Tip 031: Customizing the Ribbon and the Quick Access Toolbar

Primary Audience: All Users

Ribbon:

Instead of menus, EDRMS Content Manager has a Ribbon across the top of the screen that displays Tabs with groupings of commands. The default Ribbon tabs are Home, Search, View, Manage, Administration. You can create, remove, rename, and reorder custom Ribbon tabs, groups and commands as desired.

Quick Access Toolbar:

Customizing the EDRMS Content Manager Quick Access Toolbar will give you quick access to commonly used functions, such as: Tag All, Untag All, Organizations (Internal), Internal Locations, Close All, Reference, Container, Notes. You can add or remove functions as required, and you can set the Quick Access Toolbar to be displayed above or below the Ribbon.

To customize the Ribbon:

1. Right click in the Ribbon area and select Customize the Ribbon.

2. On the Customize Ribbon popup, make a selection from the Choose commands from dropdown to narrow the set of commands to choose from.
   - Selecting a tab (File, Home, Search, View, Manage, Administration) will display a list of commands available for that group of functions.
   - There is also a series of general command groups (Record, Classification, Thesaurus Terms, Location, Schedule, Record Action, Offline Records) that can be added to the Ribbon.
3. To add a new tab:
   a. Click **New Tab**. You will see **New Tab (Custom)** added to the list.
   b. Select the new tab in the list and click **Rename**.
   c. Give the new tab a name.
d. Click OK.

4. To delete all customizations and reset the default settings:
   a. Select Reset only selected Ribbon tab from the dropdown, and then select a tab from the Choose commands from menu to reset only customizations from that tab, or
   b. Select Reset all customizations from the dropdown to reset all Ribbon and Quick Access Toolbar customizations.

5. To customize keyboard shortcuts, click Keyboard shortcuts: Customize and make selections from the categories and commands below.

6. To show large icons on the ribbon, which makes them more visible and easy to identify, check Show all the icons on the ribbon always large.
To customize the Quick Access Toolbar:

1. Right click on the Ribbon or the Toolbar.
2. Select Customize Quick Access Toolbar.
3. Select Commands on Tabs from the Choose Commands From dropdown.
4. Select a command from the available commands list and click Add to copy it over to the Quick Access Toolbar commands list. Use the up and down arrows to change the order of the command in the list.

5. Click Remove to remove a command from the list.
6. Select Show Above the Ribbon or Show Below the Ribbon to set where you want the Quick Access Toolbar to be displayed.