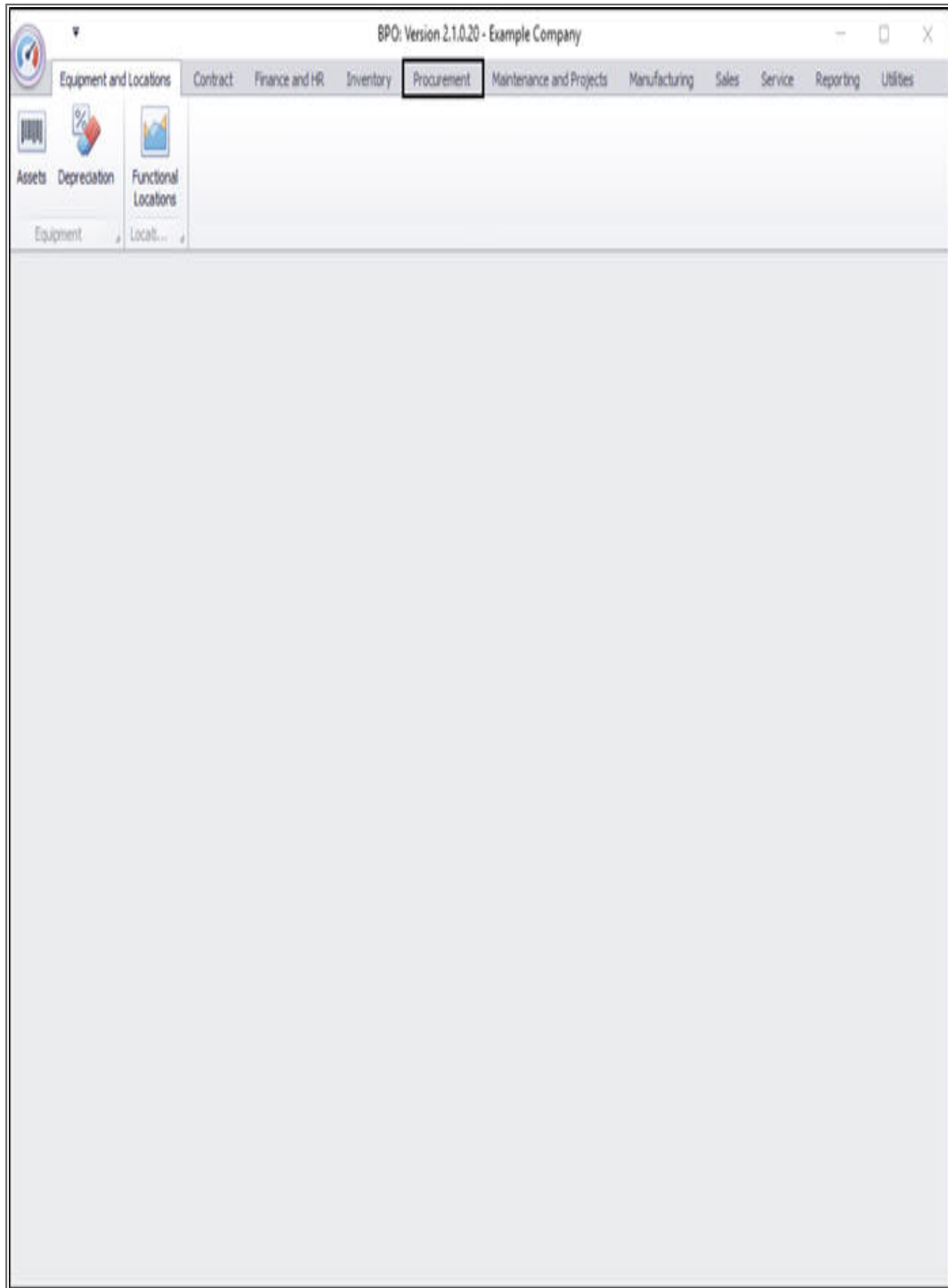
- Click twice on the **up arrow**.



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

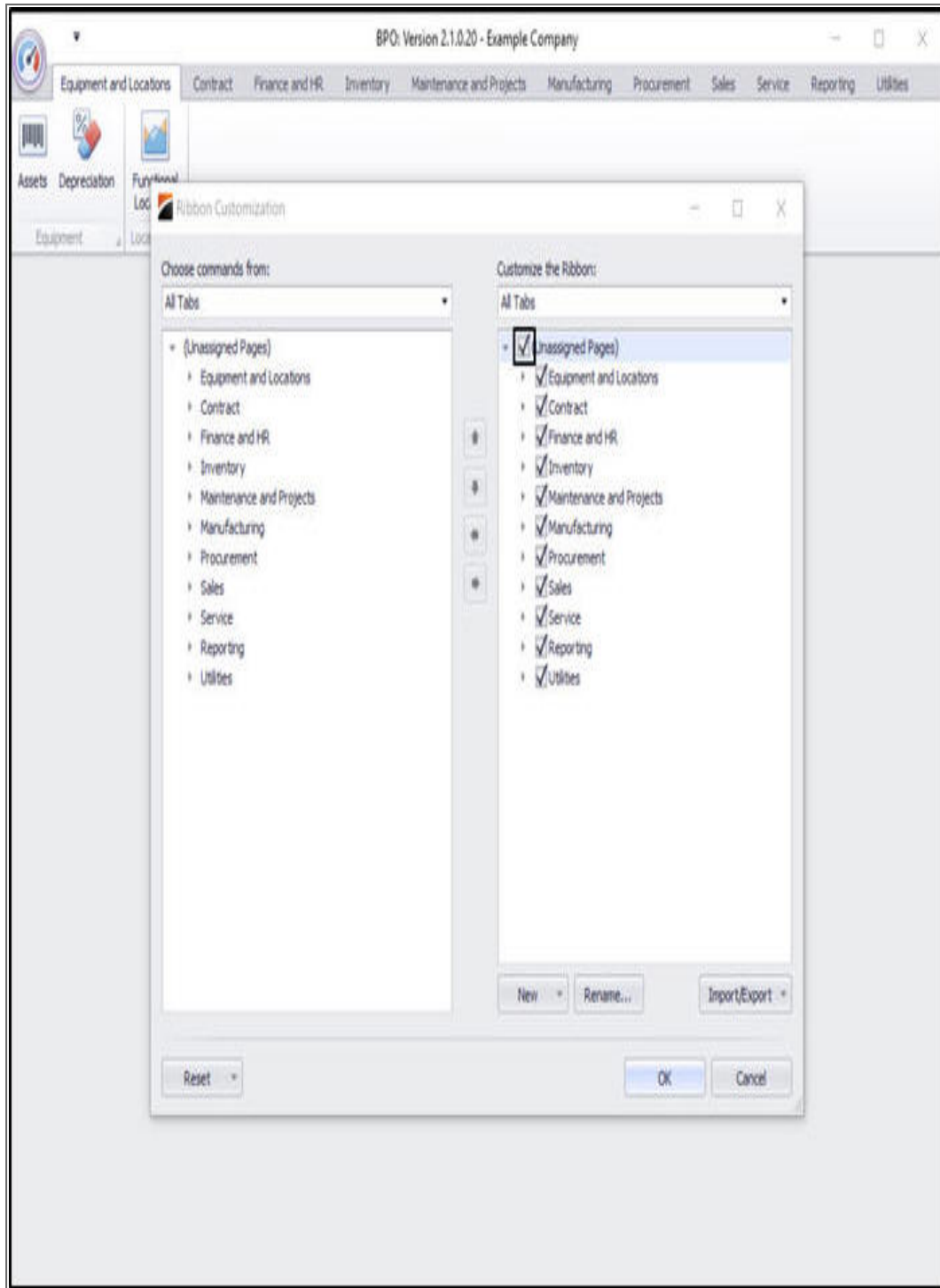


- Additionally, in your ribbon, **Procurement** will now display **5th** instead of **7th**.



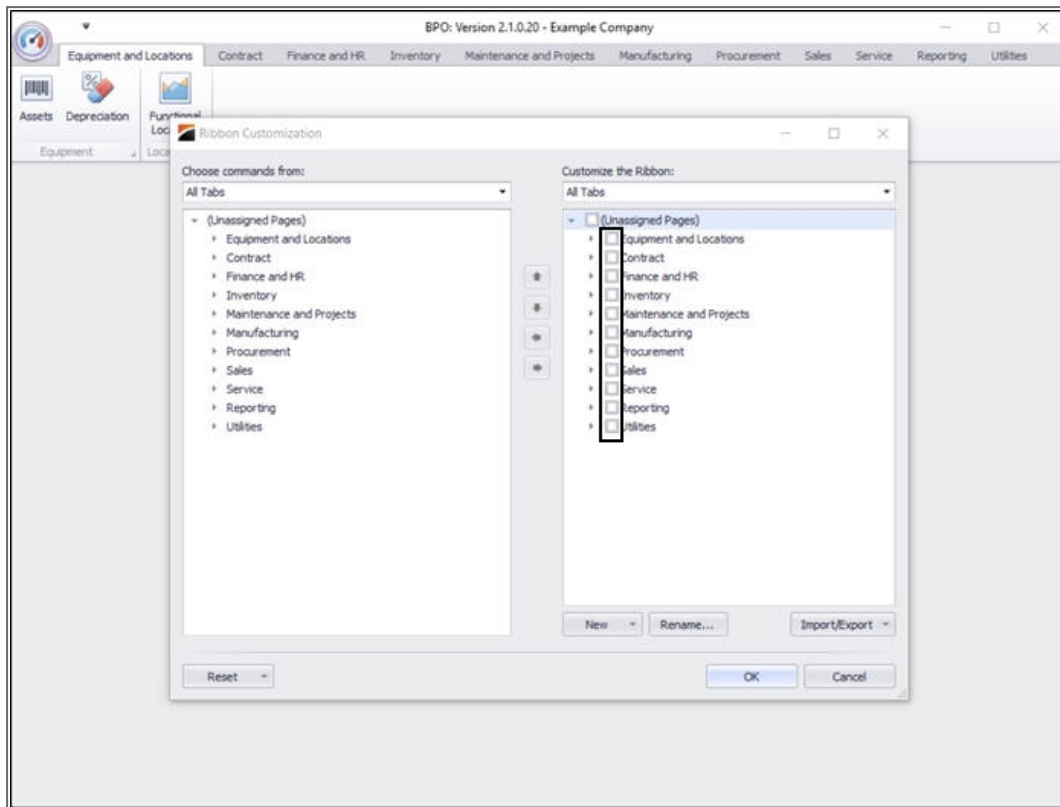
CLEAR ALL CUSTOMIZATIONS

- 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**.



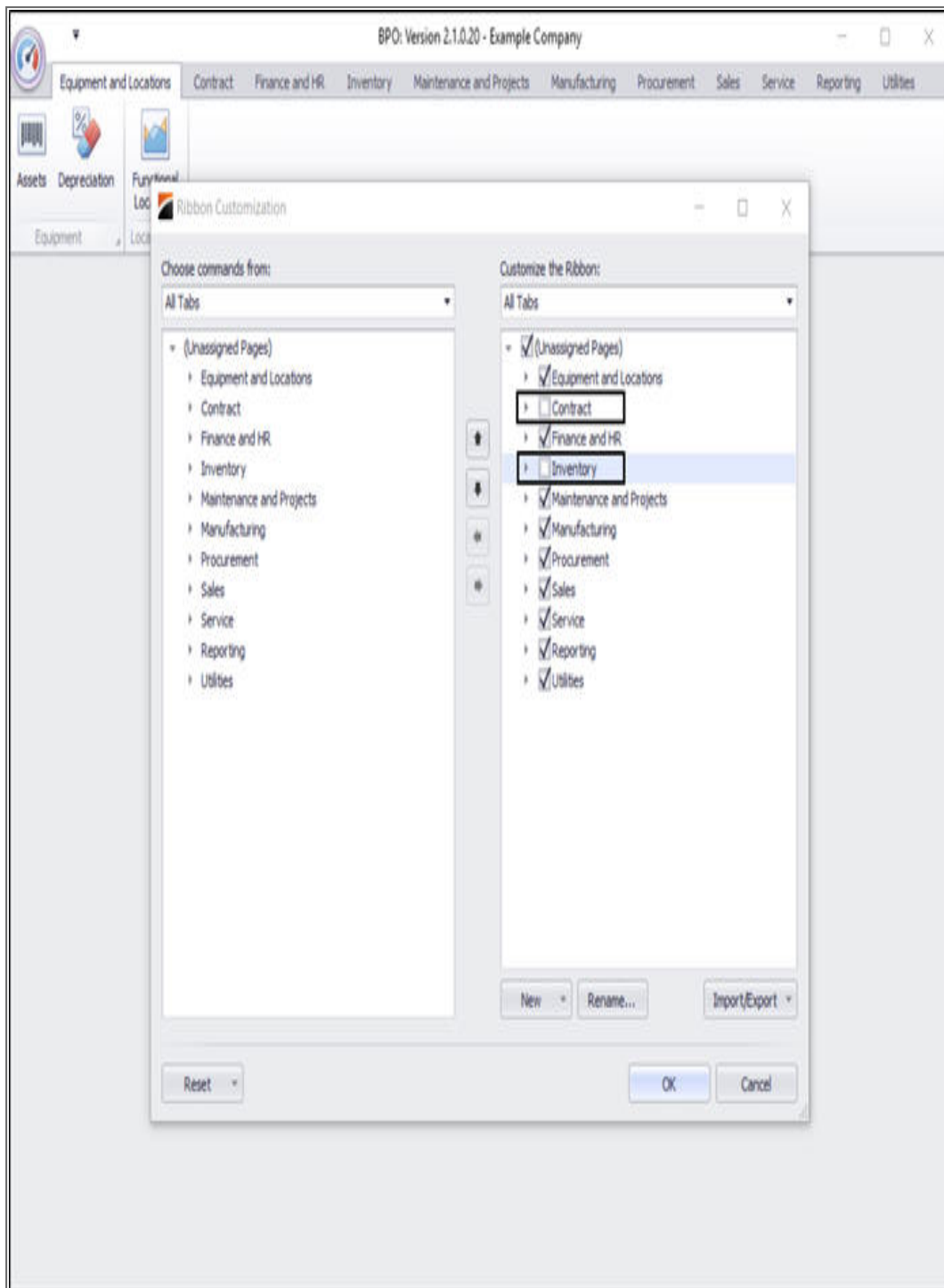
- This will clear all customizations for you to be able to start with a clear slate.

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



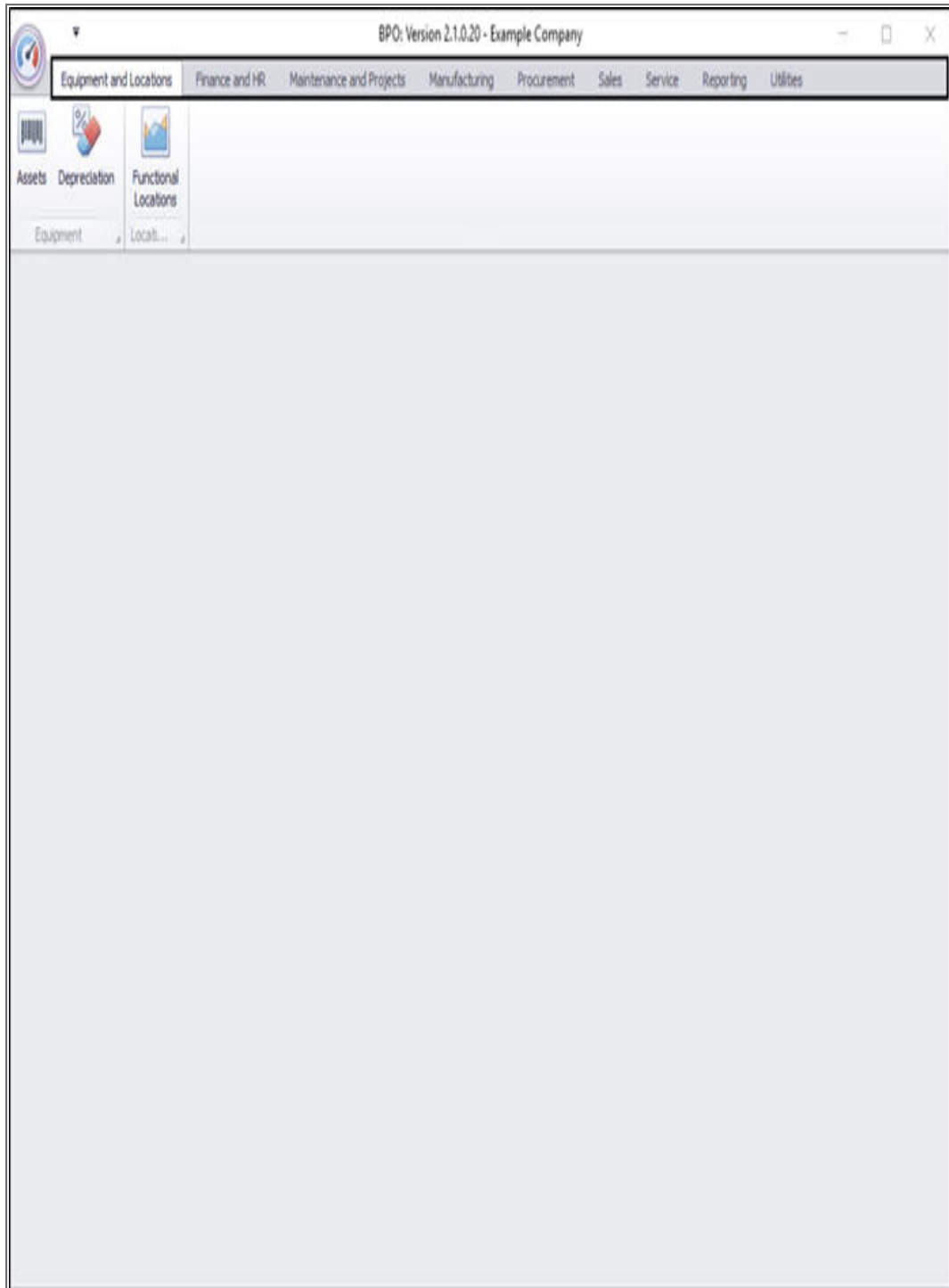
SELECT SPECIFIC CUSTOMIZATIONS

- 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.



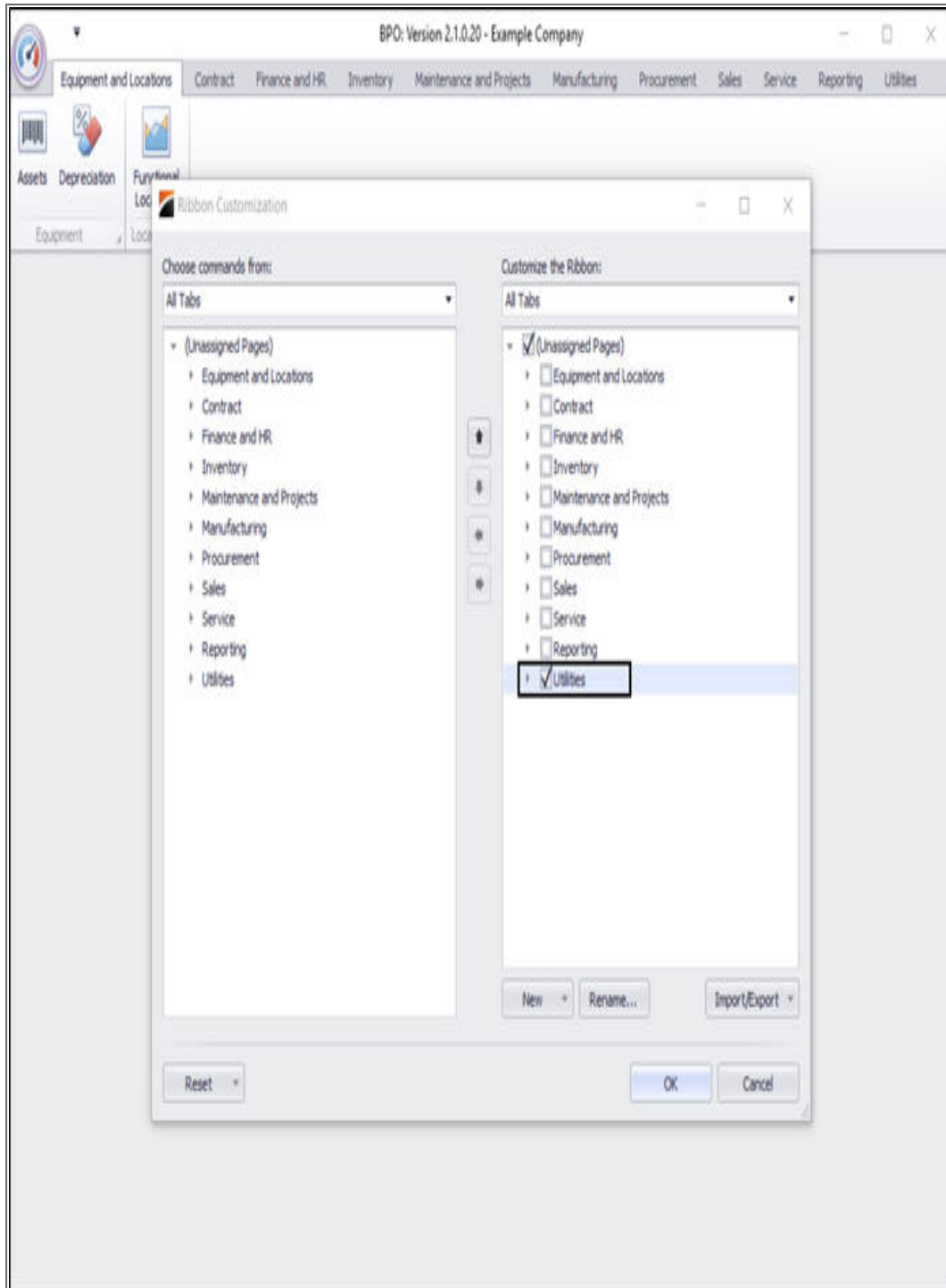
- Your **Ribbon** will now display the customizations that you have made.

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

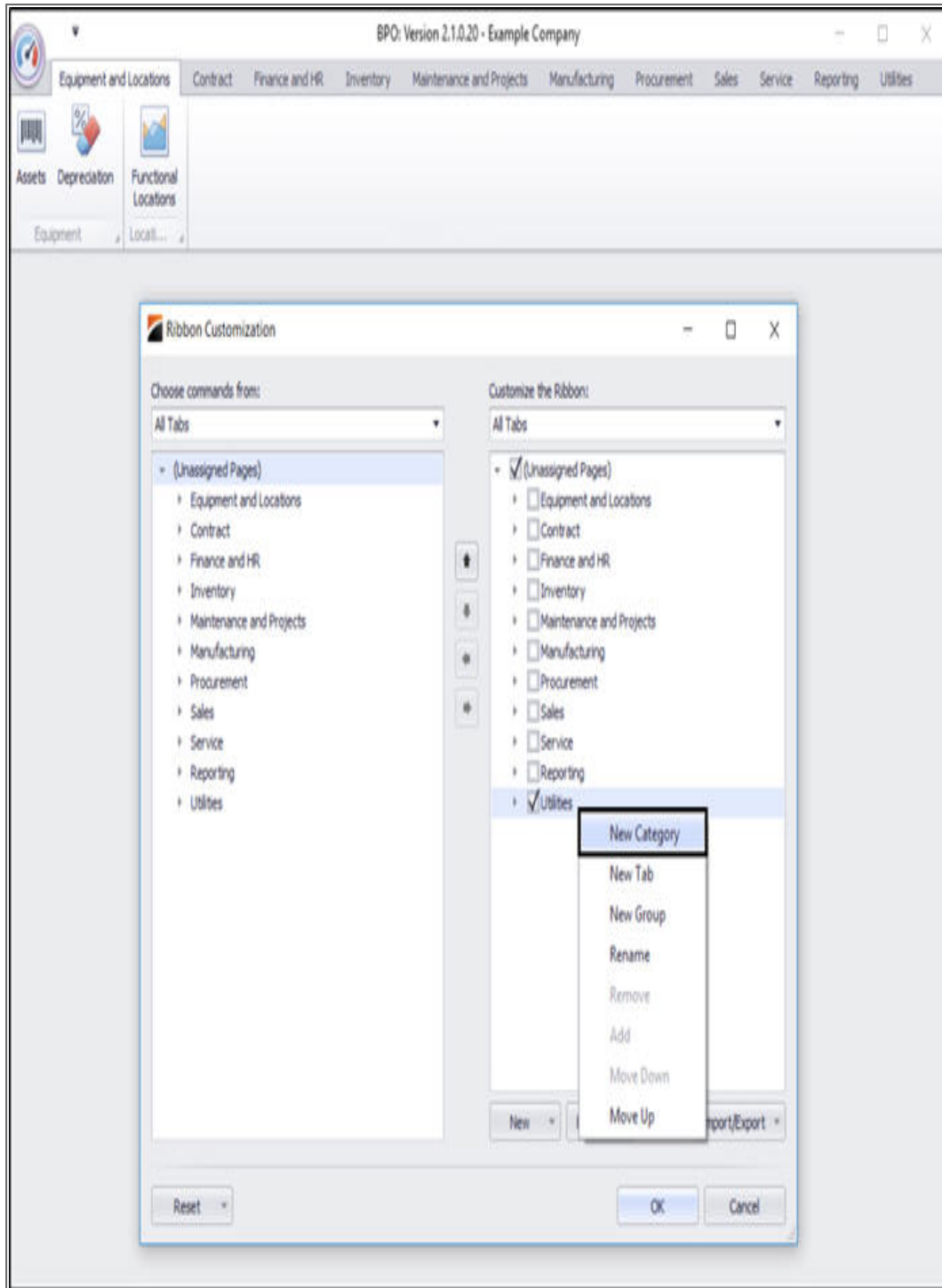


ADD NEW CATEGORIES, TABS AND GROUPS

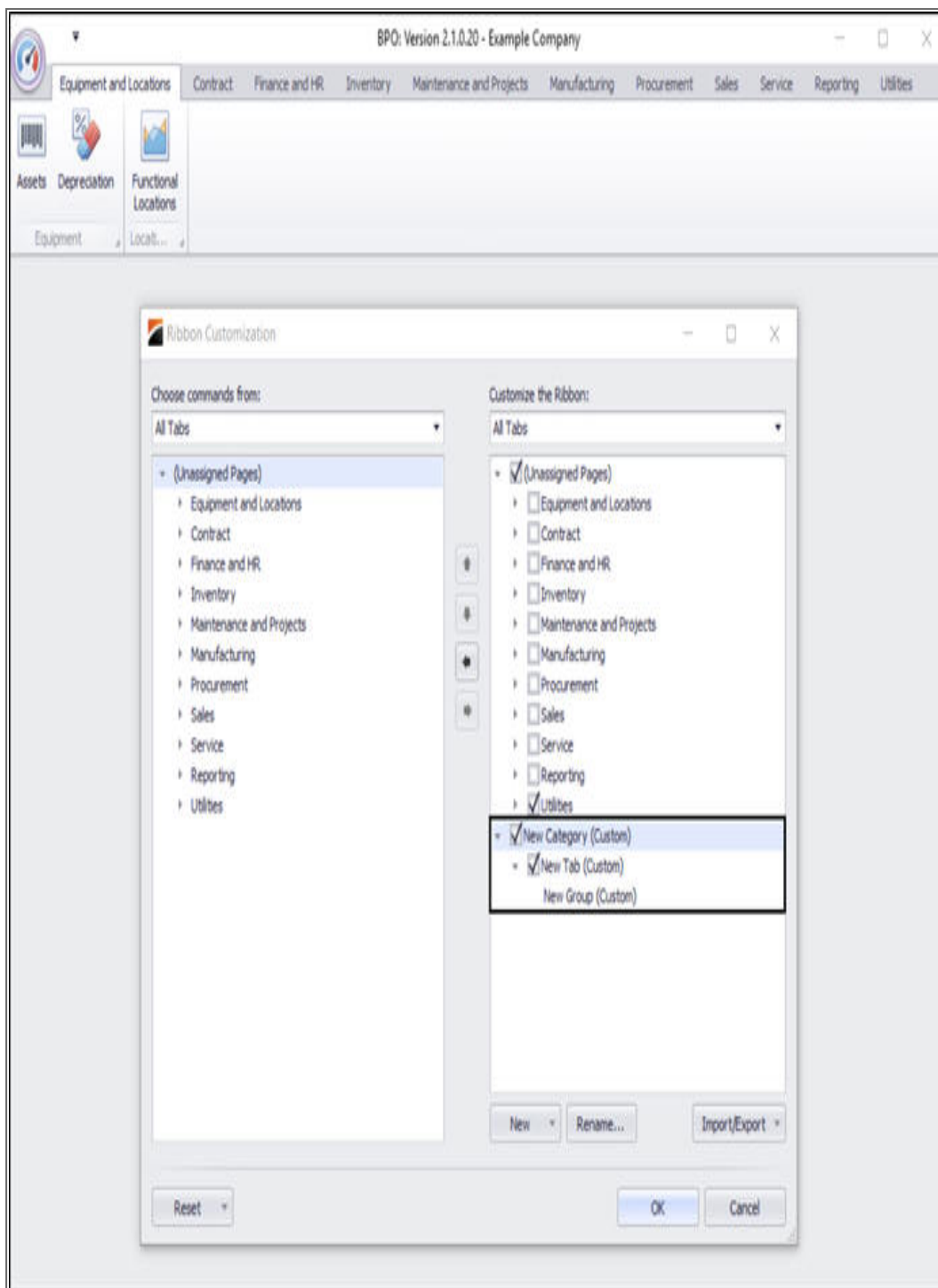
- You can add *New Categories*, *New Tabs* and *New Groups* to your Ribbon.
- Select any of the tabs in the list.
 - In this image the *Utilities* tab has been selected.



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

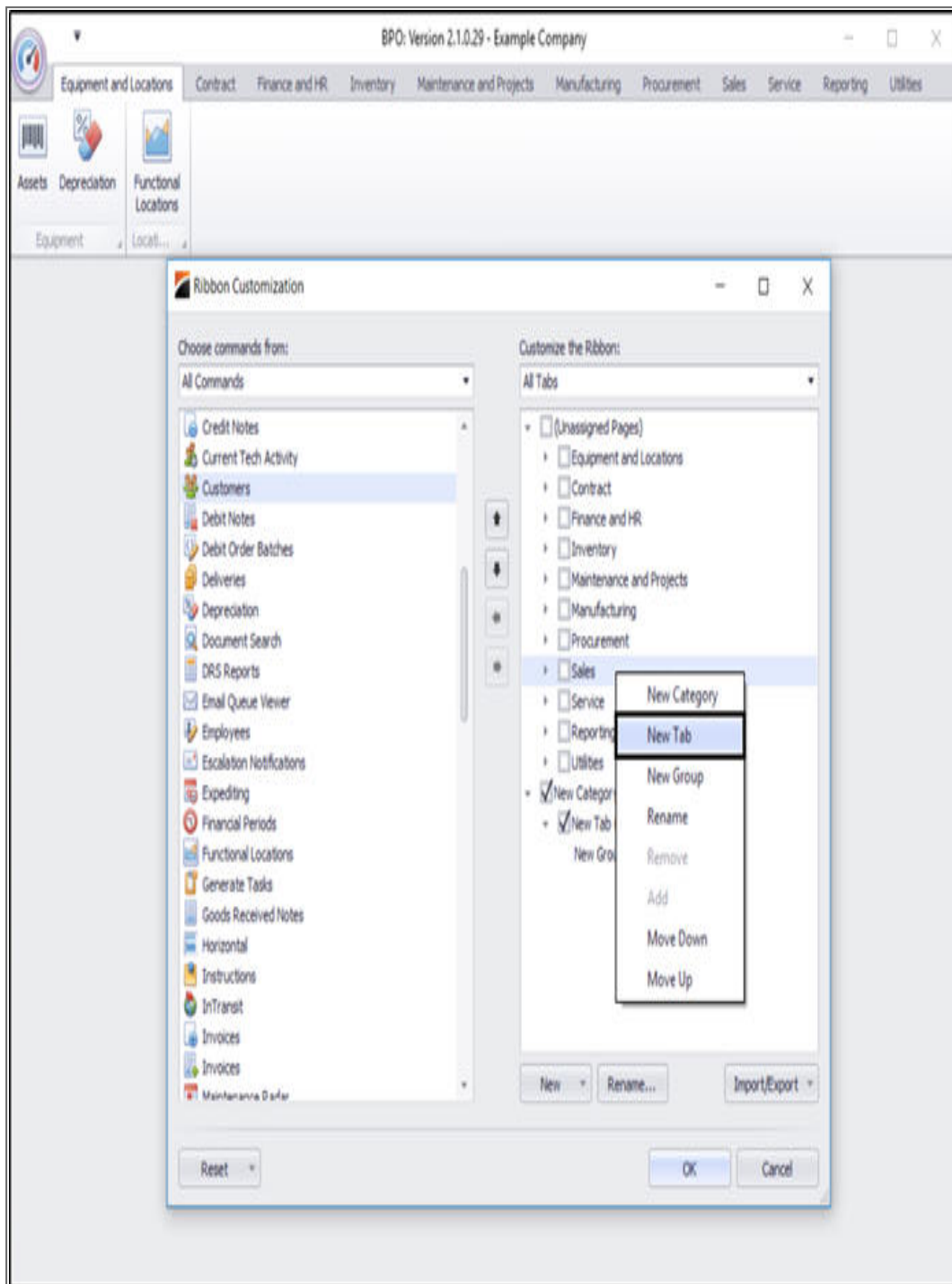


- A ***New Category*** has been added to the list.
- The system automatically adds a ***New Tab*** and a ***New Group*** within a new category.
- The ***New Category***, ***New Tab*** and ***New Group*** have (***Custom***) after their titles to let you know that they are your customized additions to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

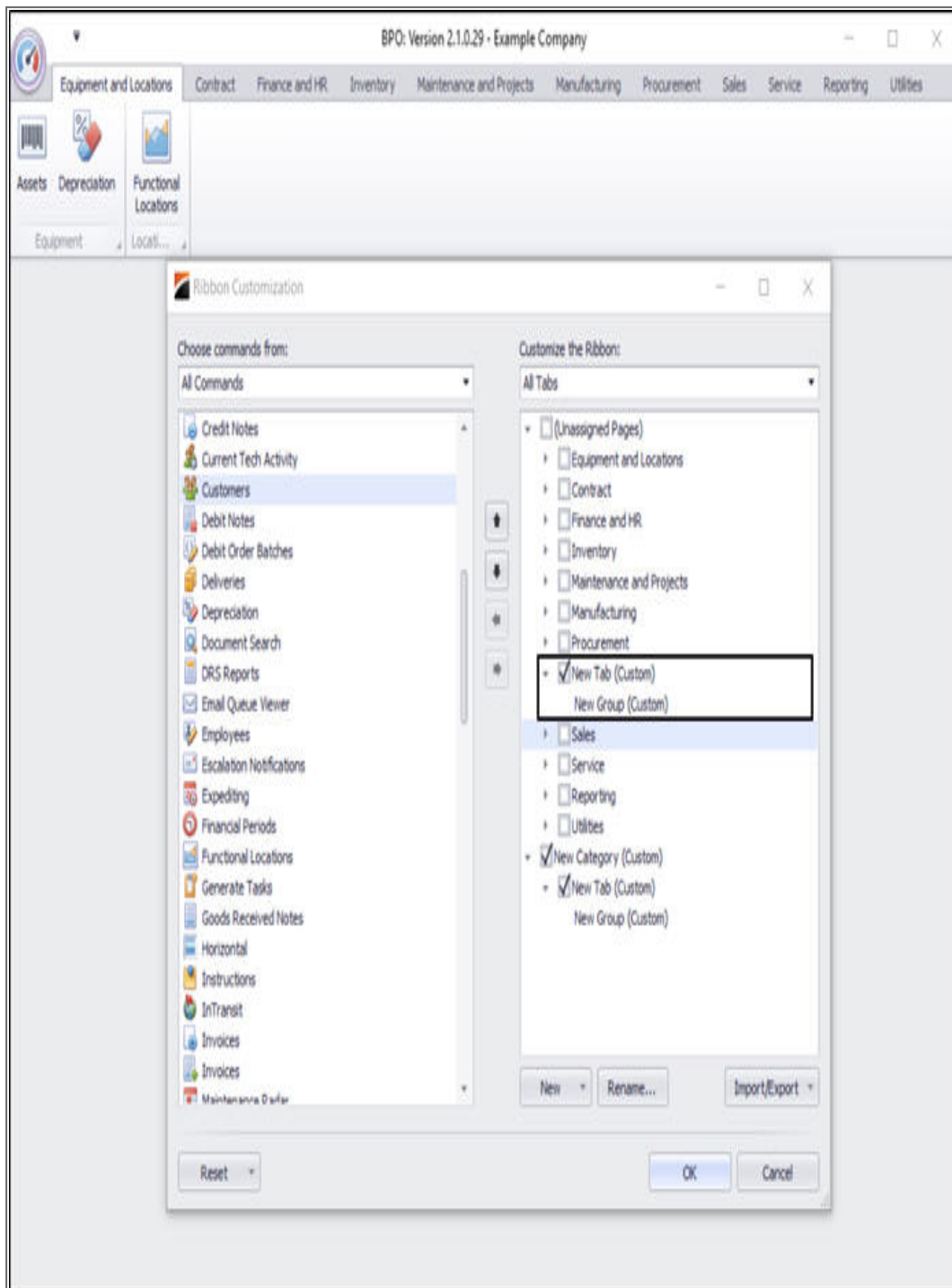


- You can also add a **New Tab** without creating a **New Category**.
- **Right click** on any Tab in the list. In this image the **Sales** Tab has been selected.

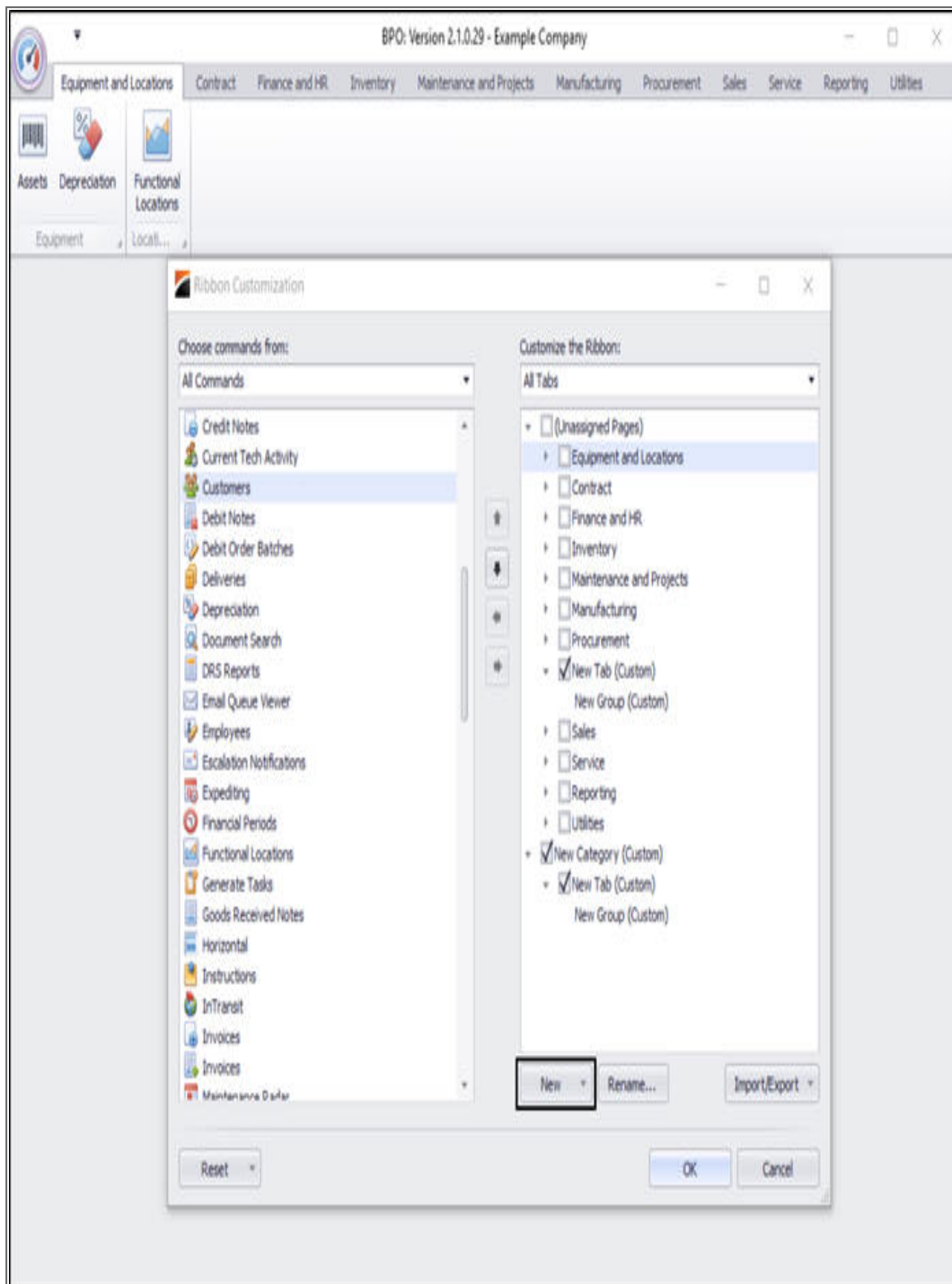
- The pop-up menu will be displayed.
- Click on **New Tab**.



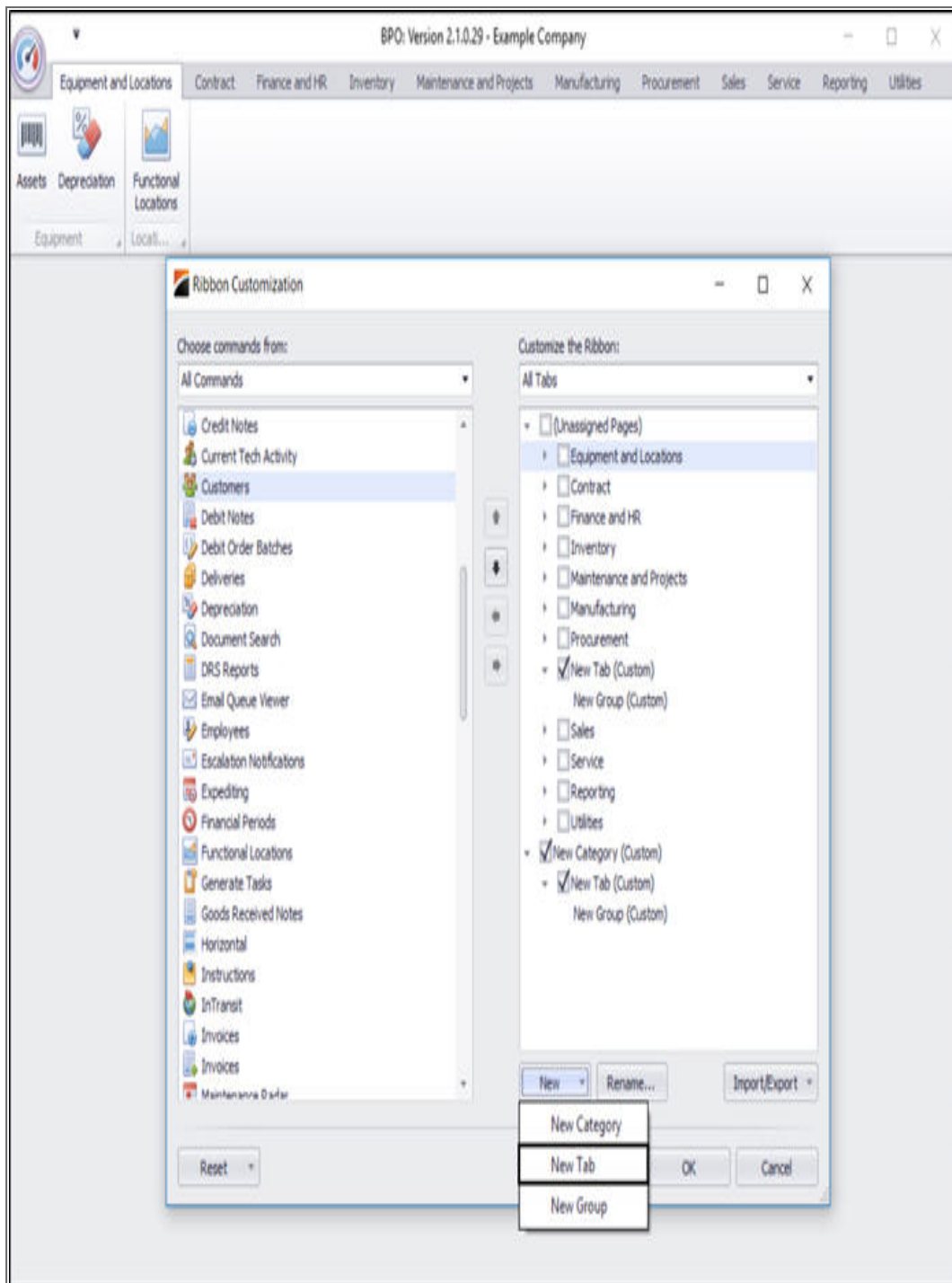
- A **New Tab** (and automatically a **New Group**) has been added to the Customized list.
- The **New Tab** has been positioned above the Tab you selected but this position can be altered as explained by using the **arrows** in the centre of the screen or by selecting the **Move Up** or **Move Down**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

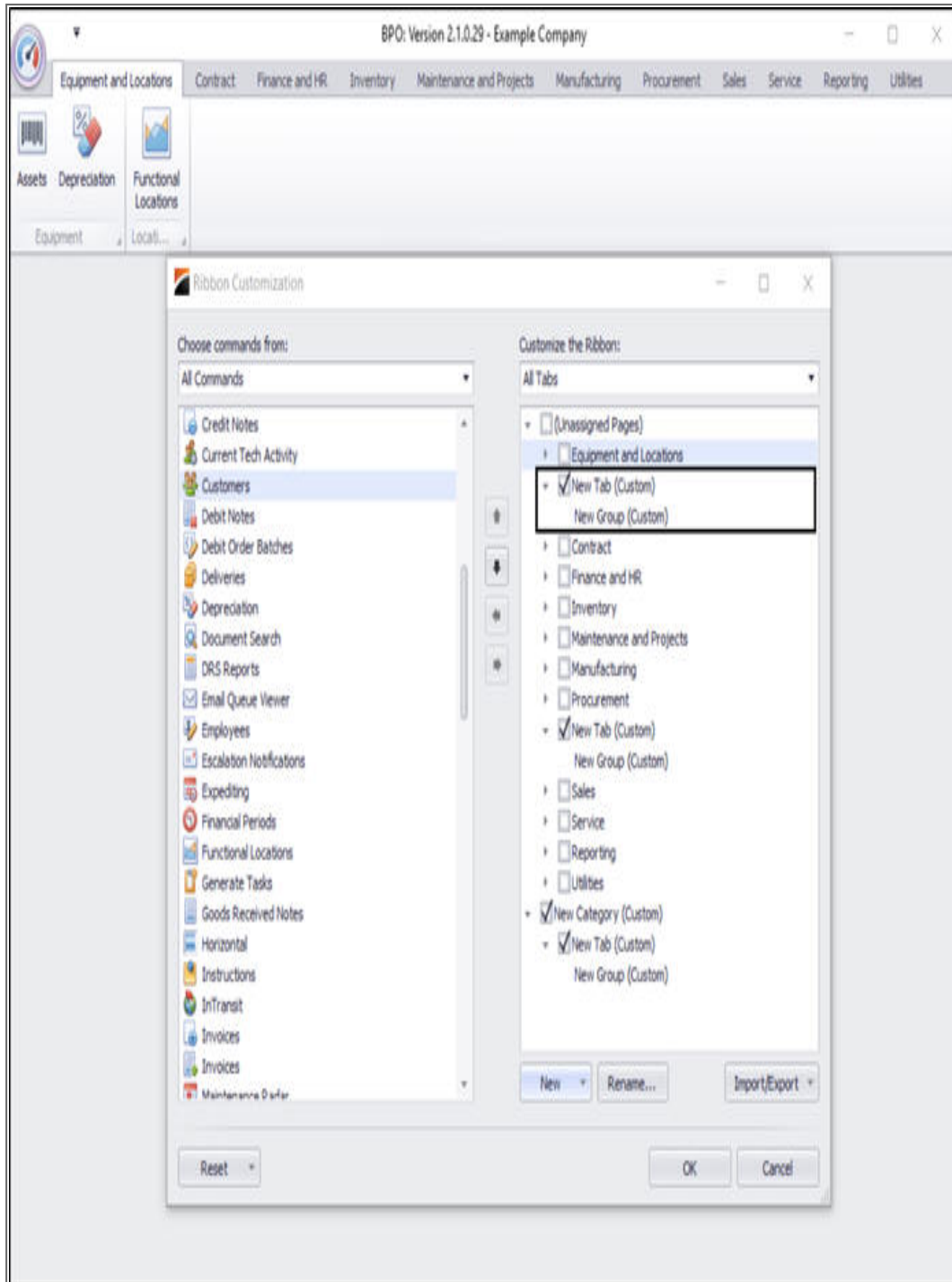


- Click on **New** and select from the drop-down menu.
 - In this image, **New Tab** has been selected.



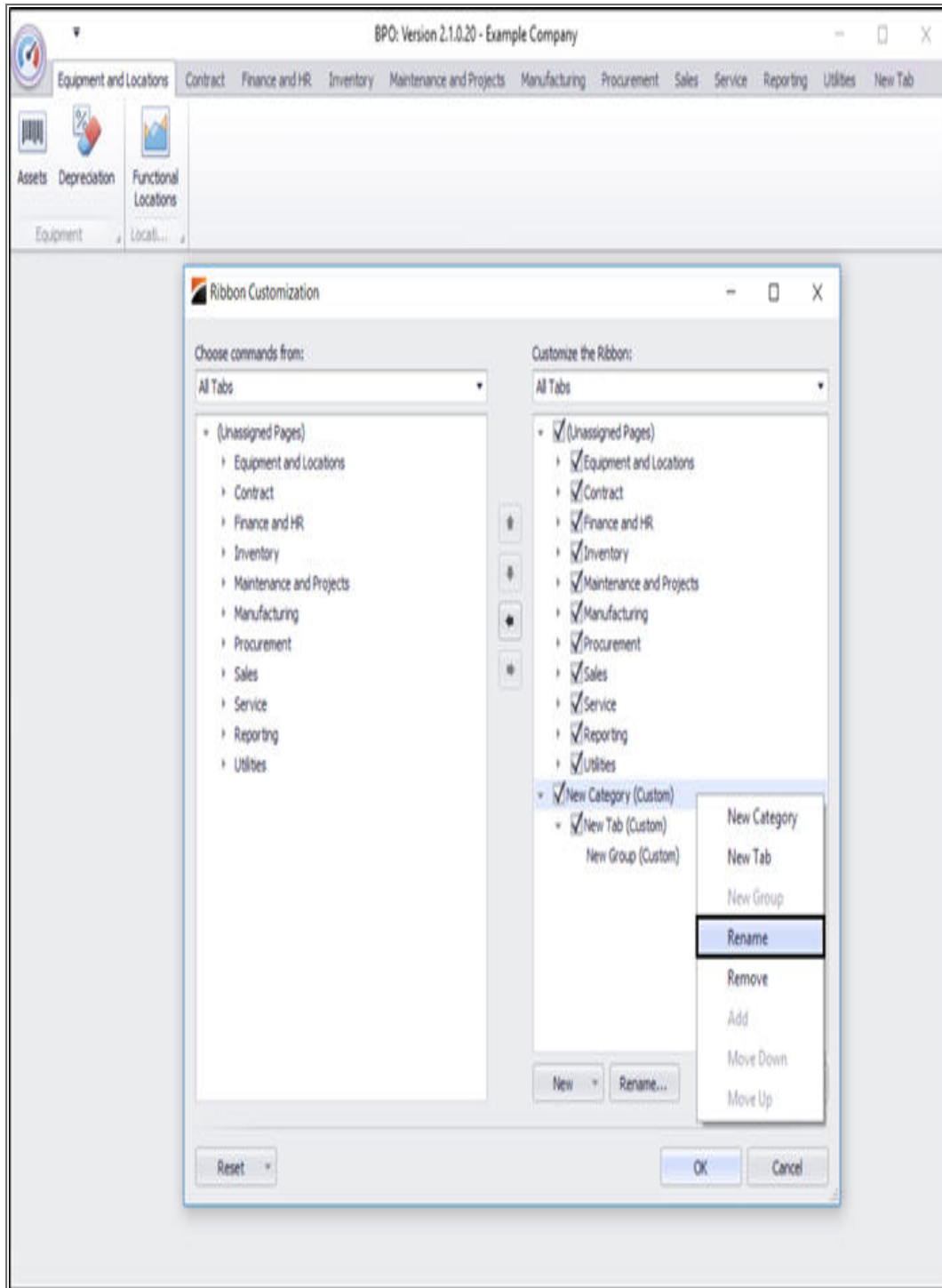
- A **New Tab** (and automatically a **New Group**) has been added to the Customized list.

- 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.

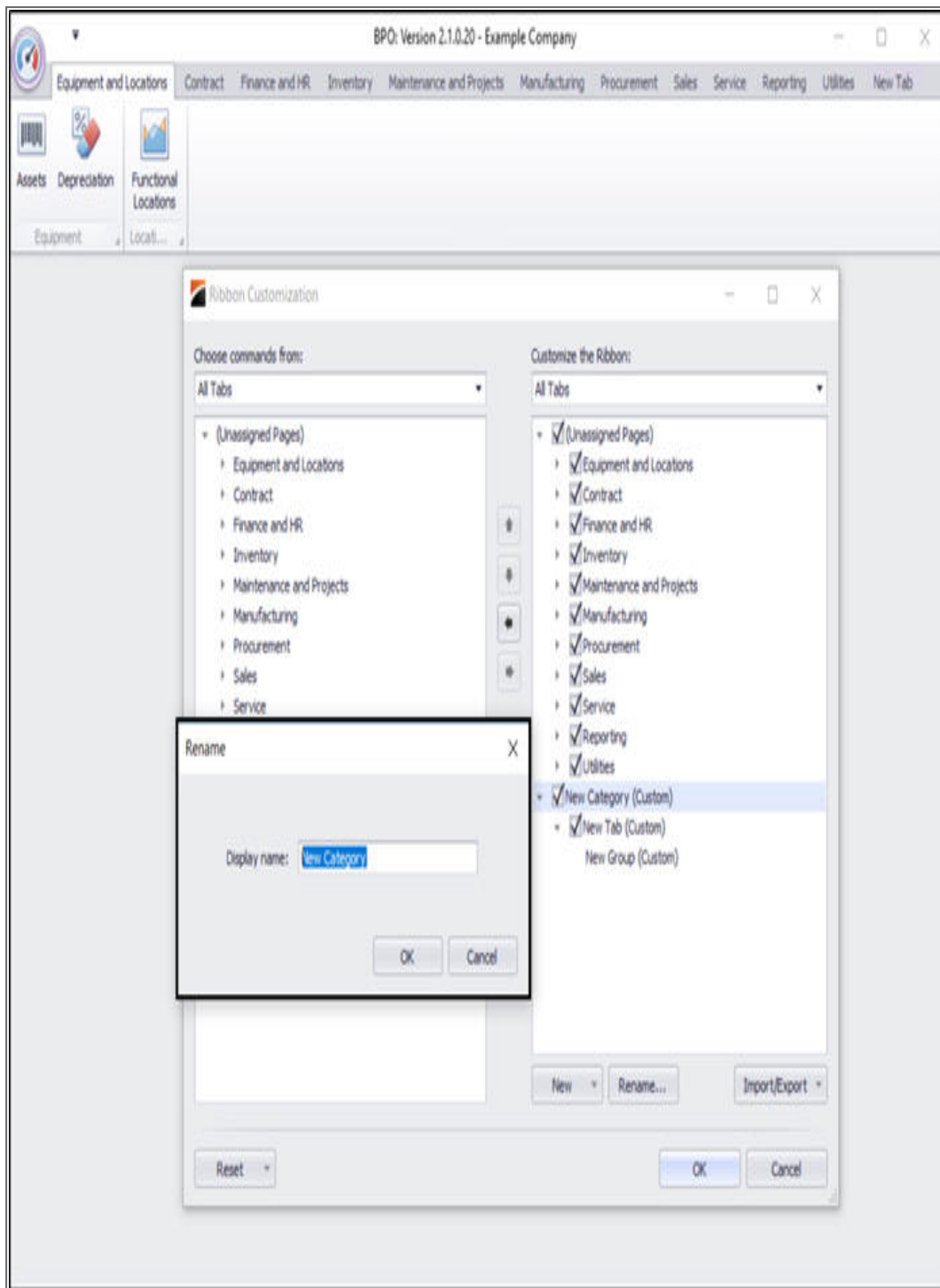


RENAME CATEGORIES, TABS AND GROUPS

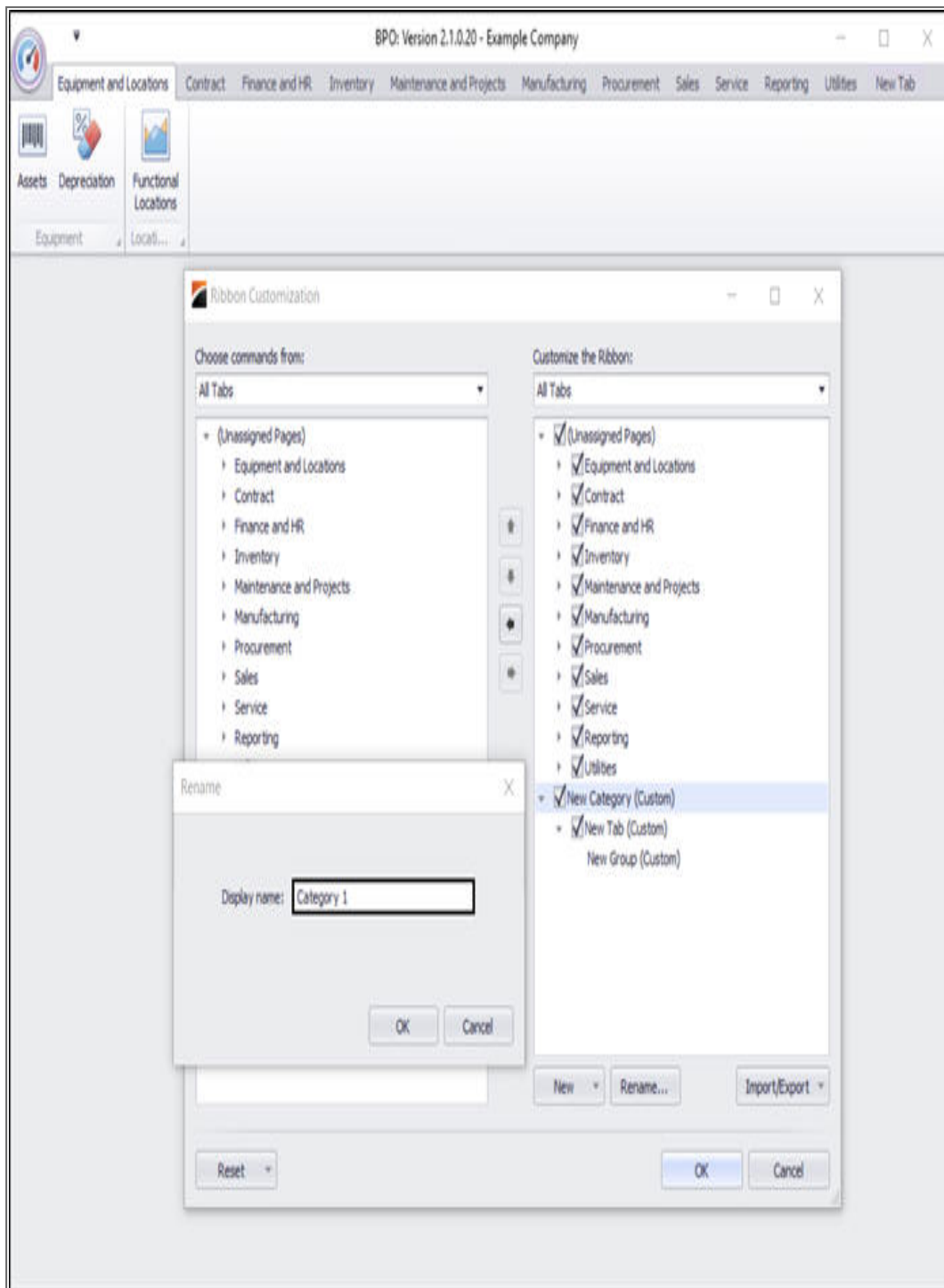
- You can rename each of these new customizations by selecting and right clicking on one of them.
- In this image, the ***New Category*** has been selected (highlighted).
- This will display the pop-up menu again.
- Click on ***Rename***.



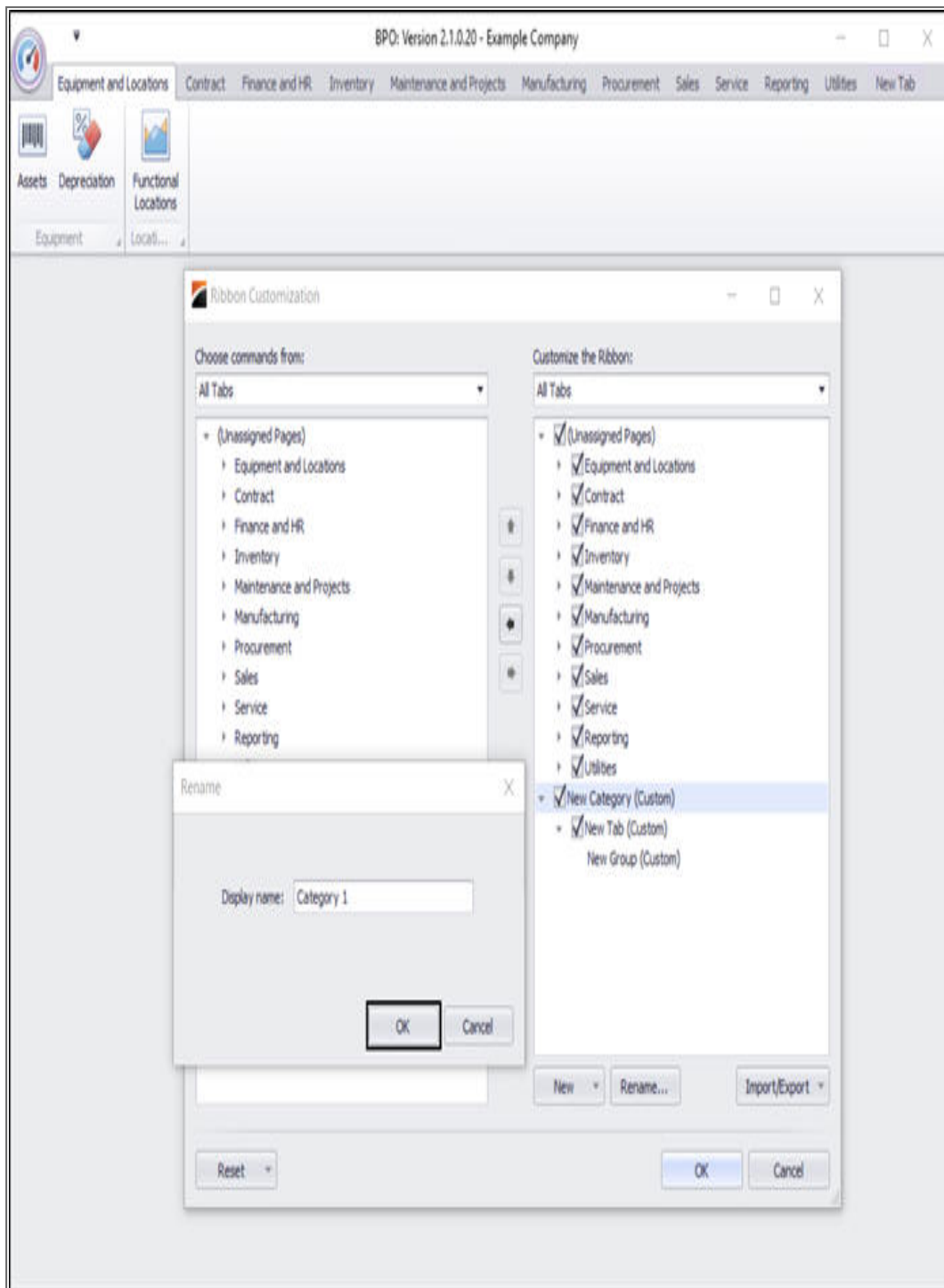
- A **Rename** pop-up screen will appear.
- The **Display name:** cell auto populates with the original name of New Category.
- Type your name of choice over **New Category** in this cell.



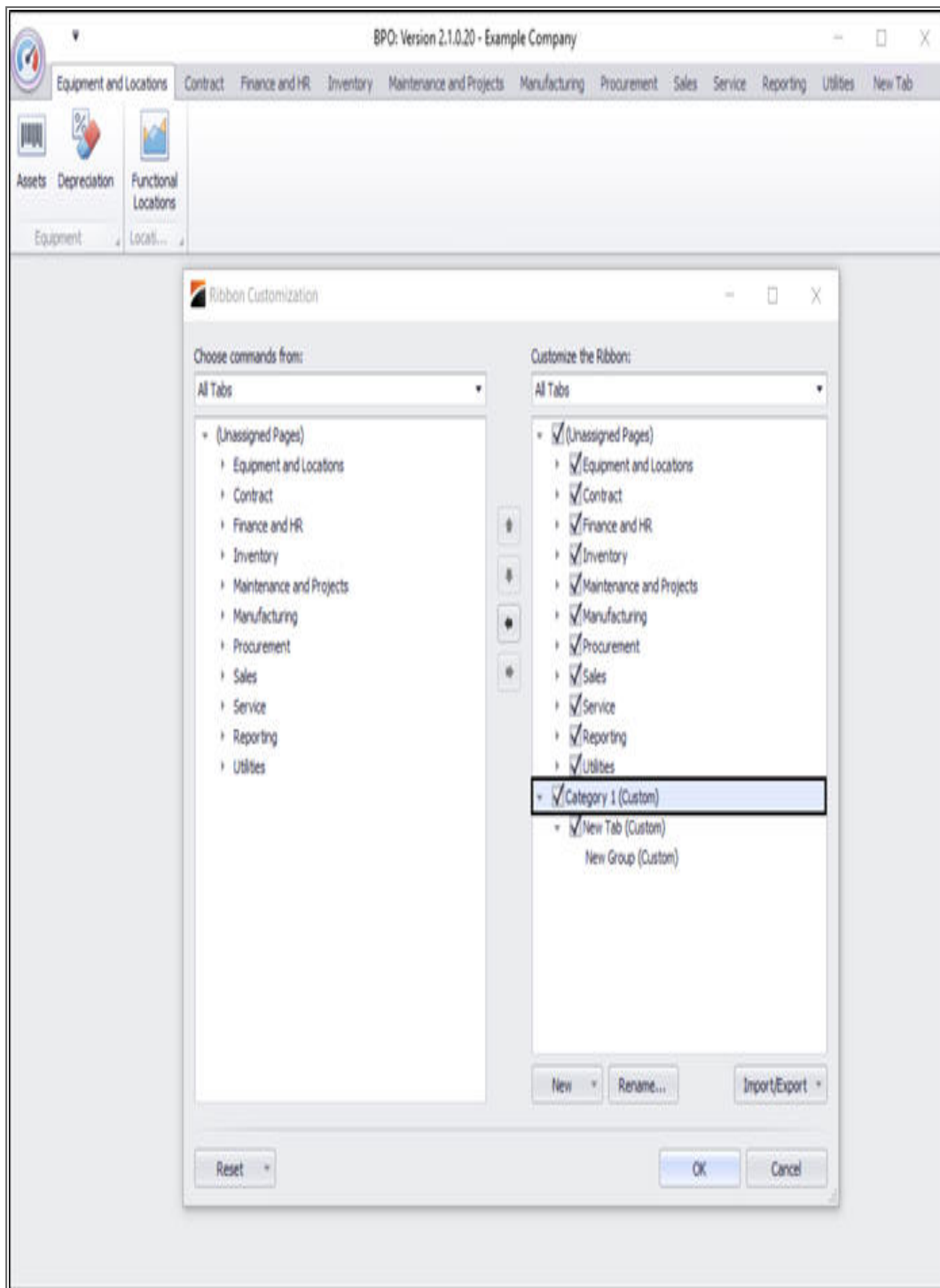
- In this image, the title **Category 1** has been typed.



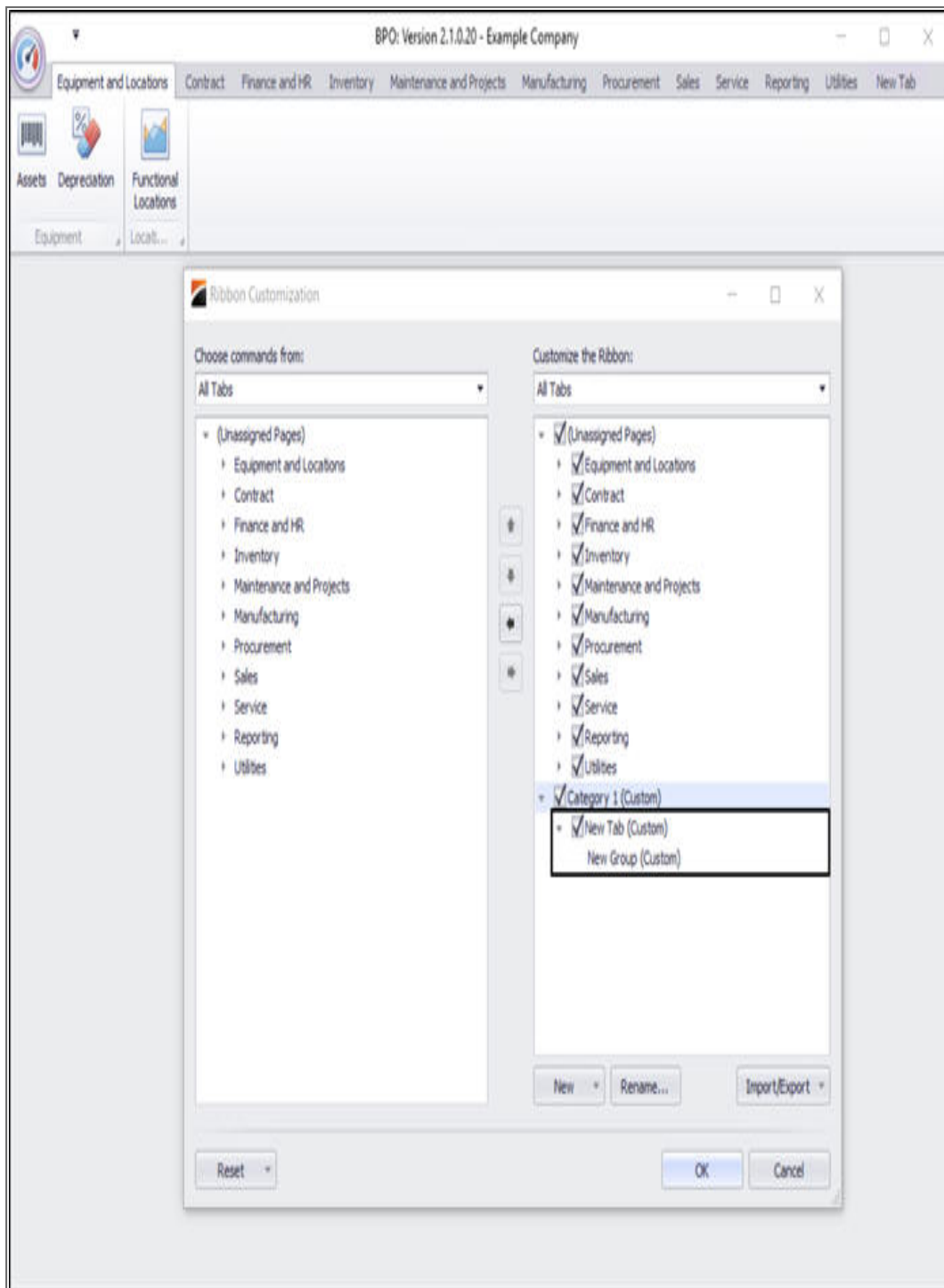
- Click on **Ok** to save your name change.
- Or **Cancel**, if you do not want to save the new name.



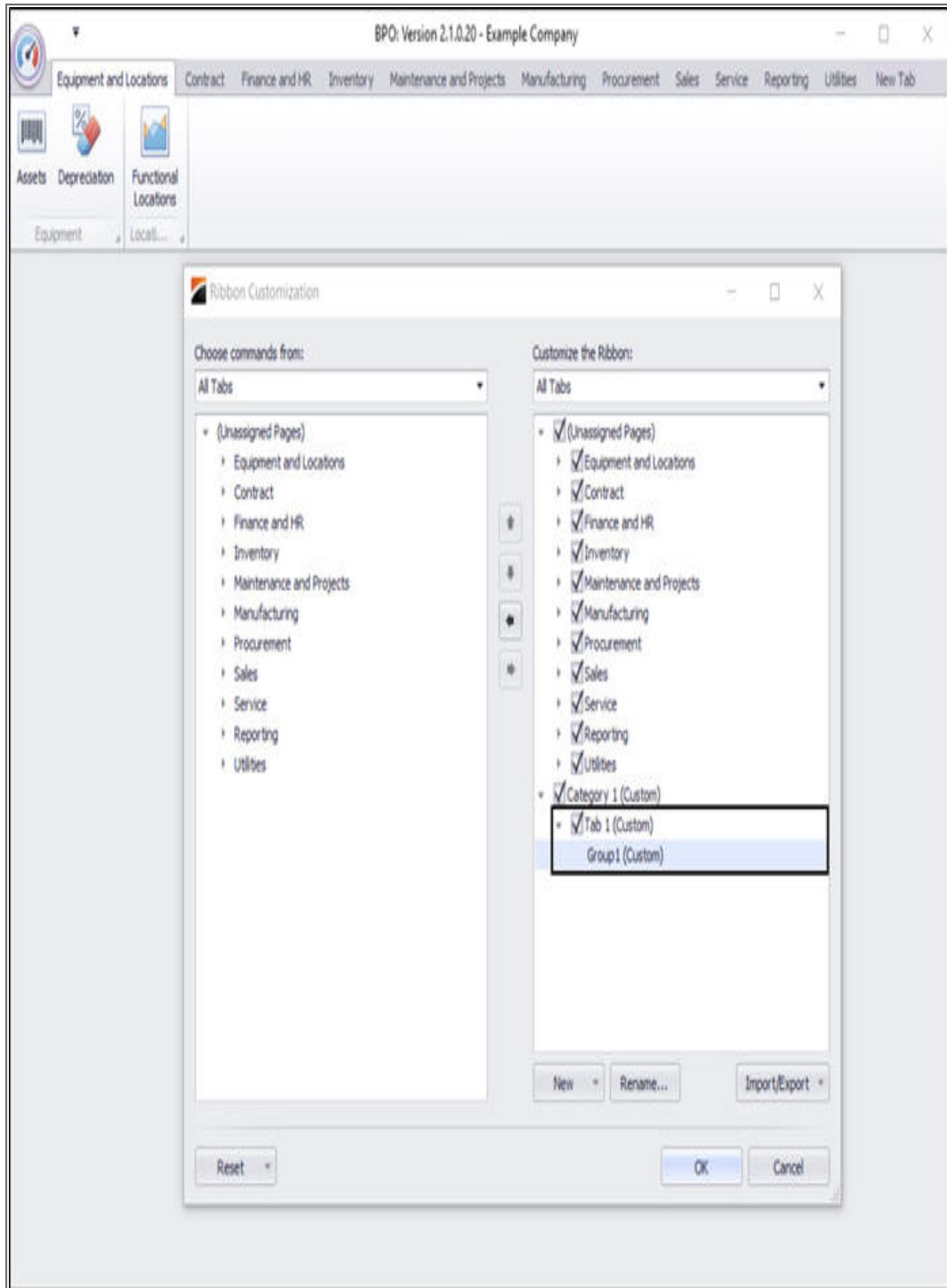
- Your **New Category** has now been renamed and saved as **Category 1** in the **All Tabs** list.



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

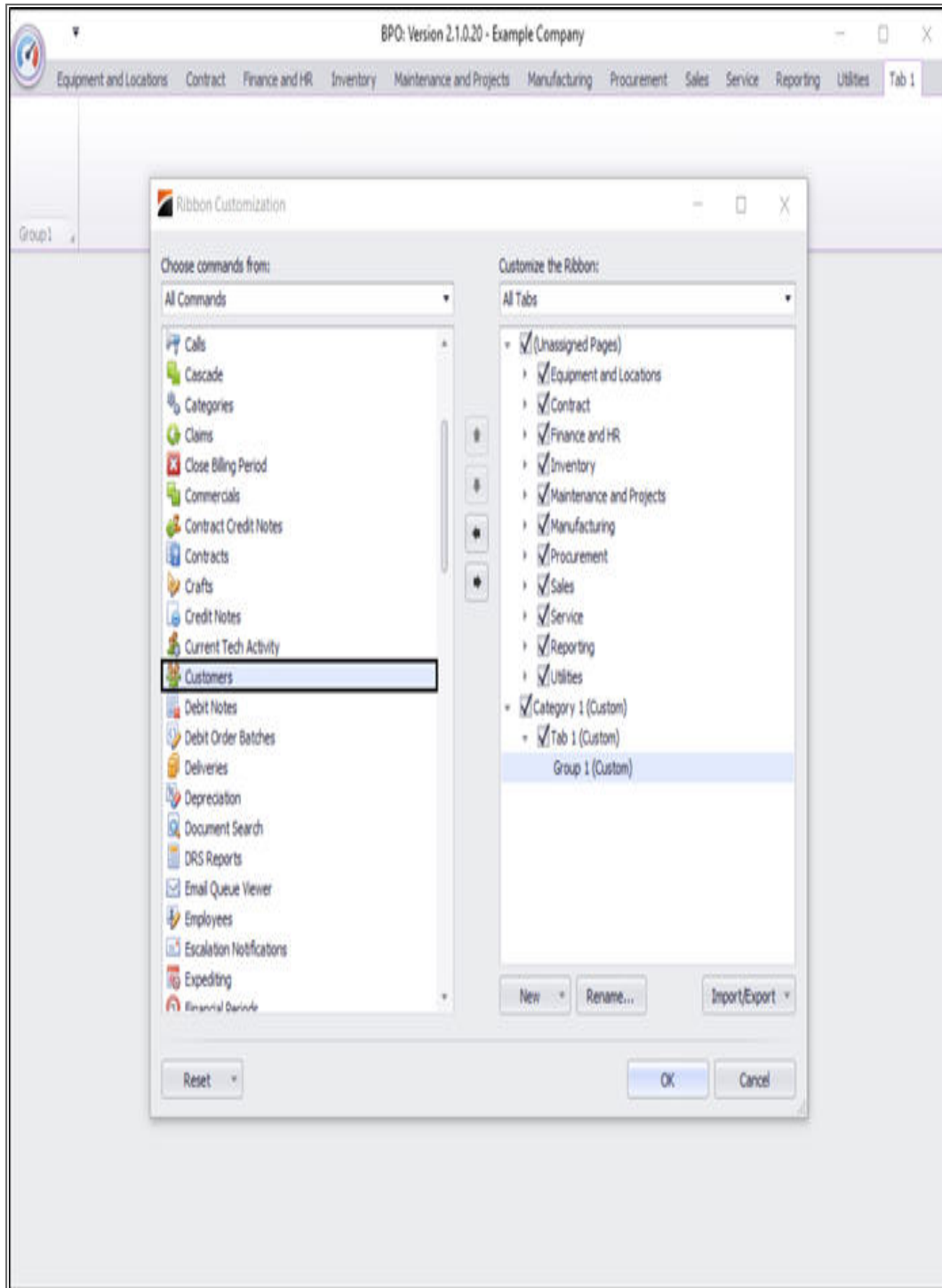


- In this image they have been renamed **Tab 1** and **Group 1** respectively.



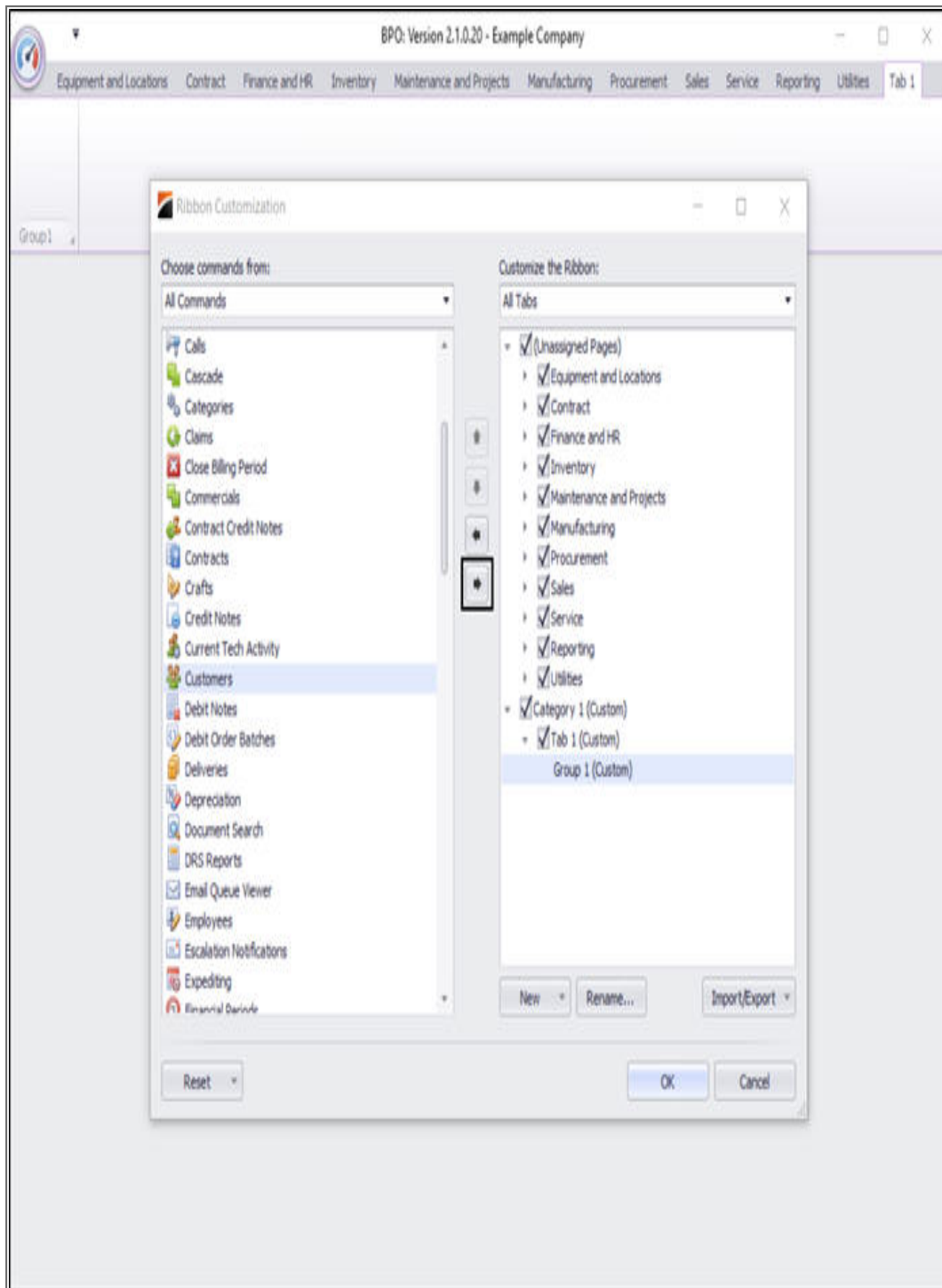
ADD COMMANDS TO A GROUP

- All Categories and All 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.

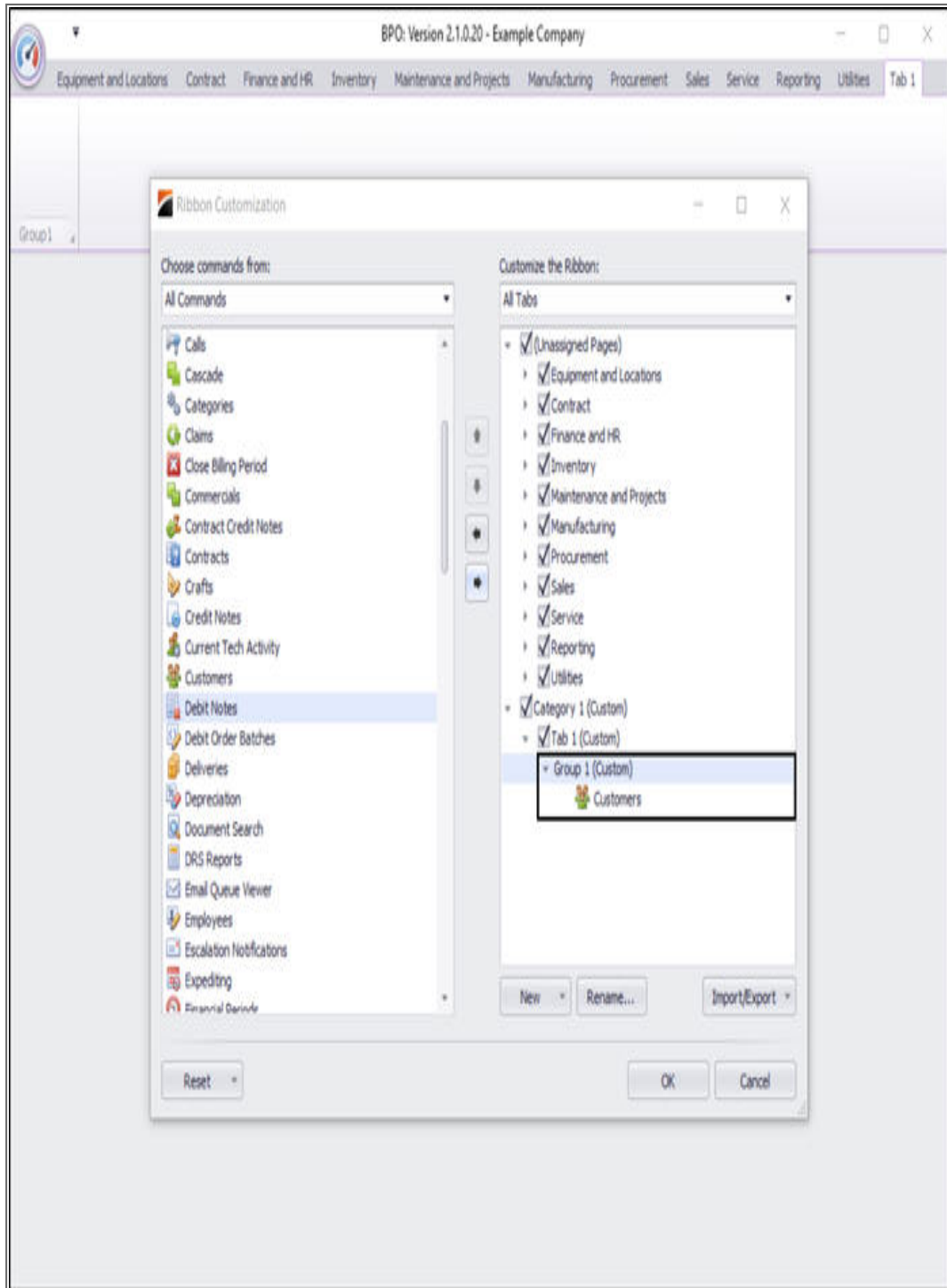


- The right directional arrow has now been activated in the arrow list in the middle of the table.

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

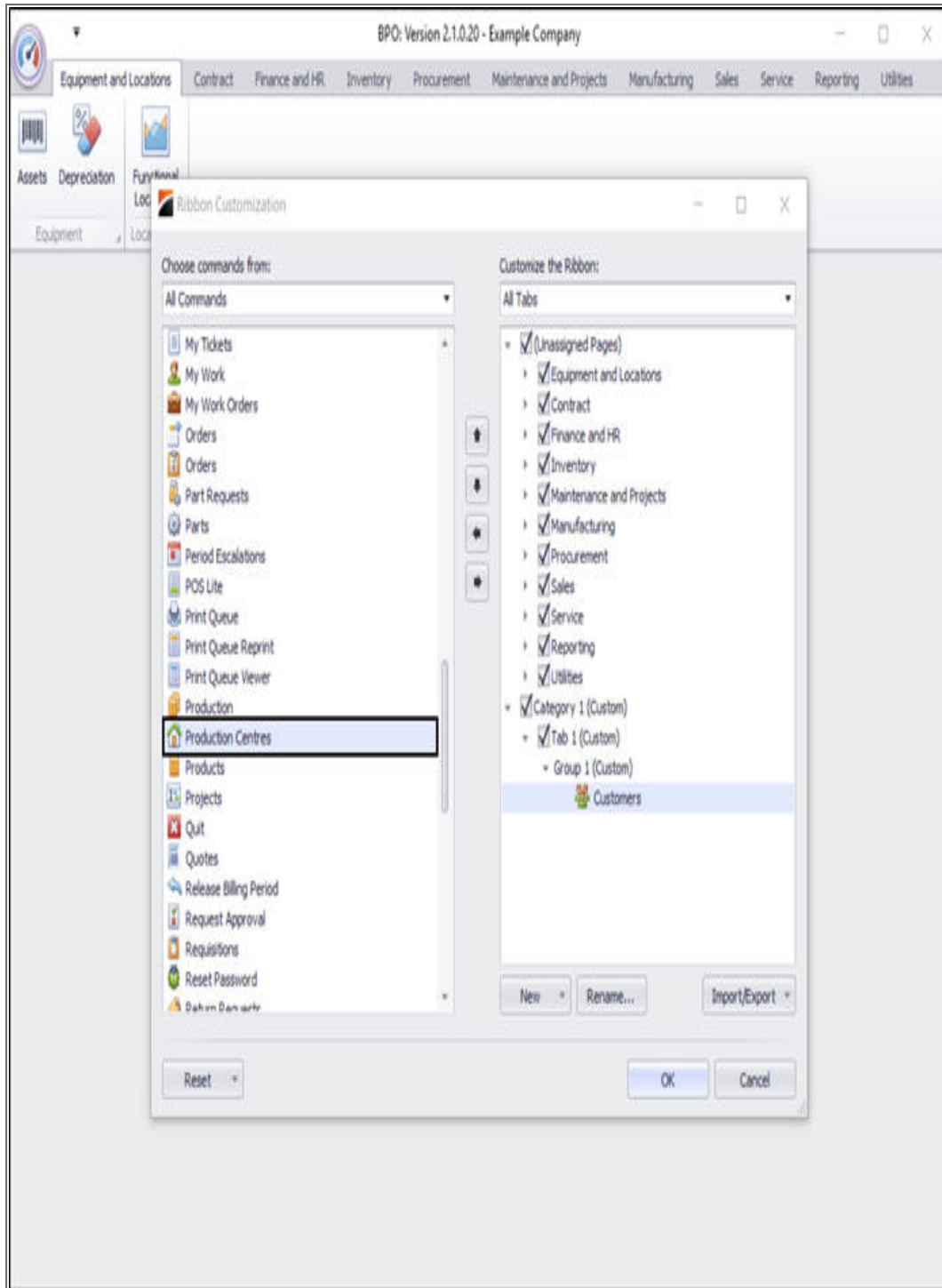


- The **Customers** command has now been added to **Group 1**.



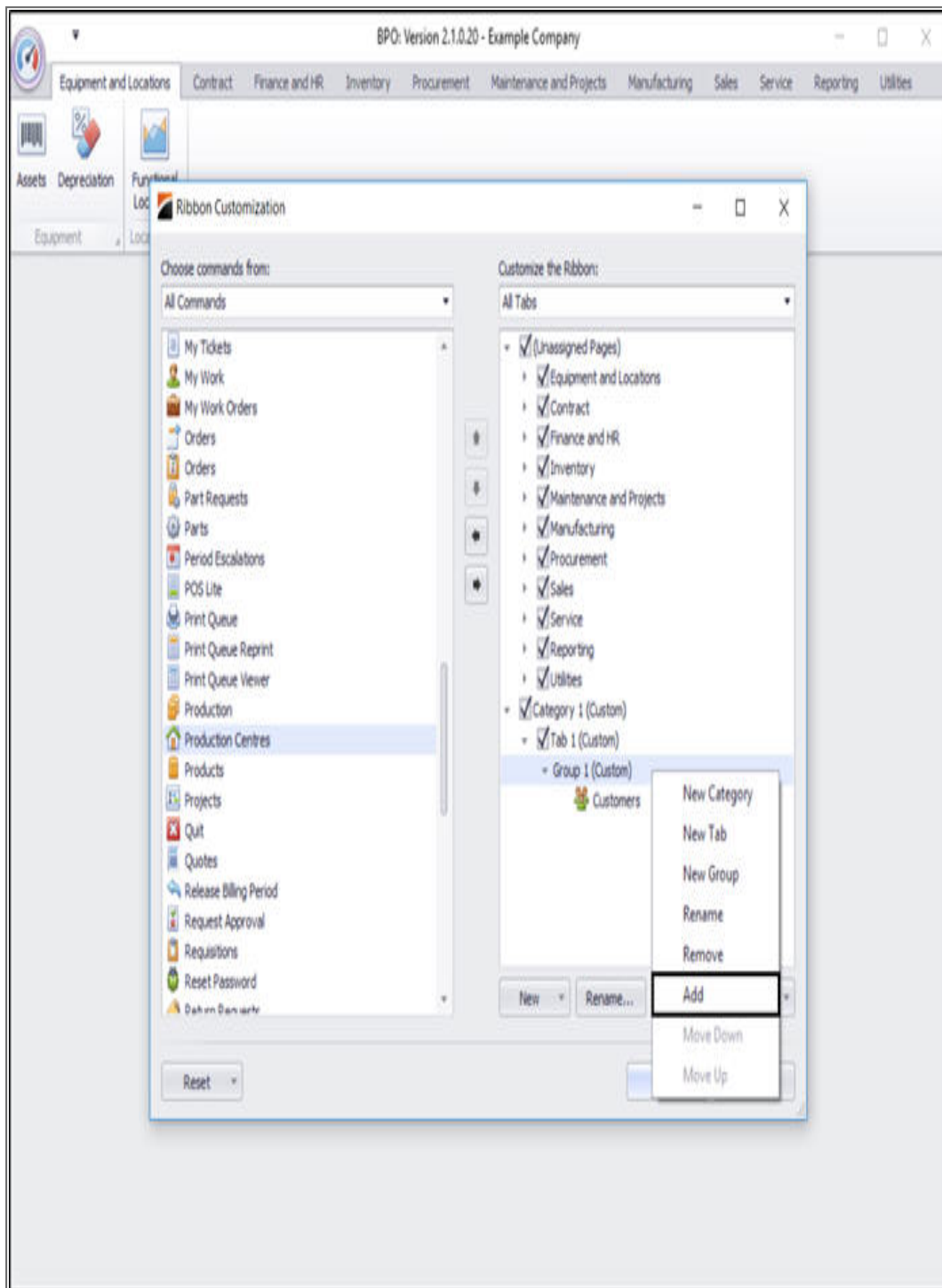
ADD COMMANDS TO A TAB

- 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.

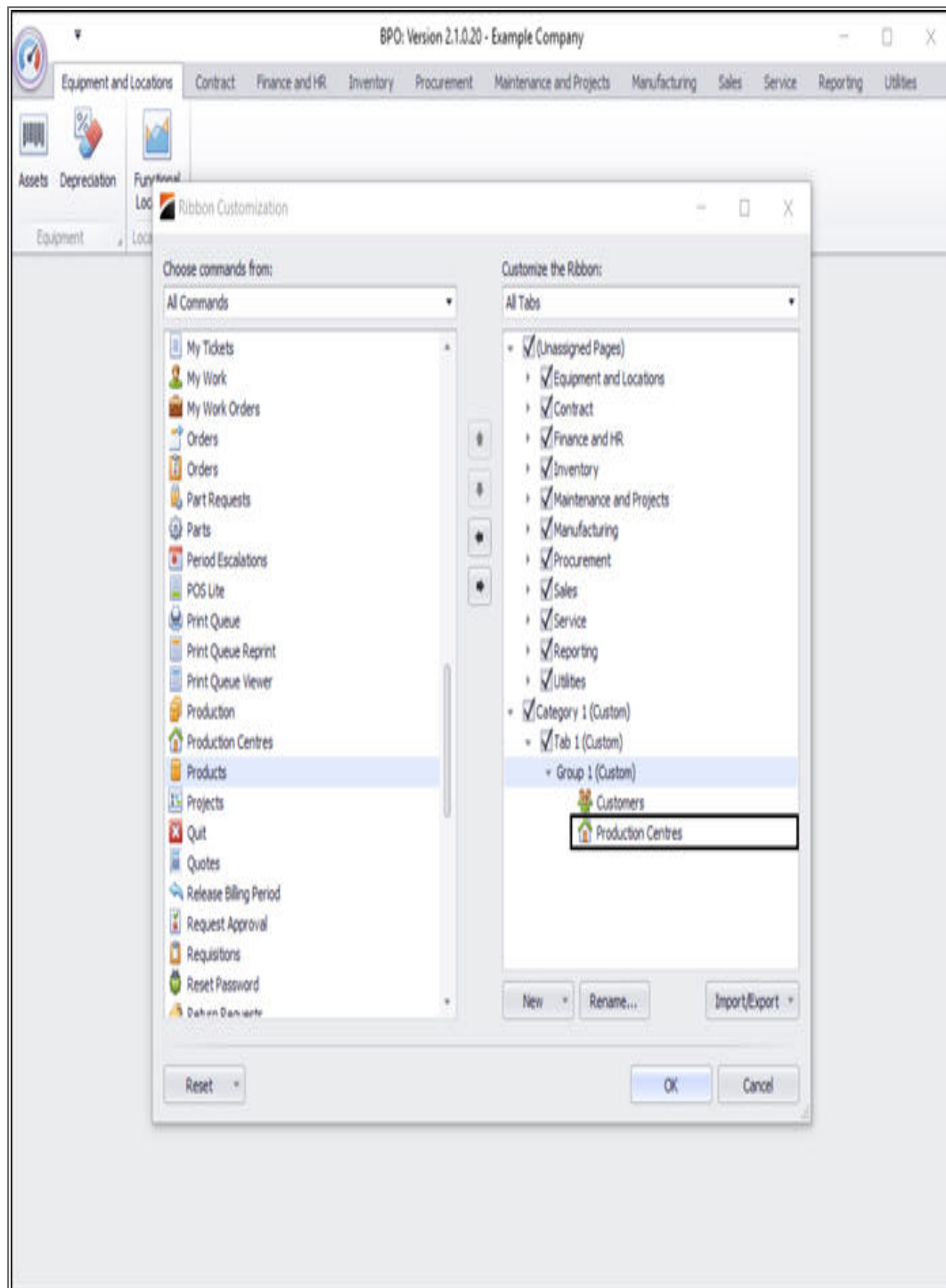


- Now **right click** in the **Customize the Ribbon** list on the **Group** to which you would like to add this command.

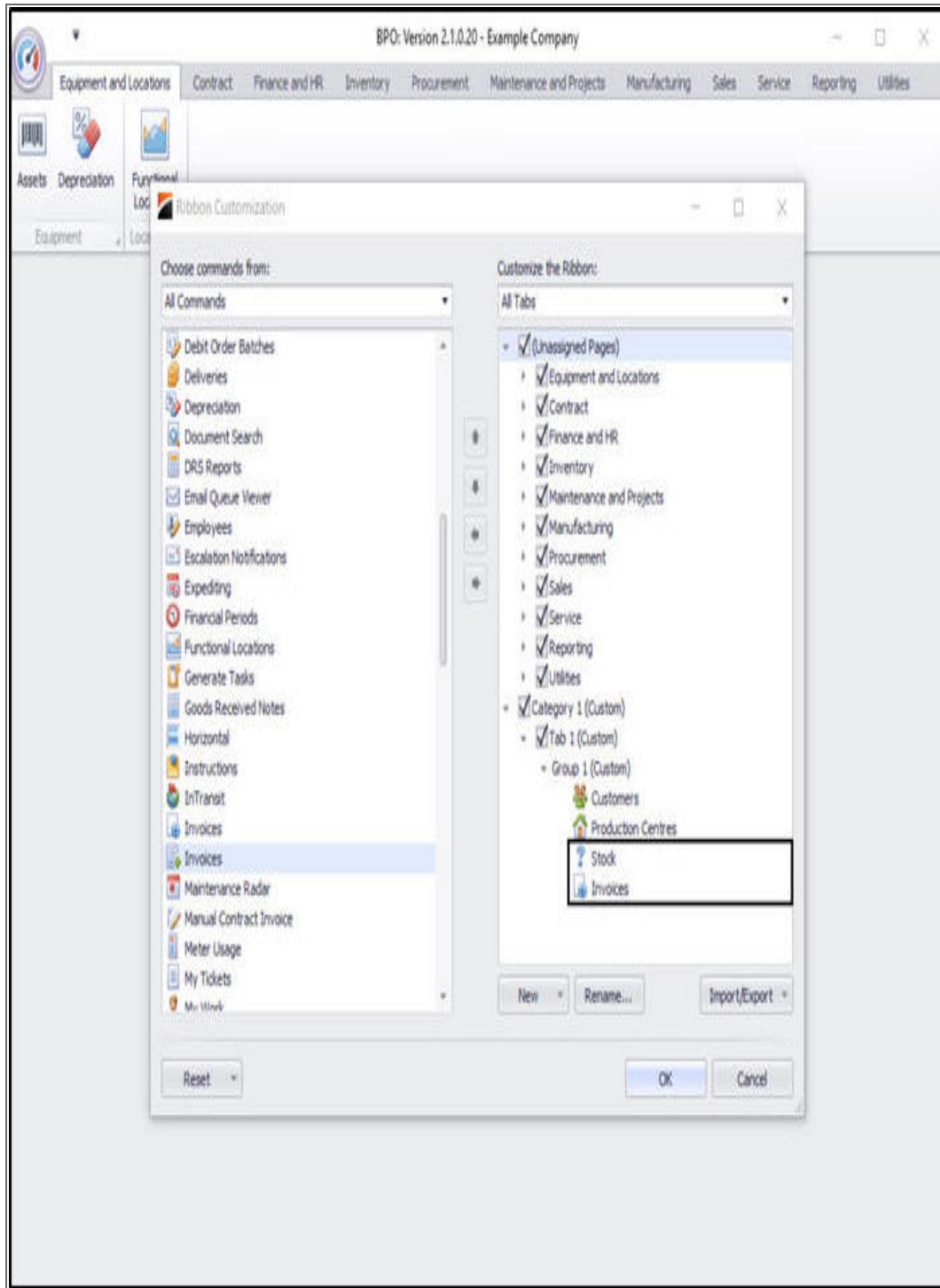
- In this image **Group 1** has been highlighted.
- The pop-up menu will be displayed with an option to **Add**.
- Click on **Add**.



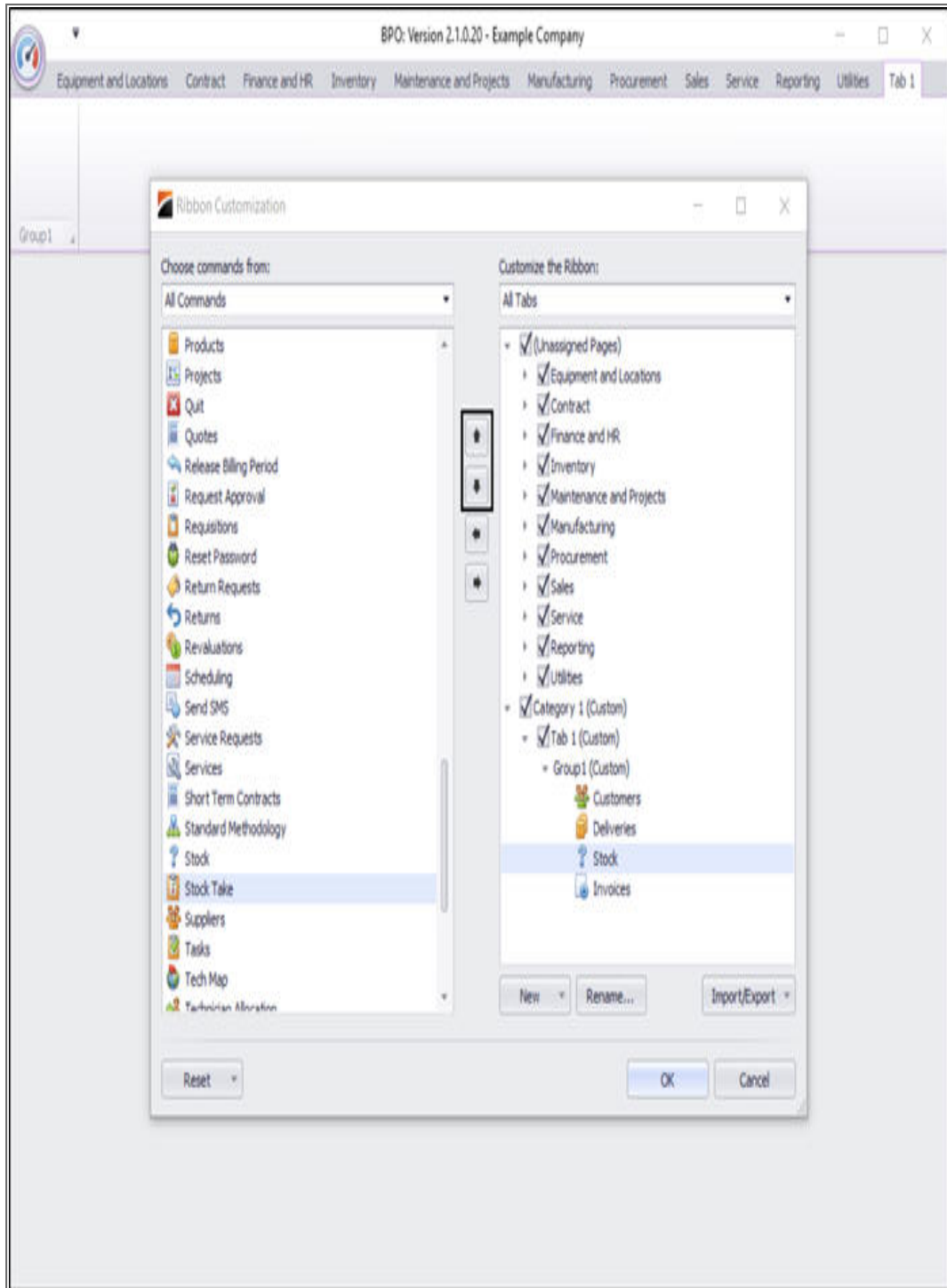
- The **Production Centres** command has now been added to **Group 1**.



- 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**.

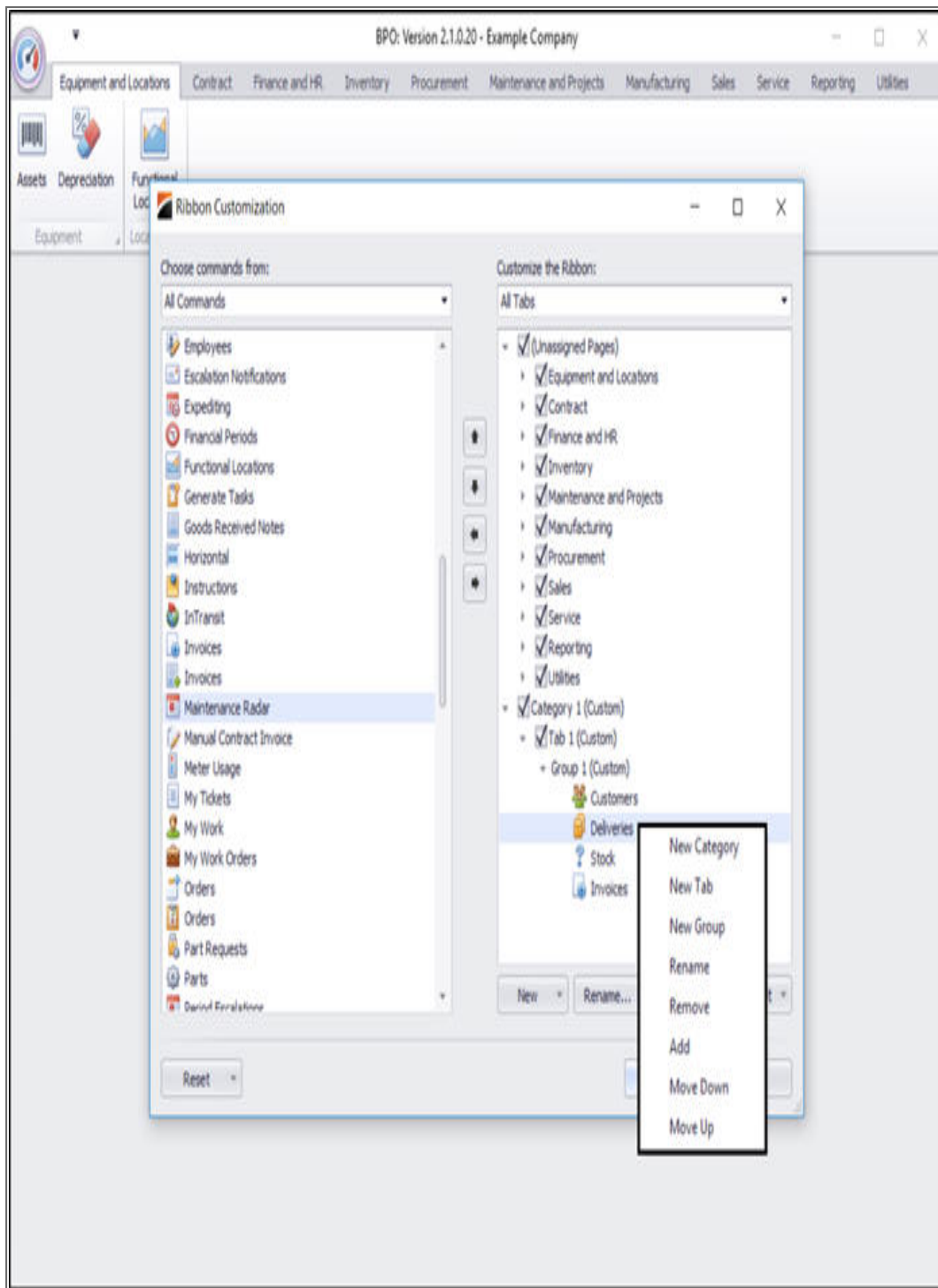


- This list of **Commands** can be re-ordered (as with **Tabs**) according to your preference using the **arrows** in the centre of the screen.

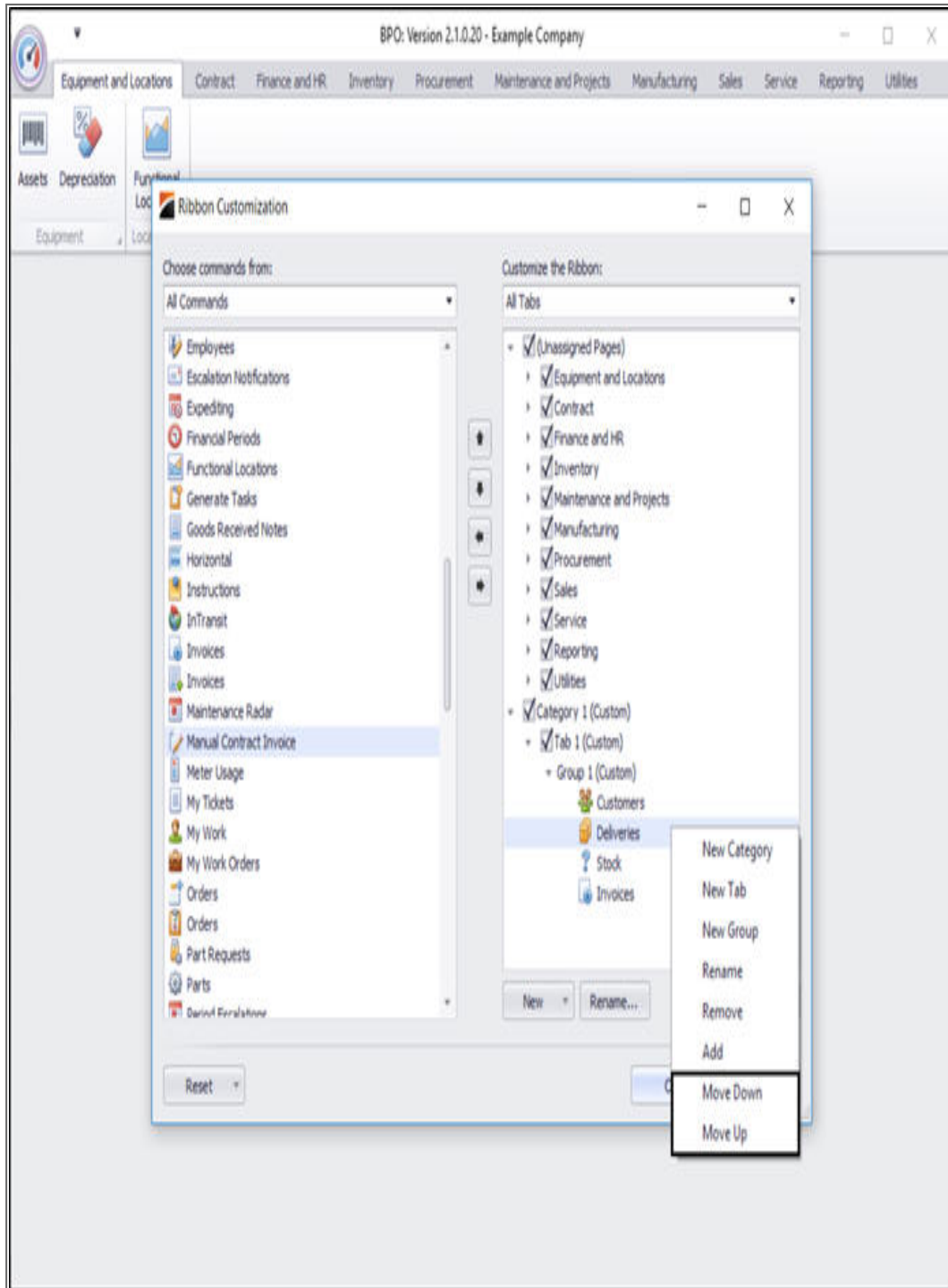


CHANGE THE ORDER OF COMMANDS AND TABS

- 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.

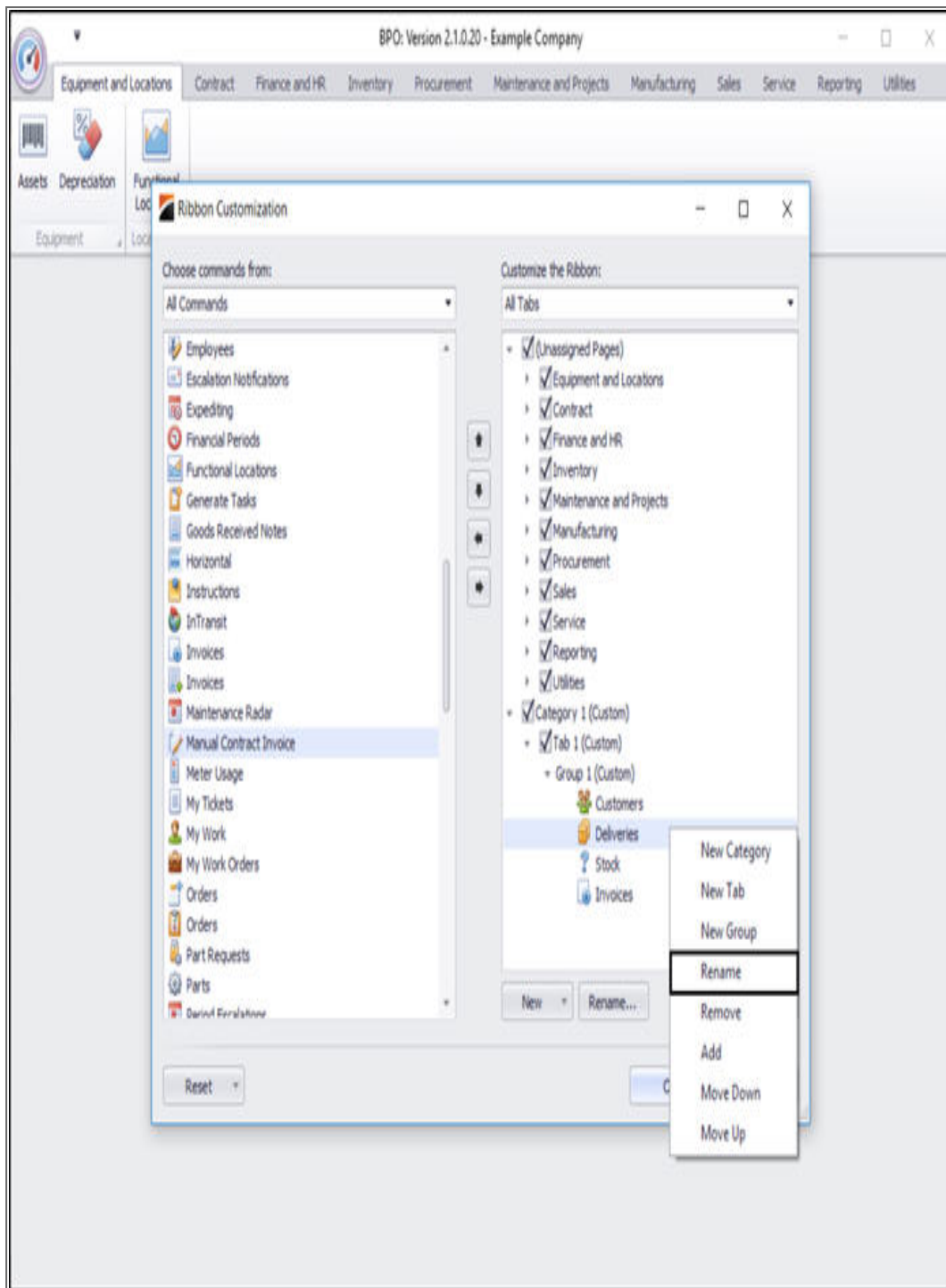


- Select the **Move Up** or **Move Down** option to change the order of the selected command.

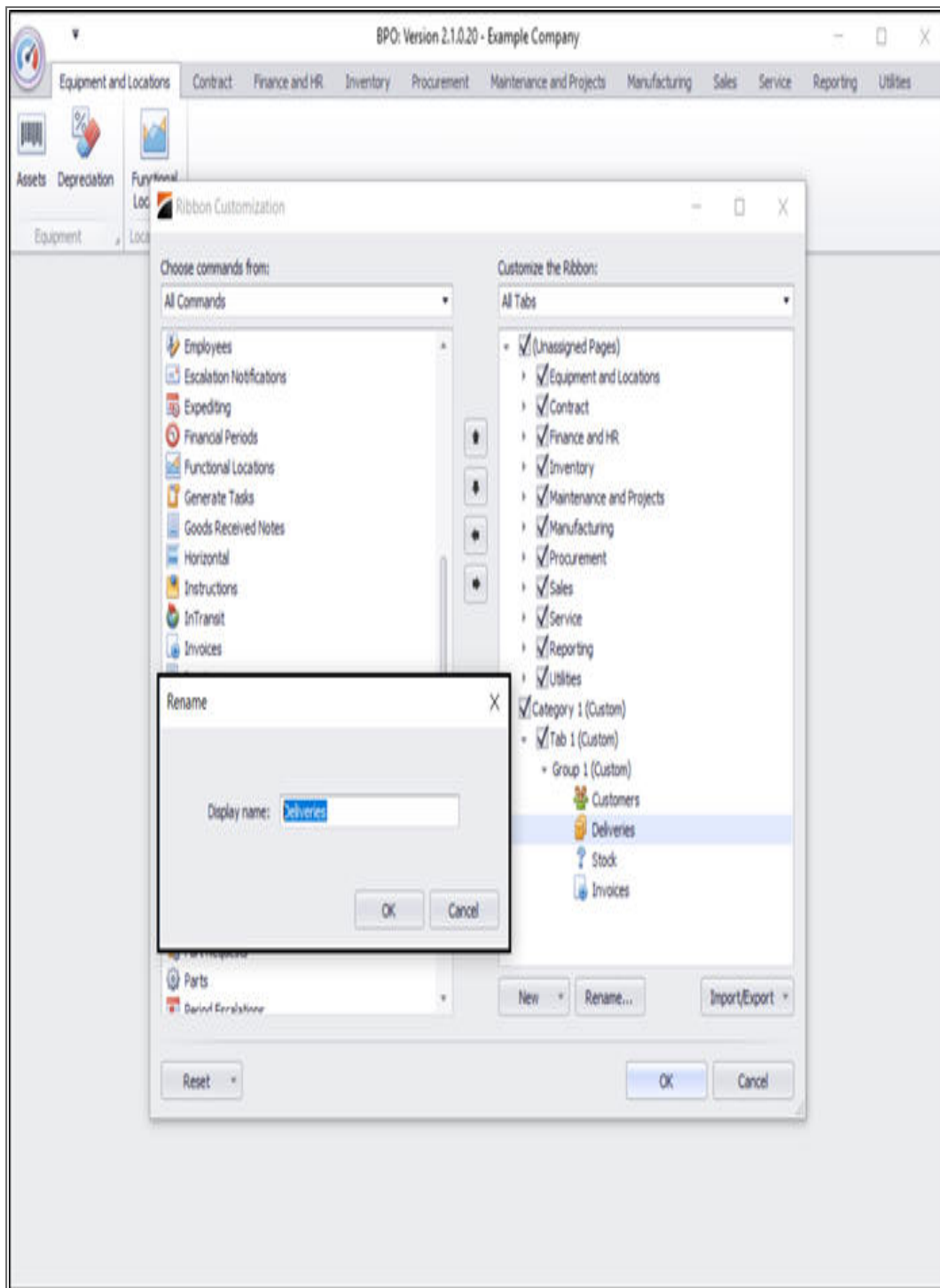


RENAME COMMAND

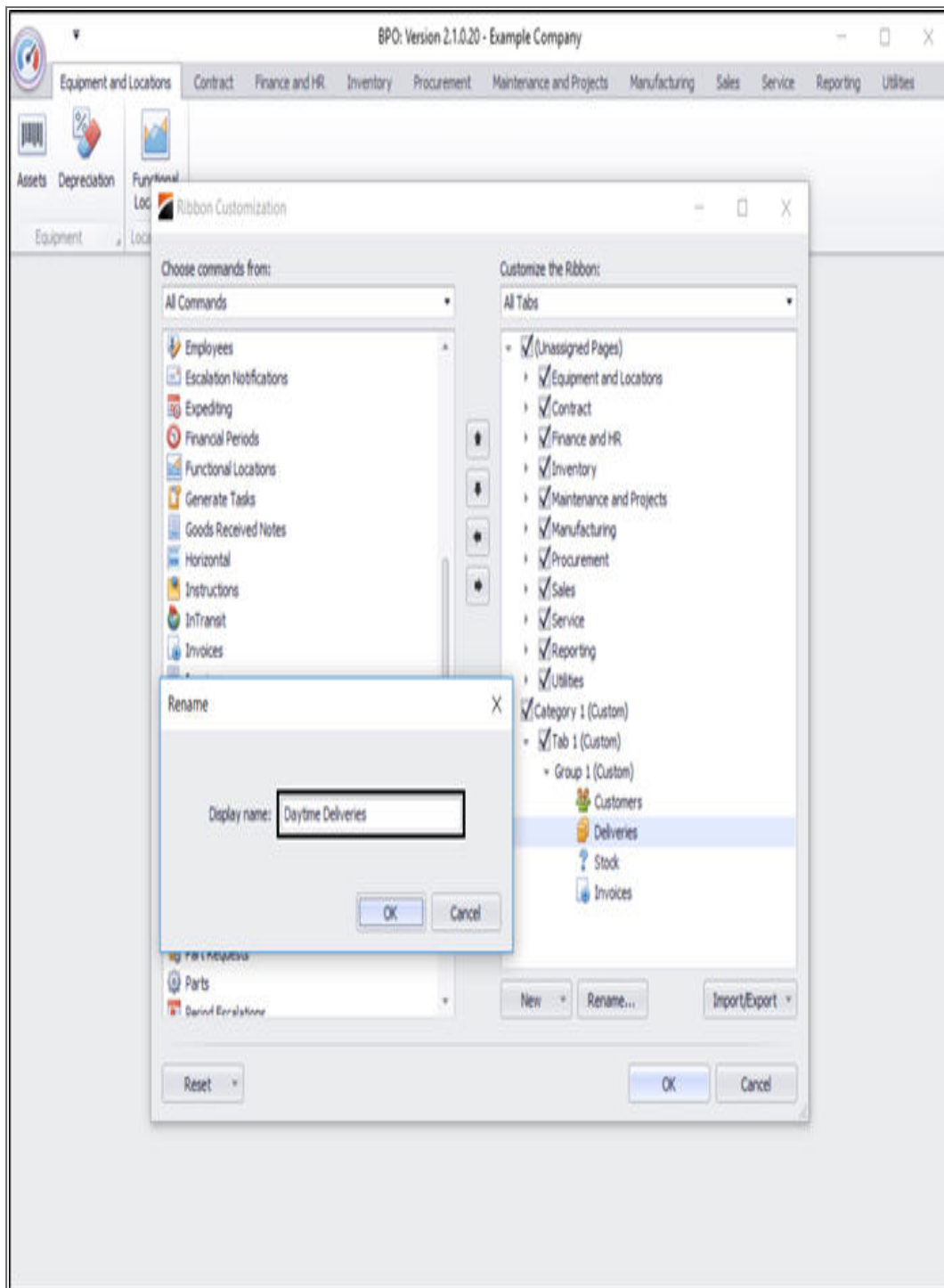
- We can also use this pop-up menu to **Rename** the selected command (as with **Tabs**).
- **Right-click** on your selected command. In this image, **Deliveries** has been highlighted.
- The pop-up menu will be displayed.
- Click on **Rename**.



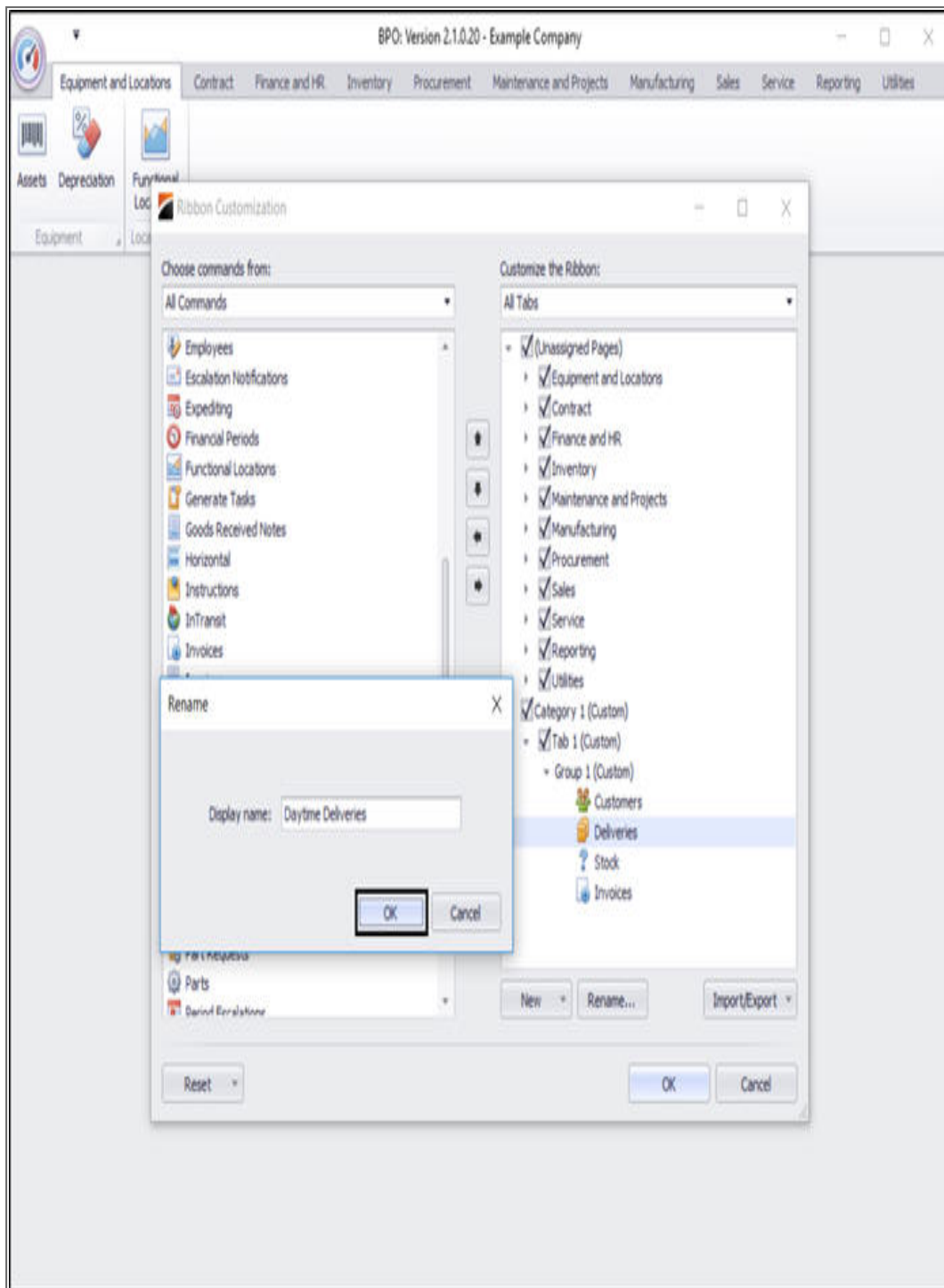
- The **Rename** screen will be displayed.



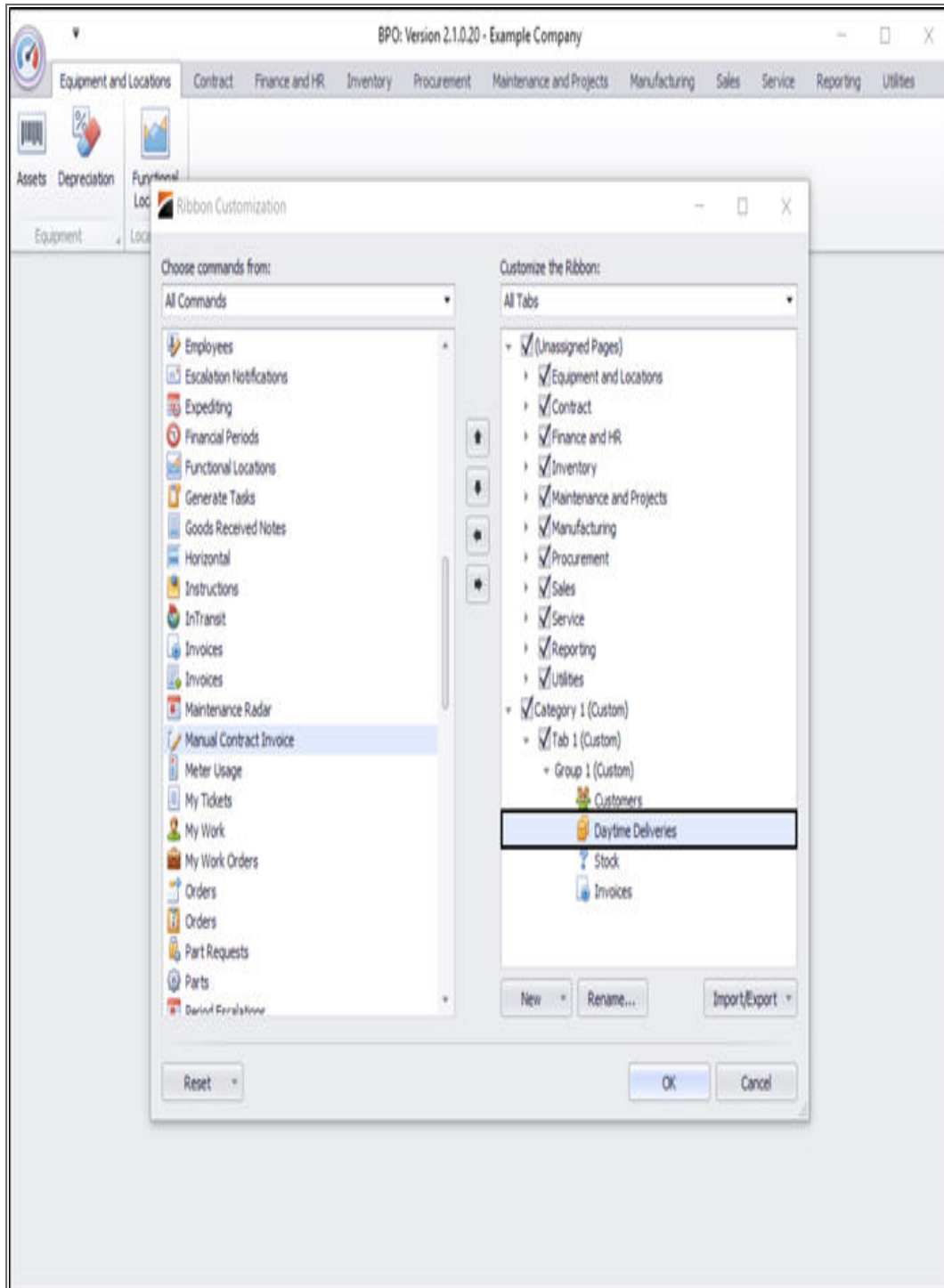
- Type your command name of choice over the auto populated name in the cell.



- Click on **Ok**.

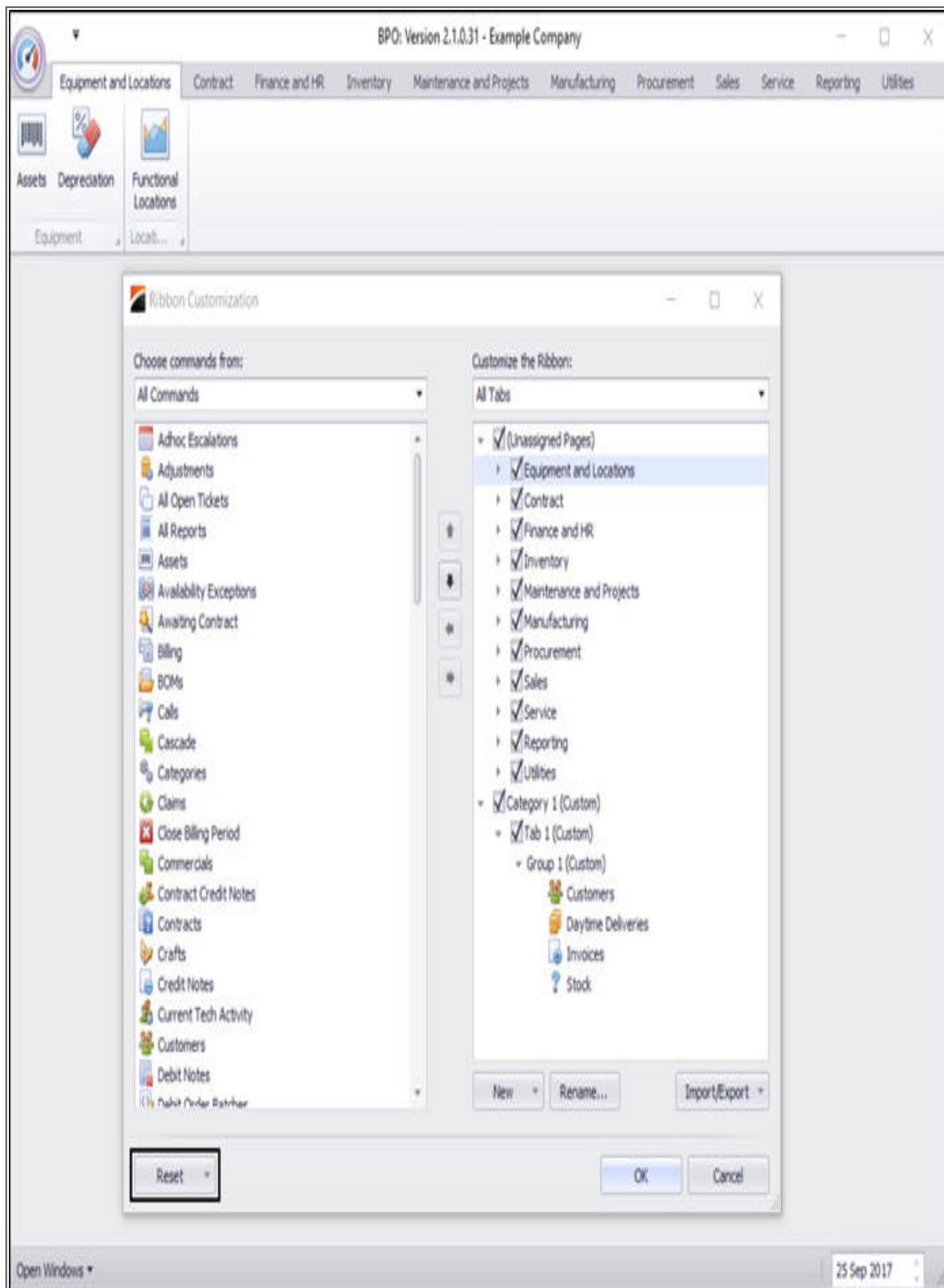


- The new name of the command will now be displayed in the ***Customize the Ribbon*** list.



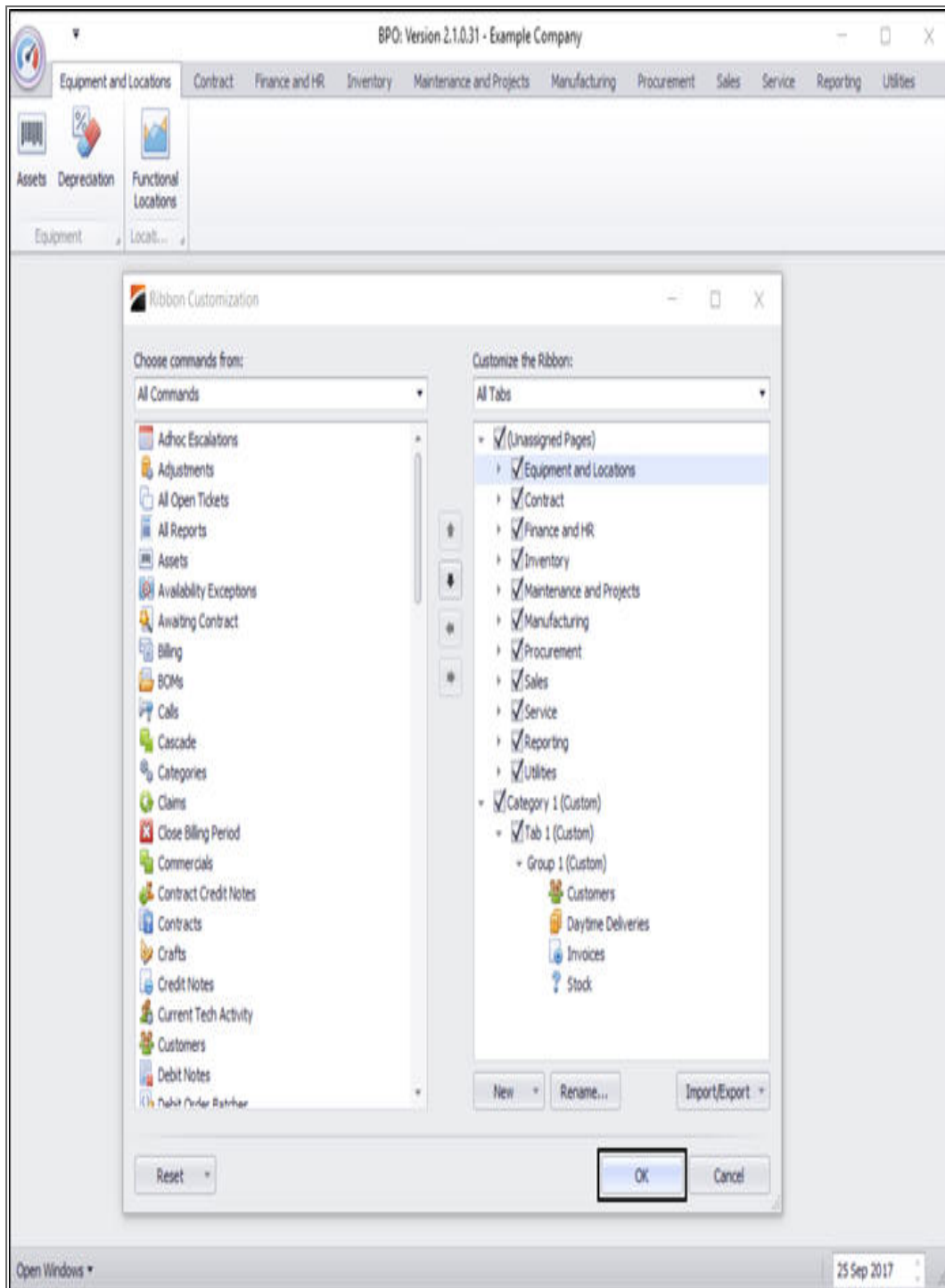
RESET CUSTOMIZATIONS

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

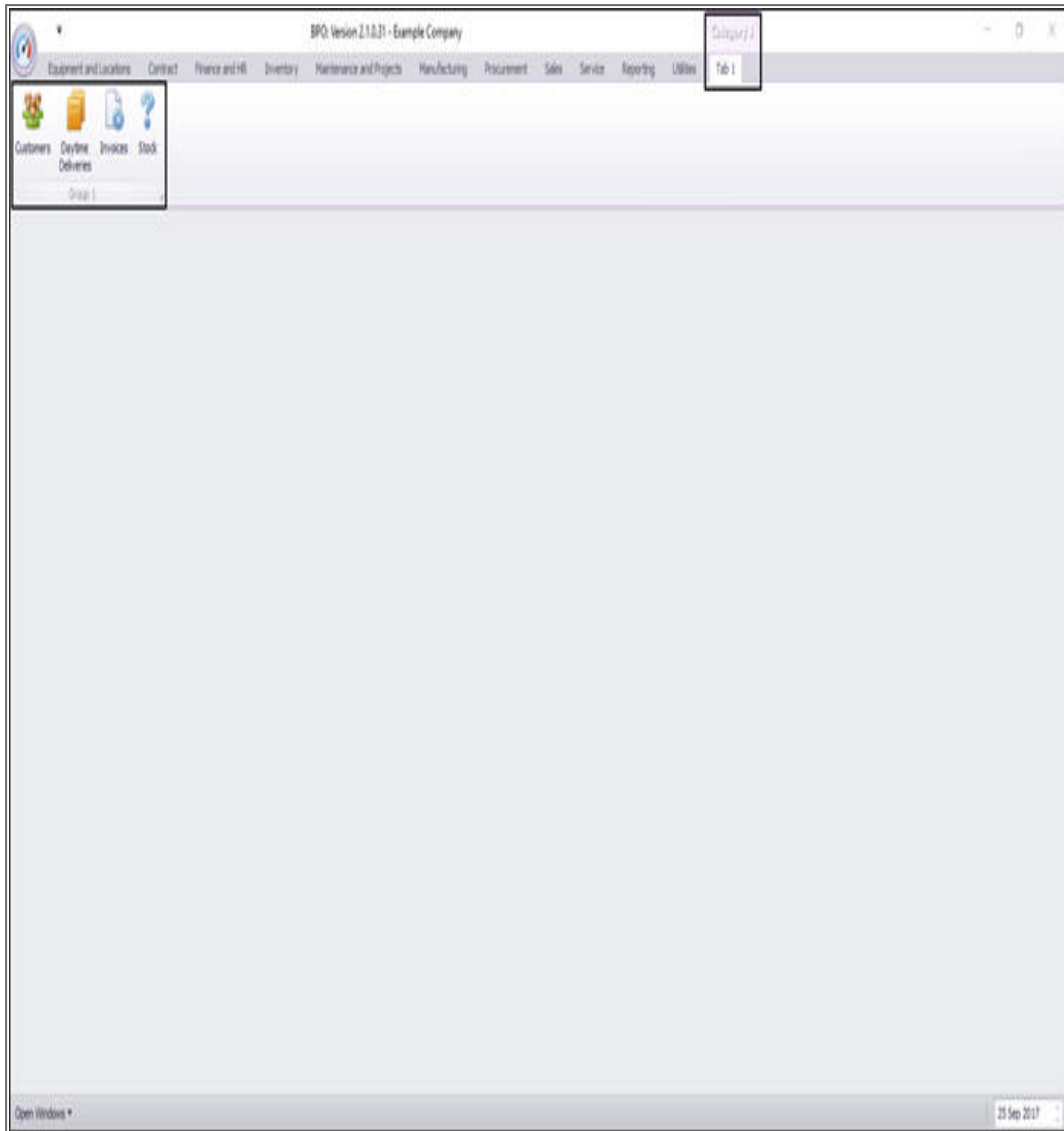


SAVE CUSTOMIZATIONS

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



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



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