

## Customizing the User Interface

Axiom

**AXIOM**

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# Customizing the User Interface

You can customize the Axiom user interface by creating custom task panes and custom ribbon tabs, and then assigning them to users and roles. Many of the built-in task panes and ribbon tabs can also be customized, including the main Axiom ribbon tab.

Generally speaking, the creation of custom task panes and ribbon tabs is an administrator function. The intent is for administrators or other power users to create the custom task panes and ribbon tabs as needed for their end users, and then assign these items as startup files in Axiom Security.

## About custom task panes and ribbon tabs

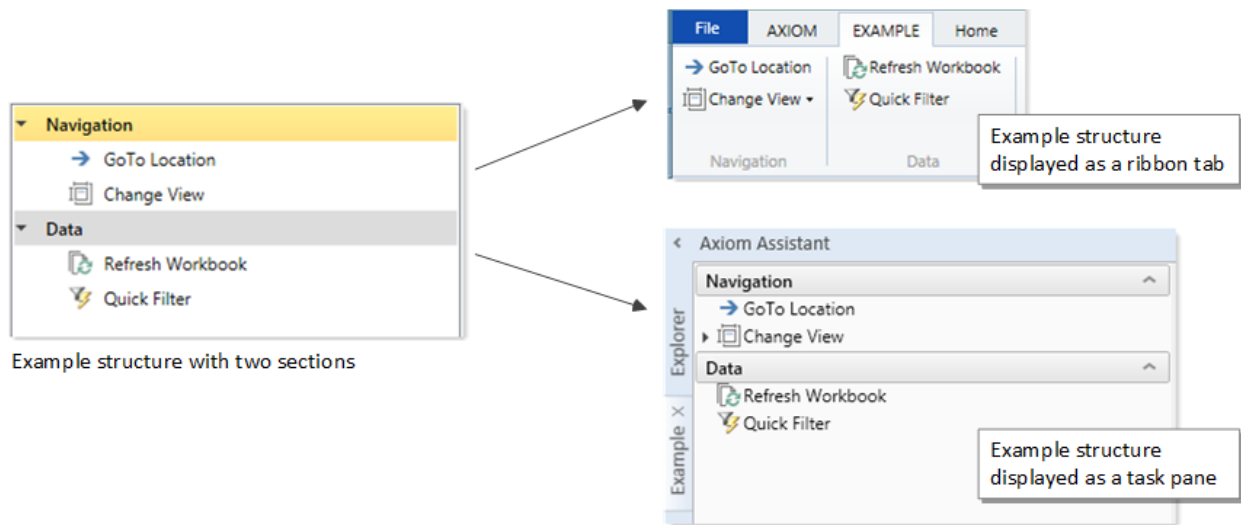
Using custom task panes and ribbon tabs, you can provide your users with a user interface designed especially for them.

### ► Defining custom task panes and ribbon tabs

Task panes and ribbon tabs are stored as AXL files in the Task Panes Library and in the Ribbon Tabs Library respectively. Task panes and ribbon tabs are created in a very similar manner. Both use a multi-level structure, with top-level "sections" that can contain one or more child items.

- In the task pane environment, the top-level section is displayed as a gray header bar which can be collapsed and expanded to access the child items in the section.
- In the ribbon environment, the top-level section is displayed as a ribbon group, and the child items in that section display as buttons in the group.

The following example shows how the same basic structure is rendered as a ribbon tab and as a task pane.



Task panes and ribbon tabs can contain the following items:

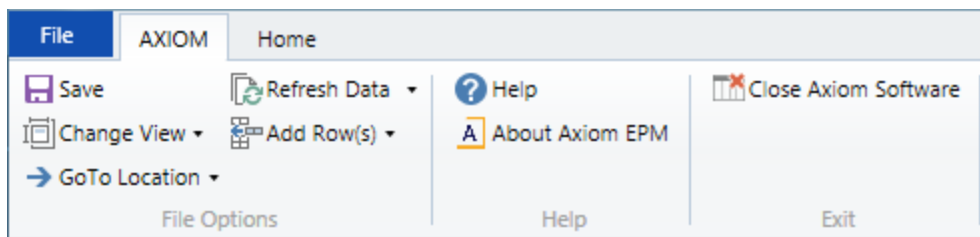
- Links to file groups, files, and folders in Axiom, so that users can open these items from the task pane or ribbon.
- Various Axiom feature commands from the Command Library, so that users can launch the feature from the task pane or ribbon.
- Plain text items for header and group titles, and for instructional text (such as in a task pane that provides instruction for a process).

Security permissions apply to all items in task panes and ribbon tabs. If a file or feature is placed in a task pane or ribbon tab, but a particular user does not have the appropriate security permissions for that item, then that user will not be able to use that item. The item will either be hidden or it will display as grayed out, depending on whether the **Show restricted item** option is enabled for that item in the task pane or ribbon tab.

### ► Common uses of custom task panes and ribbon tabs

The most common use of custom task panes and ribbon tabs is to provide users with a custom user interface. For example, you may want to streamline the user interface so that end users only see the specific Axiom features that they need to use. You can do this by customizing the "built-in" Axiom ribbon tab, and/or by creating and assigning additional custom ribbon tabs and task panes to users and roles.

For example, some clients might want to create a very simple version of the Axiom ribbon tab for their end users, something like the following:



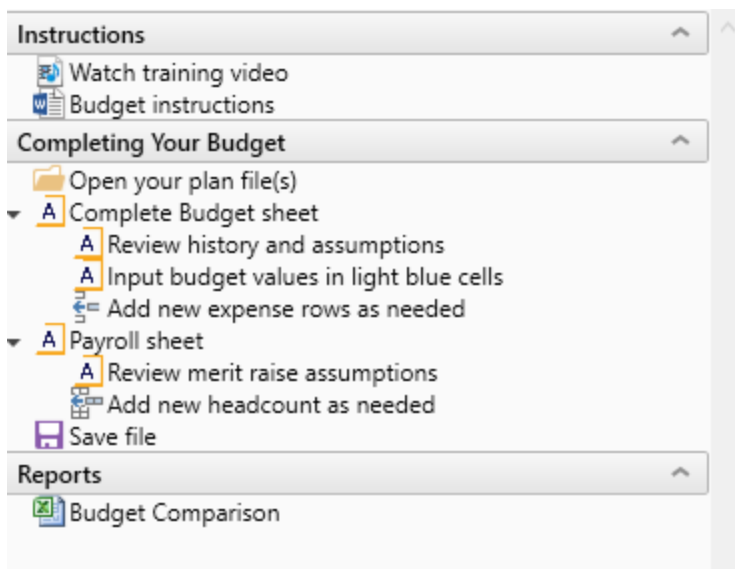
End user roles could be assigned this simple ribbon tab, while administrators and power users continue to use the default Axiom ribbon tab. Notice in this example that no file groups are listed on the ribbon and there's no Reports button—this sort of design would depend on users accessing their plan files and reports via links on the home page, or by using the Explorer task pane or a custom task pane. This example is intentionally very simple to illustrate the full range of possibilities between the default ribbon tab and a minimal one.

Other typical uses include:

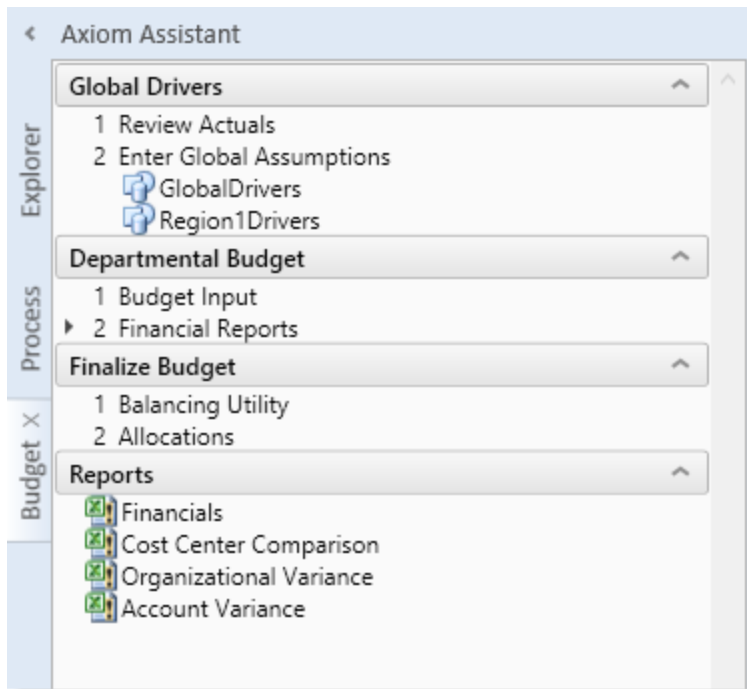
- Providing easy access to certain files, such as a list of frequently-used reports. This list could be presented in a reporting task pane so that users do not need to navigate the Reports Library to access these reports.
- Providing user instruction for various processes. For example, you could provide a task pane that walks the user through the steps needed to open their plan file, edit their plan file, and then submit their plan file for review.

**NOTE:** Custom task panes do not provide full process management; they are intended more as a casual guide for users. If you want to define a process with enforced task order and ownership, including an audit trail for when a task was completed and by whom, then you should use the Process Management feature.

The following is an example task pane that could be made for end users to complete their budgets. Although it would be possible to do this as a ribbon tab, use of text instruction for a process is better suited for a task pane.



The next example task pane would be intended for administrators and other finance "power users." It collects all of major files and utilities that these users need to manage the budget process.



### ► Assigning custom task panes and ribbon tabs to users and roles

The primary method of using custom ribbon tabs and task panes is to assign them as startup files in Axiom security to certain users and roles. When a custom ribbon tab or task pane is assigned as a startup file, then it automatically opens when the user starts Axiom.


Axiom provides certain "built-in" custom task panes and ribbon tabs that are automatically assigned to the Everyone role by default, such as the Axiom ribbon tab or the Explorer task pane. You can use these built-in items as is, or you can customize them as desired and change their security configuration. For more information, see [Built-in task panes and ribbon tabs](#).

For task panes only, you can also choose to give users and roles direct access to certain task pane files in the Task Panes Library (by granting permission on the Files tab of Axiom security). These users can then open these task panes "on demand" as needed. This is a good option for task panes that only need to be used occasionally rather than all the time. Ribbon tabs cannot be used in this way because the contents of the ribbon are determined at startup. It is not possible to open a ribbon tab in the ribbon "on demand".

For more information, see [Assigning ribbon tabs to users](#) and [Assigning task panes to users](#).

# Task panes

You can use custom task panes to provide users with a custom user interface in the Excel Client or the Windows Client. For an overview of how the Axiom user interface can be customized, see [About custom task panes and ribbon tabs](#).

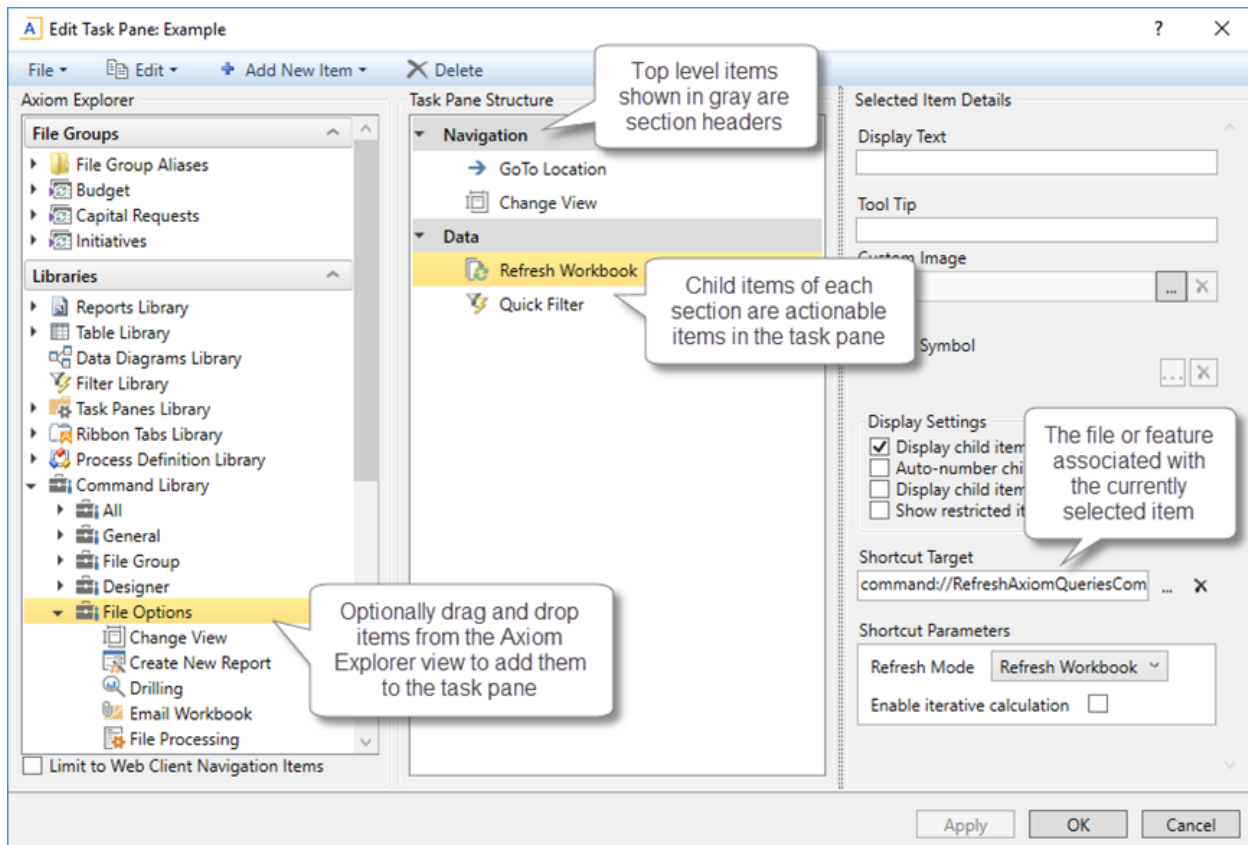
This section explains how to create, edit, and delete custom task panes, and then assign them to end users. Task panes are managed using the Task Panes Library within Axiom Explorer. Task pane files display using the task pane icon .

In addition to creating your own custom task panes, you can customize the built-in task panes provided by Axiom, such as the Explorer task pane and the Process task pane. For more information, see [Built-in task panes and ribbon tabs](#).

**NOTE:** It is also possible to use an Axiom form as a task pane. In this case, the Axiom form displays within the task pane area and is considered a "dialog" for behavior purposes (such as for storing and sharing "form state" values). For more information, see the *Axiom Forms and Dashboards Guide*.

## Task pane editor

You can create and edit custom task panes using the **Edit Task Pane** dialog. This dialog has three sections as shown in the following example screenshot.



*Task pane editor*

The middle section, labeled **Task Pane Structure**, is where you define the sections and individual items to display in the task pane. To add new items to this structure, you can either:

- Use the **Add New Item** button in the toolbar to add new items. You can choose to add a new child item to the currently selected item, or add a new item at the same level, or add a new section-level item.
- Use the right-click menu to add new items. This has the same options as the Add New Item button.
- Drag and drop an item from the **Axiom Explorer** pane (the left-hand section of the dialog) to the desired location in the task pane structure. This will automatically link the item in the task pane structure to the appropriate feature or file (based on what you dragged and dropped).

When you select an item in the task pane structure, the properties for that item display in the right-hand section of the dialog, labeled **Selected Item Details**. Here you can define display text and other display properties for each item, and assign the associated feature or file for the item using the **Shortcut Target**. (When you drag and drop an item from the Axiom Explorer pane to the task pane structure, the shortcut target is automatically assigned.) For more information on the available properties, see [Task pane properties](#).

You can move items in the task pane structure by dragging and dropping them to various locations, or by using **Copy** or **Cut** and then **Paste**. To remove an item, select it and then click **Delete**. Any child items of the item you deleted will also be deleted.

The task pane editor is not a full WYSIWYG editor. After creating a task pane, you should make sure to open and review the task pane in the Axiom Assistant area to ensure that it displays as you intended.

**TIP:** If you need to edit an existing task pane, you can first open the task pane in the Axiom Assistant area and then open the task pane file for editing. As you make changes in the editor, you can click **Apply** to see the change reflected in the currently open task pane.

## Managing task panes

Task panes can be created, edited, or deleted using **Manage > Task Panes**, in the **Administration** group of the **Axiom** tab. You can also manage task panes from the Task Panes Library in the Explorer task pane.

### ► Creating a task pane

You can create task panes for various purposes and display them to users within the Axiom Assistant area. Once a task pane is created, it can be assigned to users and roles to open automatically when the user logs into the system, or to be available to open on demand.

Task panes consist of one or more section headers and child items within the section. The section headers display as gray bars that can be used to expand or collapse the section. Child items can be used to display instructional text or to link to files and features.

**NOTE:** Only administrators and users with the **Administer Task Panes** security permission can create new task panes.

#### To create a new task pane:

1. On the **Axiom** tab, in the **Administration** group, click **Manage > Task Panes**.

The **Axiom Explorer** dialog opens, with the focus on the Task Panes Library. You can also access this library using the Explorer task pane.

**NOTE:** In systems with installed products, this feature may be accessible from the **Admin** tab. Click **System Browser** to open Axiom Explorer, then navigate to the Task Panes Library.

**TIP:** If you already have a custom task pane open in the Axiom Assistant area, you can right-click the tab of the task pane and select **Create New Task Pane**.

2. Right-click the **Task Panes Library**, and then select **New > Task Pane**.

The **Edit Task Pane** dialog opens.

3. New task pane files start with a single section header, named Section1. Edit the name of this section using the **Section name** box in the right-hand side of the dialog.

You can configure other appearance details for this section, such as to define an optional tool tip, or to enable auto-numbering or image display for this section's child items. For more details on the available options, see [Task pane properties](#).

4. Add child items to the section as needed. You can add child items by doing any of the following:

- With the section name selected, click **Add New Item > Child of selected item**.
- With a child item selected, click **Add New Item** and then either **Before selected item** or **After selected item**.
- Drag and drop an item from the Axiom Explorer pane in the left-hand side of the screen to the desired place in the task pane structure. A black line shows you where the item will be placed.

You can configure each item as desired. An item can be just display text for instructional purposes, or you can link the item to an Axiom file or feature. If you dragged and dropped an item from the Axiom Explorer pane into the task pane structure, then the item is automatically linked to that file or feature. Otherwise, use the **Shortcut Target** setting to assign the item to a file or feature.

For more information on the types of files and features that can be included on task panes and how they work, see [Linking to Axiom files and features in a task pane or ribbon tab](#). For more details on available appearance properties, see [Task pane properties](#).

**NOTE:** If an item has child items, then it cannot also have a shortcut target. When users interact with the task pane, double-clicking an item with children expands and collapses the item, so there is no way for the user to launch the shortcut target in this case.

There are a variety of ways to configure task panes. For more details on some common design goals and avoiding potential issues, see [Task pane design considerations](#).

5. Add more sections and child items as needed. You can add new sections by using **Add New Item > New top level section**. Arrange these items as desired by dragging or dropping items within the structure, or by using the **Edit** button to cut, copy, and paste.
6. Click **OK** to save.

The **Save As** dialog opens to the Task Panes Library. Give the file a name and optionally a description, and save it to the desired location.

**NOTE:** The name of the task pane file determines the default name of the task pane tab within the Axiom Assistant area. For example if the file is named Reports, then when it is opened as a task pane it will have a tab name of Reports. Make sure the file name is brief and intuitive.

After you have created a new task pane, you should open it to make sure all items display and behave as expected. If the task pane will be assigned to end users, it is a good idea to log in as a representative end user and test it.

## ► Editing a task pane

You can edit a task pane at any time, regardless of whether it is currently open in the Axiom Assistant area. Task panes within the Axiom Assistant area are always open read-only and do not impact editing availability. (If a message tells you that a task pane file is locked, this means that another user has opened the task pane in the editor, not that the task pane is open in the Axiom Assistant area.)

If you are editing a task pane, the changes will be visible in your session right away, but other users will not see the changes until the next time the task pane is opened. This means that if a task pane is configured to open on startup, users will not see the changes until the next time they launch the system.

You must have read/write access to the task pane in order to edit it.

### To edit a task pane:

1. Do one of the following to open the task pane for editing:

- If the task pane is already open in the Axiom Assistant area, right-click the tab and then select **Edit Task Pane**.

**TIP:** One advantage of having the task pane open while editing is that you can click **Apply** to immediately see the results of your edits, without needing to close the editing dialog.

- From the **Axiom** tab, in the **Administration** group, click **Manage > Task Panes**. In the **Task Panes Library**, navigate to the task pane that you want to edit, then right-click it and select **Edit**. You can also perform this action from the Explorer task pane.

**NOTE:** If you are using an Axiom packaged product, you can access this feature from the **Admin** tab. Click **System Browser** to open Axiom Explorer, then navigate to the Task Panes Library.

2. In the **Edit Task Panes** dialog, edit the task pane as desired. For more information on the available task pane properties, see [Task pane properties](#).
3. Click **Apply** or **OK** to save the task pane. If you would rather save this task pane as a new file, you can click **File > Save As** from the dialog toolbar.

## ► Deleting a task pane

You can delete a task pane at any time. However, if the task pane is currently open in the Axiom Assistant area within *your* session, you must first close it before the file can be deleted. It does not matter if the task pane is opened in other users' sessions—this does not prevent deletion.

If the task pane is a startup task pane that is configured to be non-closeable, then you must first remove or modify the startup configuration so that you will be able to close it. After you have modified the applicable startup configuration in Security, exit the system and then log in again to apply the new startup configuration.

If any other users currently have the task pane open when you delete the file, the task pane will remain useable in that session until the user closes the task pane or exits the system. If the deleted task pane was configured to open on startup, no special steps are required to remove it from user configurations—the next time users log in, the task pane will simply no longer exist and therefore will be ignored by the startup configuration. However, it is a good idea to remove the obsolete configuration from Security so that user configurations match what you expect to be displayed.

You must have read/write access to the folder in order to delete a task pane in that folder.

#### To delete a task pane:

1. From the **Axiom** tab, in the **Administration** group, click **Manage > Task Panes**. You can also delete task panes using the Explorer task pane.

**NOTE:** If you are using an Axiom packaged product, you can access this feature from the **Admin** tab. Click **System Browser** to open Axiom Explorer, then navigate to the Task Panes Library.

2. In the **Task Panes Library**, navigate to the task pane that you want to delete, then right-click and select **Delete**.

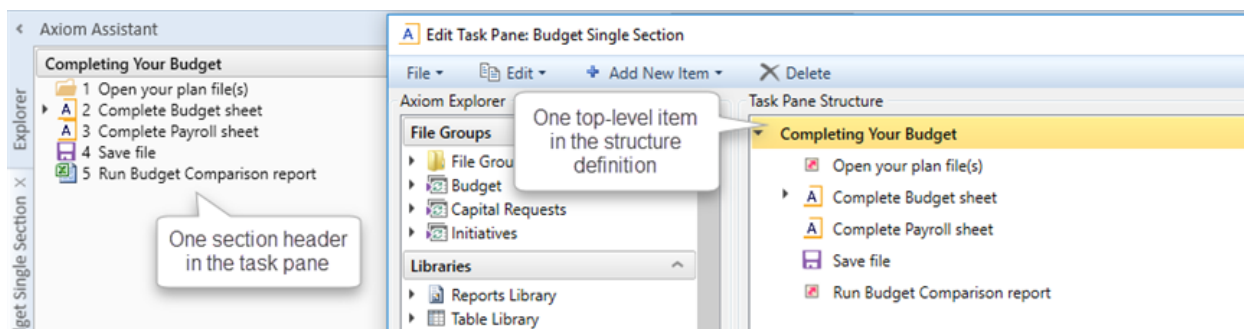
## Task pane design considerations

Keep in mind the following design considerations when creating task panes.

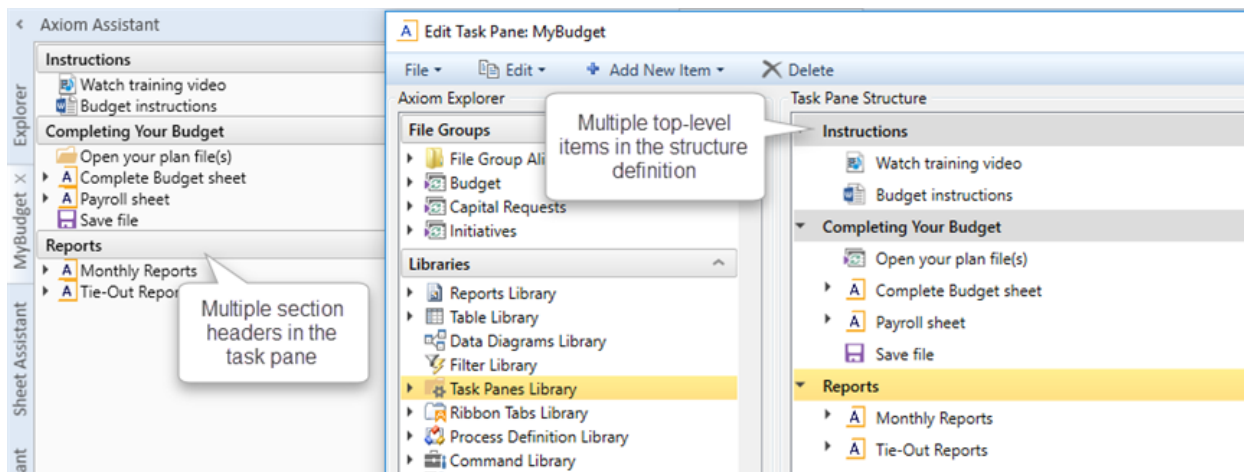
### ► Creating task panes with multiple sections

All top-level items in a task pane are automatically section headers. These items display using a gray header bar, and can be expanded and collapsed (by default, they display expanded).

If the task pane only needs one section, then the task pane should be created so that all items are children of a single top-level item. The following screenshot shows an open task pane with one header side-by-side with the associated view in the editor.



If the task pane needs multiple sections, then you can add multiple top-level items, and then add child items to each section as needed. The following screenshot shows an open task pane with multiple headers side-by-side with the associated view in the editor.

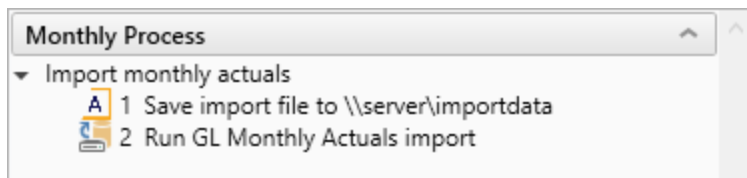


#### ► Shortcuts on items with children

Shortcuts cannot be defined on items in a task pane that have child items. When an item has child items, double-clicking the parent item expands or collapses the item—therefore, there is no way to launch the associated shortcut for that item.

The task pane editor does not prevent saving a task pane with this configuration, however, it does display a validation message informing you that an item cannot have both a shortcut and child items.

If you want to link to a file or feature and include associated instructional text, the shortcut should be defined in the child items, not on the parent item. For example:



In this example, the parent item serves as a statement of what to do, followed by instructional text and then the link to the import.

#### ► Forcing display of an item

By default, if an item in a task pane links to a file or feature, and the user viewing the task pane does not have access to that file or feature, then the item does not display in the task pane for that user. This allows you to create task panes that are dynamic by user—you can include a full set of items in the task pane and users will only see the items that apply to them.

Items in a task pane are also hidden if they do not apply to the current context. For example, an item that links to the **Add Rows** command is hidden by default if the current file is a report, because that command cannot be used in reports.

However in some cases you may want all items in a task pane to display, regardless of whether a user has rights to the items, and regardless of whether the item applies to the current context. For example, you may be creating a task pane that documents a particular process, and all of the process steps are numbered. If a user does not have rights to the file linked in step 5, then step 5 will be omitted from the task pane. Although the auto-numbering will be adjusted for the omitted item, you may prefer to include the item in the task pane anyway for one or more of the following reasons:

- The omitted step may be required, and the user needs to know that it is there and that they cannot perform it as is. Perhaps the user needs to wait for someone else to perform that step, or maybe the security settings have been made in error and the user should have access to that file.
- The omitted step may be optional, but you still want the user to see its place in the overall process. Users with the appropriate rights can perform the step, and users without rights can simply move on to the next step.

To force an item to display in a task pane regardless of security settings or current context, enable **Show restricted item** in the Display Settings for the item. This must be selected on a per item basis.

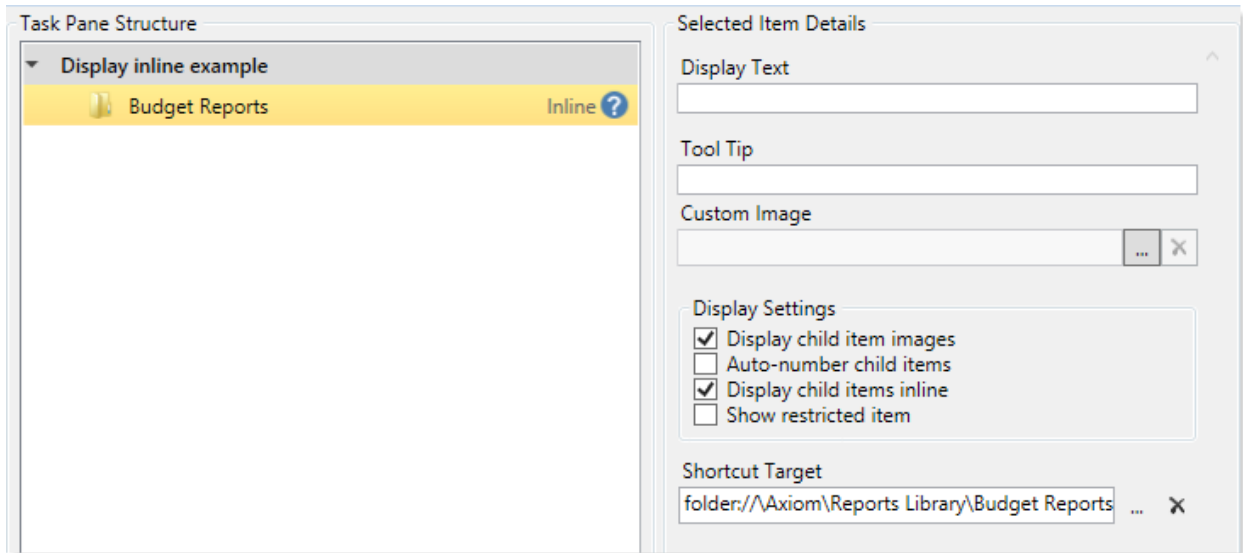
If this option is selected and a user does not have access to the linked item, or the item is not applicable to the current context, then the item is grayed out in the task pane.

### ► Displaying child items inline

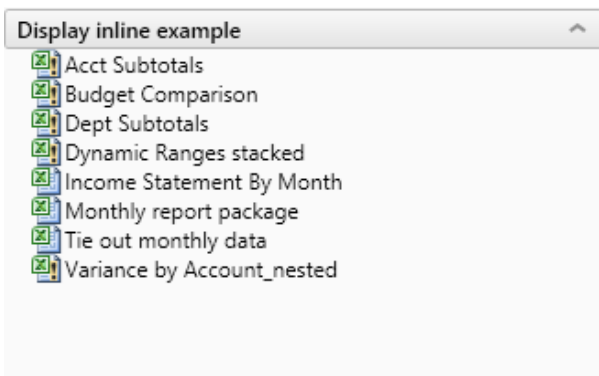
If an item has child items, you can choose to display those items inline (at the level of the parent item), omitting the display of the parent item. To do this, you must enable **Display child items inline** for the parent item.

This behavior applies even when the child items are not defined in the task pane structure, but are dynamically generated as part of the parent item. For example, if you link a task pane item to a report folder, the folder is the parent and the files in the folder are the child items, even though the child items aren't technically defined in the task pane structure.

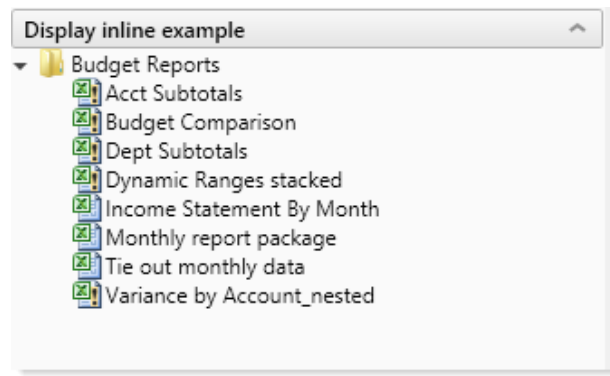
In this example task pane structure, the task pane item links to a report folder, and the item is configured to display child items inline:



The following screenshots show the difference in how this item displays, depending on whether **Display child items inline** is enabled.



*Display child items inline: Enabled*

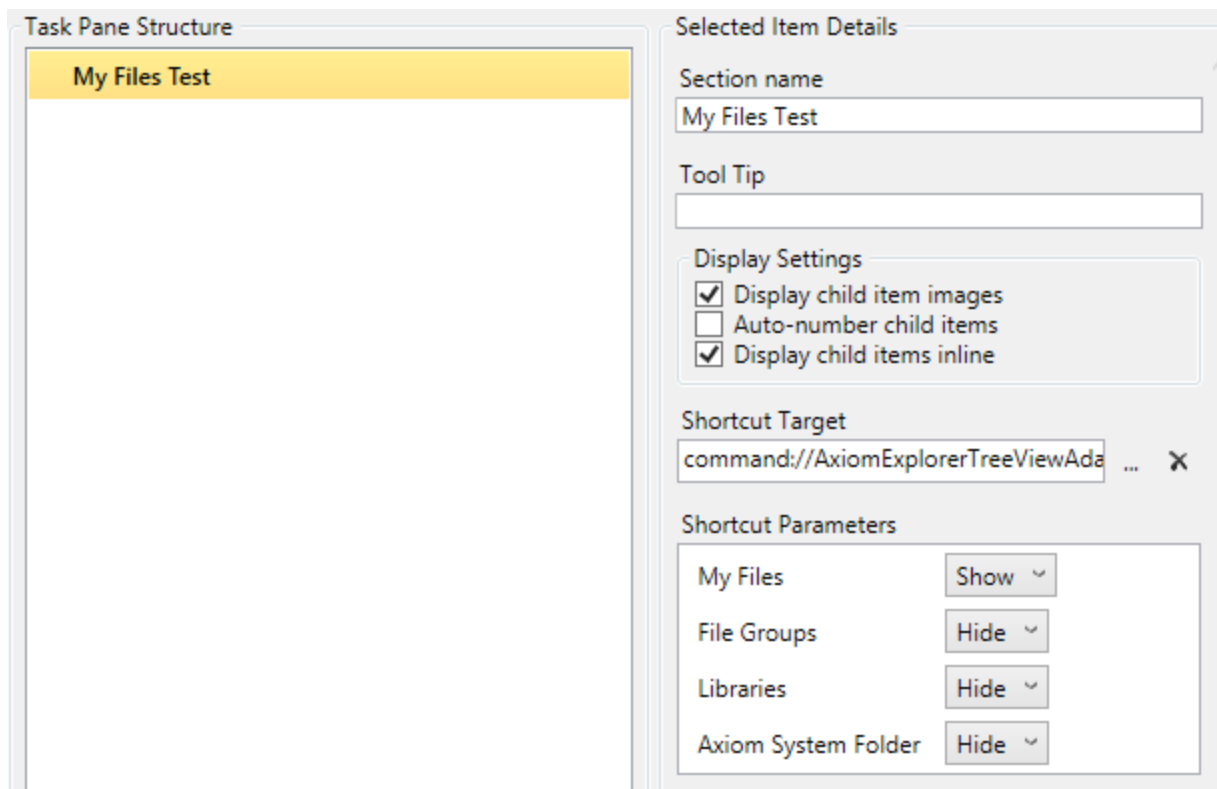


*Display child items inline: Disabled*

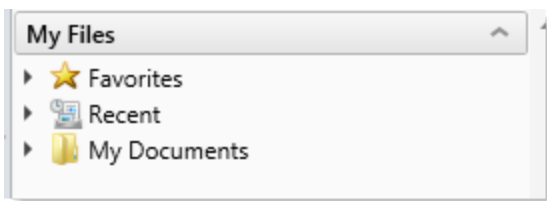
In the first example, the parent item does not display, and instead the child items display at the same level of the parent item. In the second example, the child items display as normal under the parent item.

This setting is also useful when including pre-built feature controls in a custom task pane, such as the Axiom Explorer Tree View. If you link a task pane item to the control, then by default the control will display as a child item underneath the parent item. If instead you want the item to display directly within the task pane, omitting the parent item, then select **Display child items inline**.

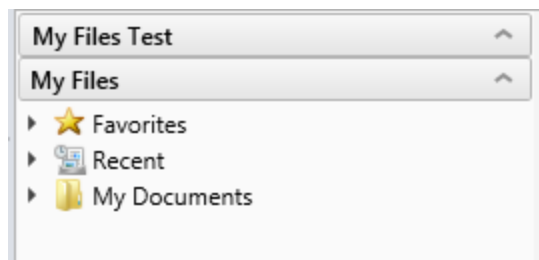
For example, the following task pane item is linked to the Axiom Explorer Tree View control, configured to show only the My Files section and configured to display child items inline.



The following screenshots show the difference in how this item displays, depending on whether **Display child items inline** is enabled.



*Display child items inline: Enabled*



*Display child items inline: Disabled*

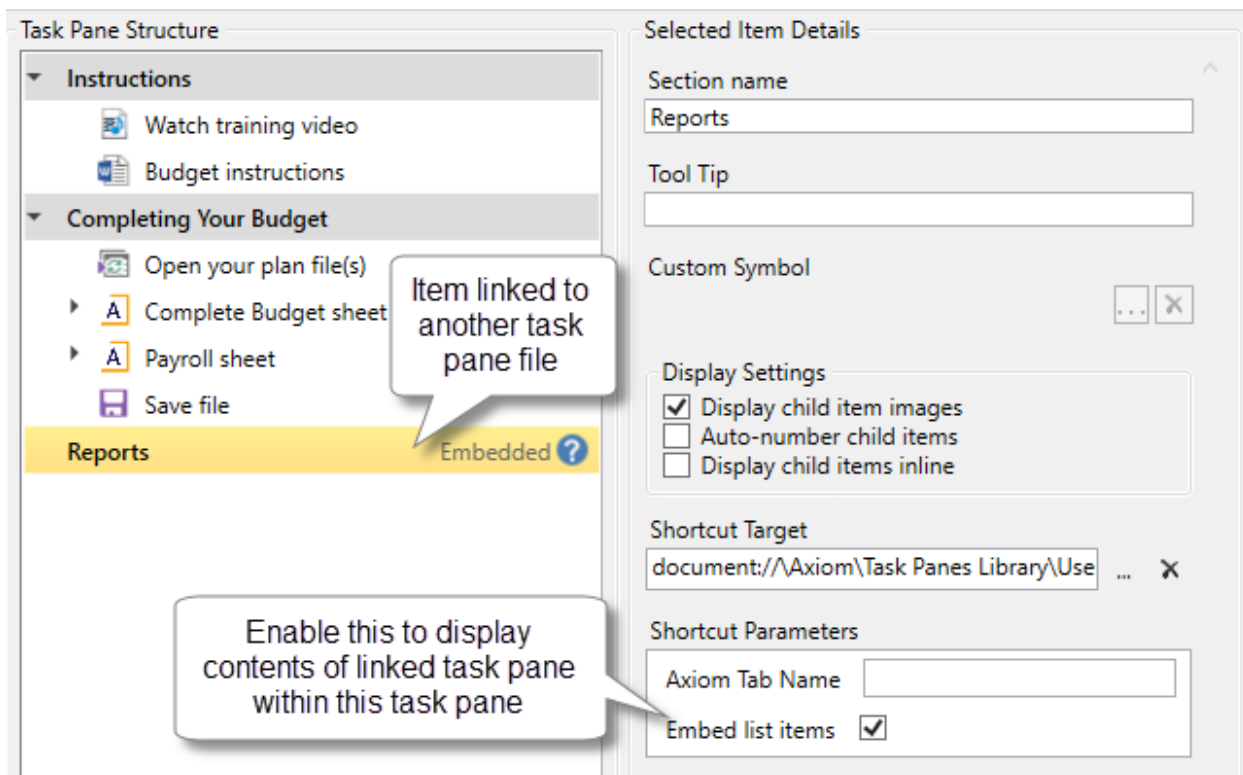
In the first example, the My Files control is displayed directly within the task pane, omitting the parent item. This is most often the preferred way to display a pre-built feature control. In the second example, the My Files control is displayed underneath the parent item, which results in a duplicate header.

### ► Embedding a task pane within another task pane

It is possible to create "nested" task panes, where the content from one task pane displays within another task pane. This is accomplished by using the shortcut property **Embed list items** when linking to the task pane, and then optionally also enabling **Display child items inline** for the linked item.

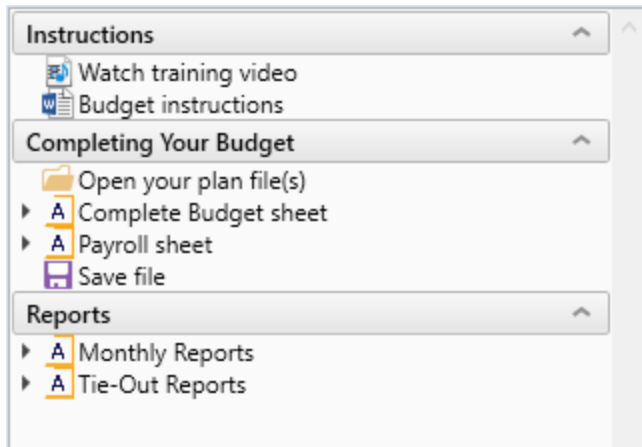
**NOTE:** If **Embed list items** is enabled, then the contents of the embedded task pane are treated as if they are part of the current task pane. Axiom does not make a separate security check to see if the user has permission to access the embedded file—the user's permission to the current file is all that matters. However, security permissions will be applied to the *contents* of the embedded task pane as normal.

For example, imagine that you have a task pane, and you want to create a second task pane that has the same content as the first task pane plus some additional items. If you link to the first task pane from the second task pane, by default the first task pane will display as a file within the second task pane, and users can double-click the file to open the first task pane. But if you instead enable **Embed list items**, then the contents of the first task pane will display embedded within the second task pane.

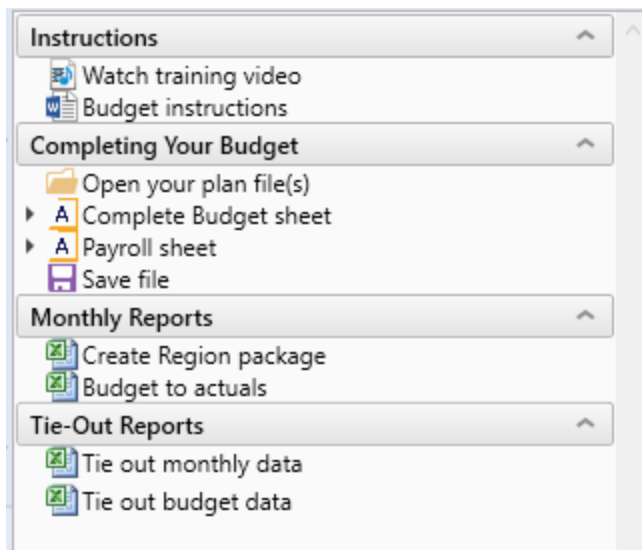


*Definition example for nested task panes*

At this point the items display as a collapsible node, with the name of the first task pane as the "parent" item and the contents of the first task pane as child items.



If instead you want the contents of the first task pane to display inline within the second task pane (as if they were defined directly within the second task pane), then you must also enable **Display child items inline** for the linked item in the second task pane.



**NOTE:** If you embed a task pane in another task pane, and you plan to assign the "parent" task pane to users as a startup file, keep in mind that users must have explicit permission to the embedded task pane in order for it to display in the startup task pane. The implicit permission that results from startup file assignment only applies to the parent task pane.

## Task pane properties

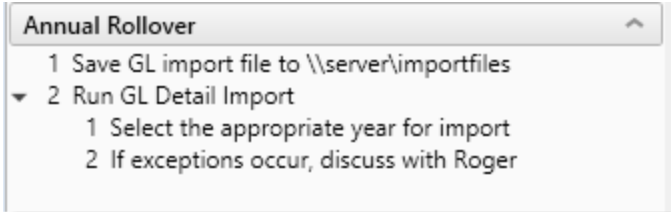
The following properties are available for items in a task pane. If you are editing one of the built-in task panes (such as Explorer), see the following for more information on that task pane: [Built-in task panes and ribbon tabs](#).

Item	Description
Display Text / Section Name	<p>The text to display for the item. If the item has a defined shortcut target to an Axiom file or feature, then you can leave this box blank, and the display text will be the name of the file or feature.</p> <p>If the item is a top-level item, then this property is called Section Name, to indicate that the item will be displayed as a section header in the task pane. Section headers are gray title bars that can be expanded and collapsed.</p>
Tool Tip	<p>The text to display as a tool tip when a user hovers their cursor over the item. This text can be helpful to explain the purpose of the item within the context of the list.</p> <p>If no tool tip text is defined, then the tooltip displays the full path of the shortcut target (if defined).</p>
Custom Image	<p>The image to display for the item on the task pane. Click the <b>Browse</b> button [...] to select an image that is stored in the Reports Library. If the image is not already saved in the Reports Library, you can right-click a folder and select <b>Import</b> to import the image (if you have the appropriate rights to do so).</p> <p>The image must be at least 32x32 pixels, and the file format must be JPG or PNG. Larger images will be resized to fit. The image should be square because the aspect ratio will be retained when resizing.</p> <p>If no custom image is defined, then the default Axiom image for the shortcut target is used. If the item has no shortcut target, the Axiom "dots" icon is used. In either case (custom image or default image), an image will only display next to an item if the parent item has <b>Display child images</b> enabled.</p> <p><b>NOTE:</b> End users must have permission to the image file in order to see it rendered in the task pane. It is recommended to create a dedicated Images folder in the Reports Library and store all images in this location. You can grant access to this folder using the Everyone role, or you can create subfolders and grant access to users and roles as needed.</p> <p>This option is not available for top-level section items.</p>

Item	Description
Usage Key	<p>A text string key to dynamically control whether this item is visible in the task pane when it is opened. If defined, then this item will only be visible in the task pane if the task pane is opened as an associated task pane, and if the key is appended to the document path using the following syntax:</p> <pre>?TaskPaneUsage=UsageKey1, UsageKey2</pre> <p>This property is only available to task panes that are stored in file group Utilities folders, and can only be configured by product developers. The property is only visible in client systems as read-only, and only if the task pane is part of a product-installed solution with a configured usage key.</p> <p>This feature is intended to be used when plan files have an associated task pane, but some items in the task pane need to dynamically show and hide depending on the individual plan file. For example, some items in the task pane may only apply to certain department types or certain types of capital requests. To accommodate this, a formula can be used to dynamically change the usage keys appended to the document path for the associated task pane.</p> <p>If an item in the task pane has a defined usage key, and that key is not appended to the document path, then the item is hidden in the task pane. Items without a usage key always display.</p>

#### Display Settings


Item	Description
Display child item images	<p>Select this option if you want icons to display on the child items for the current item. This option is selected at the parent item level because all child items must have the same icon settings (enabled or disabled), so that the child items will align appropriately in the task pane.</p> <p>If enabled, then each child item will display using the associated icon for its shortcut target. For example, if the target is a report file, then the relevant report file icon will display next to the item. If an item does not have a shortcut target, or if the target does not have a specific icon, then the default Axiom "dots" icon is used.</p> <p>If disabled, then no icons will display on child items.</p>

Item	Description
Auto-number child items	<p>Select this option if you want to apply auto-numbering to child items for the current item. If selected, all child items will be auto-numbered by whole numbers (1, 2, 3...).</p> <p><b>NOTE:</b> Multi-level auto-numbering is not supported. If auto-numbering is applied at two subsequent levels, the numbering will appear as follows:</p> 
Display child items inline	<p>Select this option if you want all of this item's child items to display inline, omitting this item.</p> <p>For example, this might be used in the following circumstances:</p> <ul style="list-style-type: none"> <li>• When using certain items from the Command Library as targets, to hide the "command line" and only show the contents of the command.</li> <li>• When linking to a folder, to hide the "folder" node and instead display the resulting files inline.</li> <li>• When linking to a task pane, to hide the file name and instead show the contents of the linked task pane directly within this task pane. The shortcut parameters for the linked task pane must also be configured to enable <b>Embed list items</b>.</li> </ul> <p><b>NOTE:</b> If this option is selected for an item that does not have any child items (either literal child items in the structure or child items inherent to the shortcut target), then the item will be hidden in the task pane.</p>

Item	Description
Show restricted item	<p>Select this option if you want this item to always display in the task pane, regardless of the user's security permissions and regardless of the current context.</p> <p>By default if a task pane item is linked to a file or feature that a user does not have access to, then that item is hidden from the user. There are times when that may not be the desired behavior. For example, if the task pane details a set of process steps, you may want the user to be able to see the entire process from start to finish, even if they do not have rights to one or more particular items referenced in the process. For more information, see <a href="#">Task pane design considerations</a>.</p> <p>If this option is selected, and the user does not have rights to the linked file or feature (or the item is not applicable to the current context), then the item will display as grayed out and the file or feature cannot be launched.</p> <p>This option only applies to child items; it does not apply to top-level sections. By default, if a user has no access to any items in a section, the entire section will not display.</p>

**TIP:** As you change appearance options, you can click **Apply** to view the result of the change within the Axiom Assistant area, without needing to close the **Edit Task Pane** dialog. This only works if the task pane was opened before editing.

## Shortcut settings

Item	Description
Shortcut Target	<p>The target file or feature for the item. When a user double-clicks on the item in the task pane, the file or feature will open.</p> <p>Click the <b>Browse</b> button [...] to select the desired file or feature. You can select any item that you can navigate to within Axiom Explorer. For more information on what types of files and features can be linked to task pane items and their behavior within the task pane, see <a href="#">Linking to Axiom files and features in a task pane or ribbon tab</a>.</p> <p>Once a target is selected, Axiom places the necessary syntax to open the target within the <b>Shortcut Target</b> box. It is best not to manually edit this text, as you may inadvertently render the syntax invalid. If you want to select a different target, use the Browse button to select the target rather than editing the target syntax.</p> <p>If you no longer want the item to link to a shortcut target, click the <b>Delete</b> button  to remove the shortcut.</p> <p><b>NOTE:</b> If an item has child items, then that item cannot have a shortcut target. When users work with the task pane, double-clicking an item with children expands or collapses the item, so there is no way for the user to launch the shortcut target.</p>
Shortcut Parameters	<p>Most shortcut targets have one or more associated shortcut parameters that impact the behavior of the linked file or feature when it is opened from the task pane. The available parameters depend on the shortcut target—for example, report files have different parameters than tables.</p> <p>For more information on available shortcut parameters per shortcut target type, see:</p> <ul style="list-style-type: none"><li>• Shortcuts</li></ul> <p>You can link to various files and other items in Axiom using shortcuts. For more information, see Axiom Help: <b>Reference &gt; Shortcuts</b> (or search on code <b>AX1169</b> to bring up the Shortcuts section).</p> <ul style="list-style-type: none"><li>• Command Library</li></ul> <p>You can link to various Axiom features using commands in the Command Library. For more information, see Axiom Help: <b>Reference &gt; Command Library</b> (or search on code <b>AX2685</b> to bring up the Command Library section).</p>

### Task pane editor settings

The option **Limit to Web Client Navigation Items** is located underneath the Axiom Explorer section of the dialog. This option should only be used when you are creating a task pane that defines navigation links for the Web Client. If enabled, it filters the dialog so that it only displays options that are relevant to Web Client navigation links.

## Assigning task panes to users

You can assign task panes to users and roles using the Startup tab in Axiom Security. When a user starts Axiom, their assigned startup task panes will automatically open.

Alternatively, you can also grant permission to access one or more task panes in the Task Pane Library directly, at the user or role level. This allows users to open task panes on demand.

### ► Assigning as startup files

To configure a task pane to open on system startup for a particular user or role, use the **Startup** tab of Security. Any task panes listed on the Startup tab will open automatically when the user starts the Excel Client or the Windows Client. Task panes do not apply to the Web Client. For more information on assigning startup task panes, see the *Security Guide*.

When task panes are assigned as startup files, users do *not* otherwise need to be granted access to these files. The files will open automatically at startup.

When assigning the startup file, you may want to use the Shortcut Parameters to designate the task pane as non-closeable. This ensures that the task pane will always be available to the user. This option is provided so that users do not accidentally close the task pane and then have no way to reopen it (because they do not otherwise have permissions to the file).

In most cases, you will configure startup task panes on a per role basis. For example, you might have a Budget User role, and you want all users in this role to see a simple task pane tab that presents the handful of items that they need to access. Alternatively, if all users in a system need to see a particular task pane on startup, you can configure it for the Everyone role.

Startup task panes display in the Axiom Assistant area when opened, in the following order:

1. Task panes assigned to the Everyone role.
2. Task panes assigned to other roles that the user belongs to (multiple roles are sorted in alphabetical order).
3. Task panes assigned to the user.

Keep in mind that the visibility of a startup task pane may depend on whether the task pane has any content to display. For example, the built-in Process task pane is assigned to the Everyone role by default and therefore it opens at startup for all users, but if a user does not have any process tasks then the task pane does not display for that user.

## ► Access to the Task Panes Library

If desired, you can grant users read-only access to files in the Task Panes Library, using the **Files** tab of Security. This allows users to access the library from the Explorer task pane, and then open task panes on demand. You can also link to task panes from within a task pane or a ribbon tab, and in this case the user must have read-only access to the task pane in order to open it using the link.

You might do this if you have some task panes that users only need to access occasionally, when performing certain tasks. In this case it may not make sense to open these task panes at startup. When users want to open one of these task panes, they can double-click on it in the Task Pane Library, and it will open as a task pane in the Axiom Assistant area. They can then close the task pane when they are finished with it, by clicking on the **X** button on the task pane tab.

In most cases, end users do not need to edit task panes and therefore do not need read/write access to these files. However, if you have non-administrator users who need to create and edit task panes, those users must be granted the **Administer Task Panes** permission as well as read/write access at a file or folder level in the Task Panes Library.

## Associating a task pane with a particular file

You can associate a task pane with a particular file, so that the task pane automatically opens when that file is opened, and remains available for use while the file remains open.

For example, you might want to allow users to change refresh options for a report within a task pane instead of using a refresh dialog. Or you might design a task pane to assist users in completing their plan files, and you want that task pane to be automatically available when users are working in a plan file.

The associated task pane can be a custom task pane in the Task Panes Library, or it can be an Axiom form that has been designed for use as a task pane. For more information about designing an Axiom form for use as a task pane, see the *Axiom Forms and Dashboards Guide*.

## ► Specifying the associated task pane for a file

To associate a task pane with a file, use the **Associated Task Pane** setting within the file. This setting is located on the Control Sheet, in the **Workbook Options** section:

17	<b>Workbook Options</b>	
18	Workbook Protection On/Off	Off
19	Workbook Protection On/Off during snapshot	Off
20	Downgrade to read-only on open	Off
21	Process alerts on save data	
22	Process alerts on save document	
23	Associated Task Pane	document://Axiom\Reports Library\FORMS\refresh task pane.xlsx?AxiomTabName=Refresh

Specify the full path and file name to one of the following:

- A custom task pane file in the Task Panes Library (AXL file)
- A form-enabled file, where the form has been designed for use as a task pane

For example:

```
\Axiom\Task Panes Library\MyTaskPane.axl
```

```
\Axiom\Reports Library\Forms\MyTaskPane.xlsx
```

To easily obtain the full path for a file, navigate to that file in the Explorer task pane, then right-click and select **Copy document path to clipboard**. You can then paste the value into the cell.

Alternatively, you can use document shortcut syntax to specify the task pane file. When using a document shortcut, you can add a parameter to specify an alternate tab name for the task pane. If specified, this tab name will be used instead of the file name. For example:

```
document://\Axiom\Task Panes Library\MyTaskPane.axl?AxiomTabName=MyTab
```

To create the document shortcut syntax, take the normal file path and then add the text `document://` to the front of it. To use the optional tab name parameter, append the text `?AxiomTabName=Name` to the end of the shortcut.

The next time you open the document after saving, the entry will be automatically converted into a system-managed document shortcut (you can tell the difference by the presence of a `_tid` parameter on the end of the shortcut). If you need to change the entry to point to a different document, or to change the tab name, simply enter the path or document shortcut as you would have originally, and it will be converted again when you save the file.

**NOTE:** The user must have at least read-only permission to the associated task pane file in order to open it. If the user does not have access to the file then the task pane will not open and no error will display. If desired, when configuring security access to the task pane you can clear the **Show in Explorer** option so that the task pane does not display in the Explorer task pane or other "Explorer views."

If the Axiom file is form-enabled, then the associated task pane does not apply when the file is open as an Axiom form, with one exception: if the associated task pane is being used to define navigation links for the form, those links will display in the Navigation panel of the Web Client container.

## ► Task pane behavior

When a task pane is associated with an Axiom spreadsheet file, the following behavior occurs:

- The task pane is opened automatically when a user opens the file, and the task pane is made active—meaning the task pane is selected and visible in the Axiom Assistant area. The tab name of the task pane is the file name, unless an alternate tab name has been specified using document reference syntax (see the previous section).
- The task pane is non-closeable. As long as the file is open, the task pane will remain open. The task pane will automatically close when the file is closed.
- The task pane is linked to the file. If the user moves to a different file, the task pane will hide, and if the user moves back to the file the task pane will become visible again.

The same task pane can be associated with multiple files. If a user has multiple files open with the same associated task pane, the behavior depends on whether the task pane is a custom task pane or an Axiom form.

- **Axiom form:** Each file has its own separate instance of the task pane (though only a single instance displays at any one time, depending on which file is the currently active file). Each instance maintains its own state for the active document.
- **Custom task pane:** One instance of the task pane is opened. This single instance remains linked to all associated files, but does not maintain a separate state for each file.

## ► Usage key

The **Usage Key** property for task pane items can be used to dynamically show or hide certain items when the task pane is opened. This feature is intended to be used when plan files have an associated task pane, and some items in the task pane need to show or hide depending on a condition. For example, some task pane items may only apply to certain department types, or to certain types of capital requests.

The usage key is only available in task panes that belong to file groups, and it can only be configured by product developers. The usage key is only visible as read-only in client systems if it has been configured on a product-delivered asset; otherwise the property does not display.

In product-delivered assets, the usage key can be used as follows:

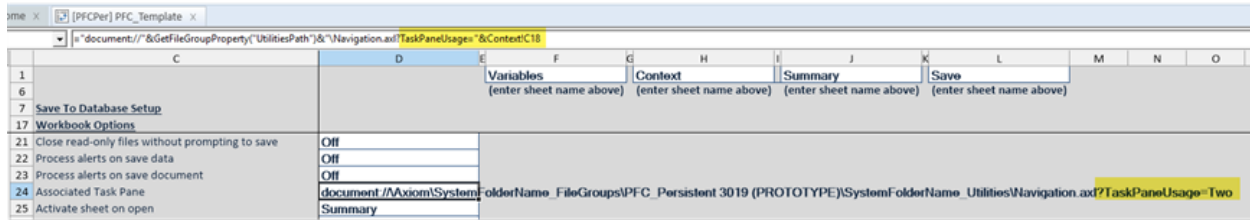
- Within the task pane properties, define a usage key on items that need to dynamically show and hide. If the item should always display, leave the usage key blank.
- In the **Associated Task Pane** field on the Control Sheet of the plan file template, enter the document path to the task pane and append one or more usage keys to the path. To do this, add the following syntax to the end of the path:

`?TaskPaneUsage=UsageKey1, UsageKey2`

You can list as many keys as needed, separated by commas. In order for the keys to change based on some condition in the plan file, you will need to query in the condition on open and use a formula to construct the document path with the keys.

- When the associated task pane is opened, it shows all task pane items that match the listed usage keys or have no key. If an item has a key that was not listed in the associated task pane path, that item is hidden.

For example, the following screenshot shows an associated task pane path with the "Two" usage key appended to the end. The path uses a formula to dynamically determine the usage keys that apply to each plan file.



## Hiding items in a task pane

You can optionally hide items in a custom task pane instead of deleting them. For example, you may have an item in a task pane that is only relevant during a certain point of the planning cycle. You can toggle the item hidden when it is not needed, then toggle it visible again when it needs to be used.

You must have read-write access to the task pane in order to configure the visibility of items in the task pane.

**NOTE:** Some commands are only visible in a task pane when the currently active document supports those commands. Make sure that the currently active document is relevant to the commands that you want to configure, before opening the Configure Visibility dialog.

### To configure the visibility of items in a task pane:

1. On the **Axiom** tab, in the **Administration** group, click **Manage > Task Panes**.

The **Axiom Explorer** dialog opens, with the focus on the Task Panes Library. You can also access this library using the Explorer task pane.

**NOTE:** If you are using an Axiom packaged product, you can access this feature from the **Admin** tab. Click **System Browser** to open Axiom Explorer, then navigate to the Task Panes Library. The product may also provide this functionality within a product task pane.

2. In the Task Panes Library, right-click the task pane that you want to modify, and then select **Configure Visibility**.

**TIP:** If the task pane is already open in the Axiom Assistant area, you can access this feature by right-clicking the side tab for the task pane.

3. In the **Configure Item Visibility** dialog, clear the check box for any item that you want to hide, and/or select the check box for any item that you want to show.

If you clear the check box for a parent item, this hides the parent item and all child items, but it does not clear the check boxes for the child items. Instead, the child items show as grayed out to indicate that they will not display.

If an item is hidden using this dialog, it is hidden for all users. The only way to show it again is to configure the item as visible using this dialog. If an item is visible, the normal visibility behavior for task pane items applies. Depending on the user's security permissions and on the task pane configuration, a visible item may be visible and enabled, visible and disabled, or not visible.

If a task pane shows items that are dynamically generated—such as when a task pane shows the contents of a folder—these dynamic items can still be configured, but special considerations apply. See [Configuring visibility for dynamic items](#).

4. Click **OK** to save your changes.

If the task pane is already open in the current session, it will update to reflect the changes made in the Configure Visibility dialog. However, in some cases it may be necessary to close and reopen the task pane in order to see the correct visibility settings.

### ► Configuring visibility for dynamic items

Certain shortcut targets cause a list of items to be dynamically generated in the task pane. For example, if the shortcut target is a folder, the files in that folder display within the task pane. When you use the Configure Visibility feature, it also displays these dynamic items, and you can hide or show these items on an individual basis.

When using Configure Visibility on dynamically generated items, note the following:

- If new items are added to a parent with dynamic child items—such as if new reports are added to a folder—those items are visible by default if the parent is visible. However, these new items will not cause the parent to become visible if the parent item is configured as hidden.
- The Configure Visibility feature works with most dynamically generated items, however, you may encounter certain rarely used commands or configurations that do not work as expected.

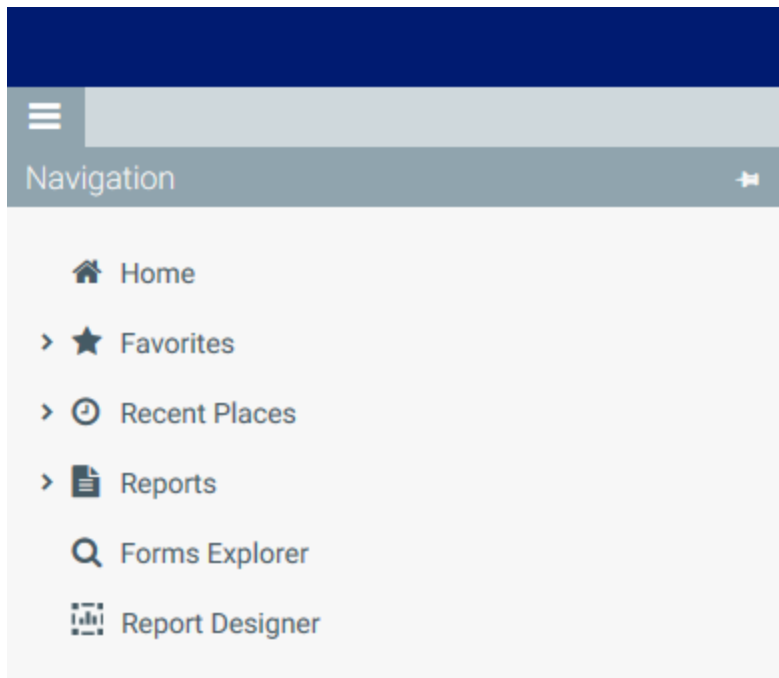
## Defining content for the Web Client Navigation panel

You can define a set of navigation links for the Web Client, to provide users with easy access to their Axiom forms, web reports, and various areas of the Web Client. These links are displayed in the Web Client Navigation panel.

You can define two types of navigation links:

- Global navigation links that display while the user navigates to various documents and areas.
- Form-specific navigation links that only display when that form is open in the Web Client.

In the Web Client, users can click the menu icon in the top left corner of the gray task bar to open the Navigation panel and use the links. The global links display at the top of the panel, followed by any form-specific links.



The Navigation panel honors the user's security permissions, and hides any links that the user does not have access to.

Web navigation links are defined by using task pane files. Within the task pane files, you can set up links to various web-enabled files as well as to certain areas of the Web Client. When the Navigation panel is rendered, the links are read from the designated task pane files and displayed in the panel as hyperlinks.

### ► Defining global navigation links

To define global navigation links, use the reserved task pane file `WebClientNavigationPane.axl`. Only administrators can access and edit this file. This file is located in the Axiom System area of Axiom Explorer:

```
\Axiom\Axiom System\Forms Runtime\WebClientNavigationPane.axl
```

**NOTE:** Do not change the name of this file. The navigation feature looks for this specific file name.

This file serves as a starter template, containing several sample sections and links. You can use the file as is, or modify the file as needed to meet the needs of your installation. For more information on how to define the navigation links within the task pane document, see [Using the task pane editor to define web navigation](#).

The Forms Runtime folder also contains a copy of the platform template used to create this file. The name of the platform template is `Platform.WebClientNavigationPane`. This file is updated every

time you upgrade your Axiom database, so that you always have access to the current platform template. At any time, you can make a copy of this template to "start over" with a new WebClientNavigationPane file.

The starter template contains the following sections and links by default:

- **Home:** Links to current user's home page.
- **Favorites:** Links to current user's web-enabled favorites.
- **Recent Places:** Links to current user's recent files and places visited in the Web Client.
- **Reports:** Links to current user's web-enabled reports (Axiom forms or web reports), grouped by folders in the Reports Library. Only folders with web-enabled reports will display.
- **Forms Explorer:** Links to the Forms Explorer page, where users can browse all Axiom forms available to them.
- **Report Designer:** Links to the Report Designer page, where users can open existing web reports and create new ones.

### ► Defining form-specific navigation links

Form-specific navigation links use the Associated Task Pane feature. To set up form-specific links:

- Create a task pane file in which to define the links. You can name this file anything you like, and save it anywhere in the Task Panes Library. For more information on how to define the navigation links within the task pane file, see [Using the task pane editor to define web navigation](#).
- In the form where you want the links to display, specify the task pane file as the **Associated Task Pane** for the form source file. This setting is located on the default Control Sheet, in the **Workbook Options** section. To specify the associated task pane, enter the full path and file name of the task pane document (AXL file) that contains the links. For example:

```
\Axiom\Task Panes Library\FormLinks.axl
```

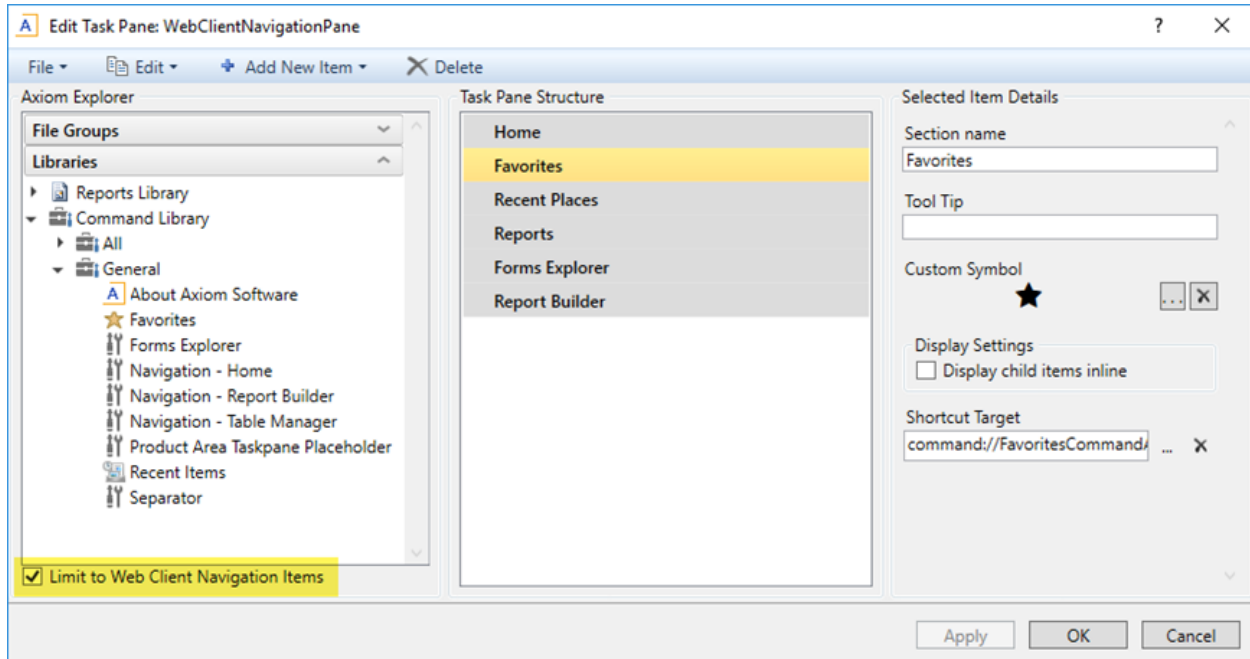
To easily obtain the full path for a file, navigate to that file in the Explorer task pane, then right-click it and select **Copy document path to clipboard**. You can then paste the value into the cell.

When the form is opened in the Web Client, the links will be read from the designated associated task pane, and appended to the Navigation panel (below the global navigation links). If the user navigates to a different form, the form-specific links will be removed from the Navigation panel, and replaced by any form-specific navigation links defined for the new form.

**NOTE:** It is a good idea to start this task pane with an item that uses the **Separator** command, followed by the form-specific links. That way when the task pane contents are displayed in the Navigation panel, there will be a separator line between the global navigation links and the form-specific links.

► Using the task pane editor to define web navigation

Web navigation links are defined using task pane files. When working in a file that is intended to be used for web navigation, make sure to enable the setting **Limit to Web Client Navigation Items**, located at the bottom left of the **Edit Task Pane** dialog.



This setting is enabled by default in the WebClientNavigationPane file; you must enable it manually when creating any form-specific navigation files. When enabled, the task pane editor is limited to only showing items and features that are relevant for use as Web Client navigation items.

The following task pane features are *not* supported for Web Client navigation, and do not display in the task pane editor when **Limit to Web Client Navigation Items** is enabled.

- **Custom Image** (use Custom Symbol instead)
- **Auto-number child items**
- **Show restricted items**

To display icons next to Web Client navigation items, you can use the **Custom Symbol** feature, which is only available when **Limit to Web Client Navigation Items** is enabled. Click the [...] button to the right of the Custom Symbol box to open the **Choose Symbol** dialog, and then select a symbol from the symbol library. These are the same symbols that are available for use in Axiom forms.

The following items can be placed in a task pane used for web navigation:

- **Text-only items.** These items can be used as expandable/collapsible headers for sets of links. You can nest links using any number of header levels.

- **Axiom forms.** Form-enabled files will be opened as forms by default. The available shortcut parameters allow specifying an optional Quick Filter, and whether the file should be opened in the current window or a new window (default is current window).
- **Web reports.** The available shortcut parameters allow specifying whether the report should be opened in the current window or a new window (default is current window).
- **Folders.** The folder structure (including any subfolders) will display in the Navigation panel, automatically showing all web-enabled files that the user has rights to access. Folders without any web-enabled files will not display in the Navigation panel. This provides an easy way to display all relevant contents of a particular folder in the navigation pane.

When files are shown in the navigation pane via a folder listing, it is not possible to define a Quick Filter for any individual file or specify that the files should open in a new window. These options are only available when the files are added to the task pane individually.

Additionally, the following commands from the Command Library can be used as Web Client navigation items:

- **About Axiom Software:** Opens the About box for Axiom.
- **Favorites and Recent Items:** When used in a Web Client Navigation task pane, the lists of favorites and recent items are automatically filtered to only show web-applicable content.
- **Navigation:** Several commands are available to navigate to certain areas of the Web Client, such as the Table Manager or Report Designer.
- **Plan File Directory and Process Directory:** Opens the Plan File Directory web page or the Process Directory web page for a specified file group.
- **Separator:** Use this command to place a separator line between items in the Navigation panel.

#### NOTES:

- You can add shortcuts to top-level items if the item does not have child items, but the task pane editor does not allow dragging and dropping items from the Axiom Explorer pane to the top level. You must use **Add New Item > New top level section** first, then use the **Shortcut Target** property to assign the desired file, folder, or command.
- When the Navigation panel is viewed by a user, if a top-level item has no visible children underneath it (because of items being hidden due to security permissions), then the top-level item will also be hidden.

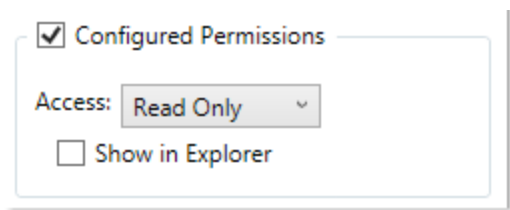
For general information about using the task pane editor, see the *System Administration Guide*.

## ► Security considerations

If a user does not have security access to an item listed in the Navigation panel, that particular link will not display. If all items underneath a text-only header item are hidden due to security reasons, then the header item will be hidden as well.

Users must have security access to any file that defines form-specific navigation links (**Associated Task Pane** files). If a user does not have access to these files, then the links will not display on the navigation panel.

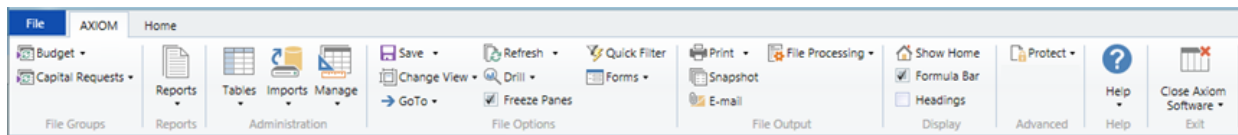
The recommended way to grant this access is to configure the file as **Read Only** and disable **Show in Explorer**. This means that the user will be able to access the file when they open a form that uses it, but otherwise they will not see the file in any file explorer views like the Explorer task pane. The access can be set at the user level or the role level, including on the Everyone role. You may want to store all form-specific navigation task panes in a specific sub-folder and then grant the access at the sub-folder level.




## Ribbon tabs

You can use ribbon tabs to provide users with a custom user interface on the ribbon in the Excel Client or the Windows Client. For an overview of how the Axiom user interface can be customized, see [About custom task panes and ribbon tabs](#).

The *ribbon* is the name of the multi-tabbed toolbar area across the top of the Axiom application. In the Excel Client this area includes the full Excel ribbon. You might also think of this area as the Axiom menu.



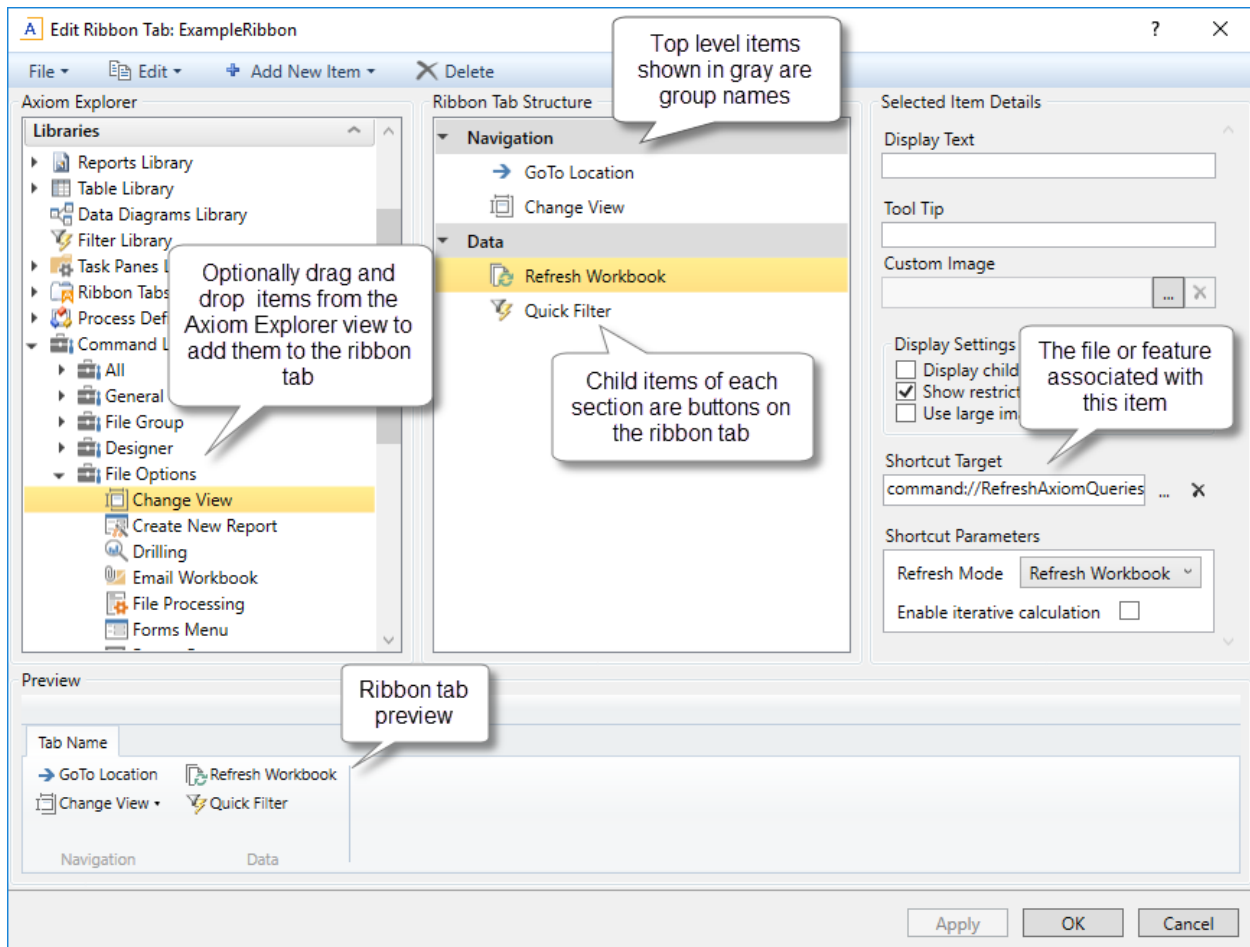
*Example ribbon area in the Windows client*

This section explains how to create, edit, and delete custom ribbon tabs, and then assign them to end users. Ribbon tabs are managed using the Ribbon Tabs Library within Axiom Explorer. Ribbon tab files display using the ribbon icon .

In addition to creating your own custom ribbon tabs, you can customize the built-in ribbon tabs provided by Axiom—the main Axiom ribbon tab and the Axiom Designer ribbon tab. For more information, see [Built-in task panes and ribbon tabs](#).

## Ribbon editor

You can create and edit custom ribbon tabs using the **Edit Ribbon Tab** dialog. This dialog has four sections as shown in the following example screenshot.



*Ribbon editor*

The middle section, labeled **Ribbon Structure**, is where you define the groups and individual items to display on the ribbon. To add new items to this structure, you can either:

- Use the **Add New Item** button in the toolbar to add new items. You can choose to add a new child item to the currently selected item, or add a new item at the same level, or add a new group-level item.
- Use the right-click menu to add new items. This has the same options as the Add New Item button.
- Drag and drop an item from the **Axiom Explorer** pane (the left-hand section of the dialog) to the desired location in the ribbon structure. This will automatically link the item in the ribbon structure to the appropriate feature or file (based on what you dragged and dropped).

When you select an item in the ribbon structure, the properties for that item display in the right-hand section of the dialog, labeled **Selected Item Details**. Here you can define display text and other display properties for each item, and assign the associated feature or file for the item using the **Shortcut Target**.

(When you drag and drop an item from the Axiom Explorer pane to the ribbon structure, the shortcut target is automatically assigned.) For more information on the available properties, see [Ribbon tab properties](#).

You can move items in the ribbon structure by dragging and dropping them to various locations, or by using **Copy** or **Cut** and then **Paste**. To remove an item, select it and then click Delete. Any child items of the item you deleted will also be deleted.

The **Preview** section at the bottom of the dialog displays a preview of how the current ribbon structure will look when it is assigned as a startup file and opened in the ribbon. The preview assumes that all items in the ribbon are available to the user. When the ribbon is actually assigned to a user and opened at startup, the display of each item will be dependent on the current file context and on the user's security permissions. The currently selected item in the ribbon structure is also highlighted in the ribbon, so that you can easily find particular items in the preview.

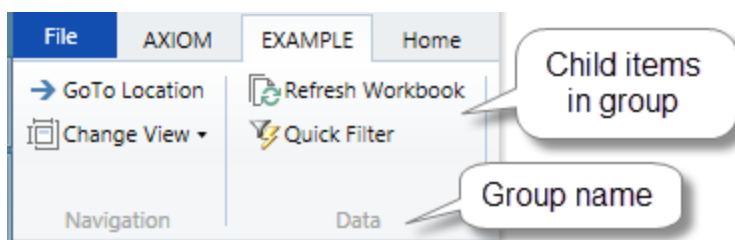
## Managing ribbon tabs

Ribbon tabs can be created, edited, or deleted using **Manage > Ribbon Tabs**, in the **Administration** group of the **Axiom** tab. You can also manage ribbon tabs from the Ribbon Tabs Library in the Explorer task pane.

### ► Creating a ribbon tab

You can create ribbon tabs for various purposes and display them to users in the application ribbon. Once a ribbon tab is created, it can be assigned to users and roles to open automatically when the user logs into the system.

Ribbon tabs are created by defining one or more groups, and placing one or more child items in each group. The top-level group item is text only and cannot link to any file or feature. Child items in the group can link to any eligible file or feature. The following screenshot illustrates how groups and child items display in the ribbon tab:



As you create the ribbon tab in the editor, a preview of the tab displays in the bottom of the dialog. You can use this preview to see what your ribbon tab will look like when displayed in the ribbon.

**NOTE:** Only administrators and users with the **Administer Task Panes** security permission can create new ribbon tabs.

### To create a new ribbon tab:

1. On the **Axiom** tab, in the **Administration** group, click **Manage > Ribbon Tabs**.

The **Axiom Explorer** dialog opens, with the focus on the Ribbon Tabs Library. You can also use the Explorer task pane for this purpose.

2. In the **Libraries** section, right click the **Ribbon Tabs Library**, and then select **New > Ribbon Tab**.

The **Edit Ribbon Tab** dialog opens.

3. New ribbon tab files start with a single group, named Group1. Edit the name of this section using the **Group name** box in the right-hand side of the dialog.

All top-level items in the ribbon tab are groups. In most cases, the only valid property for a group is the group name.

4. Add child items to the group as needed. You can add child items by doing any of the following:

- With the group name selected, click **Add New Item > Child of selected item**.
- With a child item selected, click **Add New Item** and then either **Before selected item** or **After selected item**.
- Drag and drop an item from the Axiom Explorer pane in the left hand side of the screen to the desired place in the ribbon structure. A black line shows you where the item will be placed.

You can configure each item as desired. In most cases, you want each item in the ribbon tab to link to an Axiom file or feature. If you dragged and dropped an item from the Axiom Explorer pane into the ribbon tab, then the item is automatically linked to that file or feature. Otherwise, use the **Shortcut Target** setting to assign the item to a file or feature.

For more information on the types of files and features that can be included in ribbon tabs and how they work, see [Linking to Axiom files and features in a task pane or ribbon tab](#). For more details on available appearance properties, see [Ribbon tab properties](#).

There are a variety of ways to configure ribbon tabs. For more details on some common design goals and avoiding potential issues, see [Ribbon tab design considerations](#).

5. Add additional groups and child items as needed. You can add new groups by using **Add New Item > New top level group**. Arrange these items as desired by dragging or dropping items within the structure, or by using the **Edit** button to cut, copy, and paste.
6. Check the ribbon **Preview** at the bottom of the dialog, to make sure the groups and items display in the ribbon as you expect.
7. Click **OK** to save.

The **Save As** dialog opens to the Ribbon Tabs Library. Give the file a name and optionally a description, and save it to the desired location.

**NOTE:** The name of the file determines the default name of the tab in the ribbon. Make sure the file name is brief and intuitive. When assigning the ribbon tab to users in security, you can override the file name and define an alternate tab name using the **Axiom Tab Name** shortcut parameter.

After you have created a ribbon tab, the only way to test it in the ribbon is to assign it to yourself as a startup file in security, and then close and reopen Axiom. If the ribbon tab is for a particular user or user group, then an administrator should also test the ribbon tab by assigning it to the appropriate user or group and then logging in as a representative user. See [Assigning ribbon tabs to users](#).

### ► Editing a ribbon tab

You can edit a ribbon tab at any time, regardless of whether it is currently open in the ribbon. Ribbon tabs currently open in the ribbon do not impact editing availability. If a message tells you that a ribbon tab file is locked, this means that another user has opened the ribbon tab in the editor, not that the ribbon tab is open in the ribbon.

Ribbon tabs are only loaded at startup. If you edit a ribbon tab, you will not see the changes to that ribbon tab until you close and reopen the system (assuming the ribbon tab is configured to open at startup).

#### To edit a ribbon tab:

1. From the **Axiom** tab, in the **Administration** group, click **Manage > Ribbon Tabs**.  
You can also access the Ribbon Tabs Library from the Explorer task pane.
2. In the **Ribbon Tabs Library**, navigate to the ribbon tab that you want to edit, then double-click it to open.
3. In the **Edit Ribbon Tab** dialog, edit the ribbon tab as desired.
4. Click **Apply** or **OK** to save the ribbon tab. If you would rather save this ribbon tab as a new file, you can click **File > Save As** from the dialog toolbar.

### ► Deleting a ribbon tab

You can delete a ribbon tab at any time. It does not matter if the ribbon tab is currently open on the ribbon in your session or any other user's session.

If a ribbon tab is currently open in a user's session and that ribbon tab file is deleted, the ribbon tab will remain useable in that session until the user exits the system. If the deleted ribbon tab was configured to open on startup, no special steps are required to remove it from user configurations—the next time users log in, the ribbon tab will simply no longer exist and therefore will be ignored by the startup configuration. However, it is a good idea to remove the obsolete configuration from Security so that user configurations match what you expect to be displayed.

### To delete a ribbon tab:

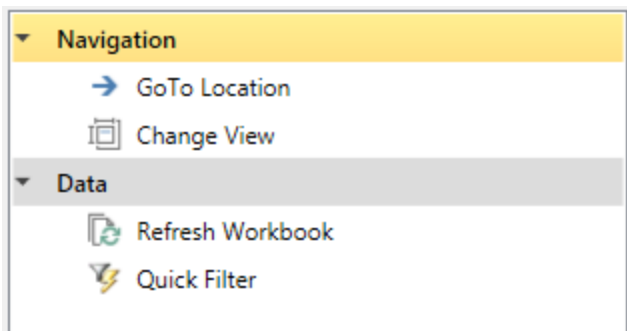
1. From the **Axiom** tab, in the **Administration** group, click **Manage > Ribbon Tabs**. You can also delete ribbon tabs using the Explorer task pane.
2. In the **Ribbon Tabs Library**, navigate to the ribbon tab that you want to delete, then right-click and select **Delete**.

## Ribbon tab design considerations

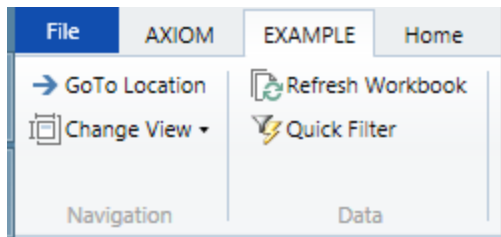
Keep in mind the following design considerations when creating ribbon tabs.

### ► Creating ribbon tabs with multiple groups

All top-level items in a ribbon tab define groups within the ribbon. Each group can have one or more child items that display as buttons in the group.



*Sample ribbon tab definition with two groups*



*Display of tab in the ribbon*

Most ribbon tabs will have multiple groups. Groups are used to organize the ribbon into logical sections and help users find the buttons they are looking for. If all buttons in the ribbon tab are within a single group, this may make the ribbon tab difficult to use.

In most cases, the only valid property for a top-level item is the display text to define the group name. Top-level items in a ribbon tab cannot be assigned to a shortcut target and do not use any of the display options. However, there are two exceptions:

- The Excel Command Button command can be placed at the top level, to display an entire Excel group in the ribbon tab.

- An Axiom Managed Group command can be placed at the top level, to include the entire contents of an Axiom group in the ribbon tab.

Both of these exceptions are discussed later in this design considerations topic.

### ► Using Axiom Managed Groups in a ribbon tab

Axiom Managed Groups are special commands that allow you to include the entire contents of a particular ribbon group in a custom ribbon tab. The contents of each group are based on the default Axiom ribbon tab that is delivered with the application.

The advantage of using an Axiom Managed Group is that the group will remain in sync with the default Axiom ribbon tab as you upgrade the software. So if a new feature is added to the File Output group in a particular release, and you are using the Axiom Managed Group command for File Output in a custom ribbon tab, then the new feature will automatically be included in the custom ribbon tab. If instead you have customized the File Output group and are no longer using the Axiom Managed Group command, then you would need to manually add the new feature to the custom ribbon tab if you wanted it to display.

The built-in Axiom ribbon tab (`AxiomMain.AXL`) is made using Axiom Managed Groups. If you want to create a new custom ribbon tab that uses these groups, it is easiest to copy this file and then edit the copy as desired. However, if you want to manually add an Axiom Managed Group to a custom ribbon tab, you can do so as follows:

- In the **Axiom Explorer** pane of the **Edit Ribbon Tab** dialog, navigate to the **Groups/Sections** folder of the **Command Library**.
- Drag and drop the desired group from the Command Library to the **Ribbon Structure** pane, as a top-level group item.

It is not possible to add a new "blank" group item and then link it to the group command, because by default the Shortcut Target field is not available for group items. You must either drag and drop the command as a top-level item directly, or create a new child item and link it to the command, then move the child item up to the top level.

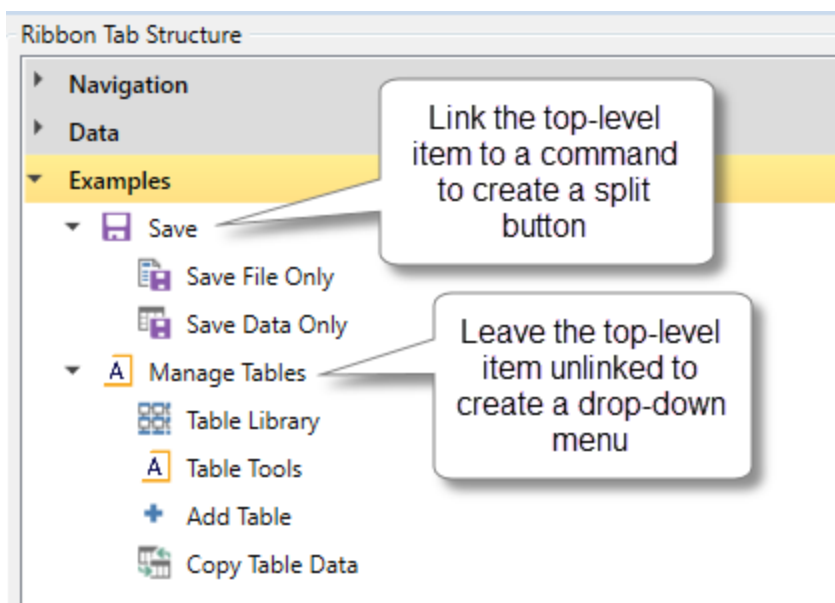
If a ribbon tab already contains an Axiom Managed Group, and you want to customize the contents of that group to remove or add features (or otherwise modify the configuration of individual items in the group), then you can "convert" the group to its individual commands. To do so, right-click the group and then select **Convert group to individual items**. The group will be replaced with all of the individual items in that group, so that you can modify the group as desired. However, keep in mind that converted groups are no longer system-managed and will not automatically update for future changes.

### ► Creating drop-down menus and "split buttons" in a ribbon tab

Non-group items in a ribbon tab can also have child items. If the user clicks on the "parent" item in the ribbon tab, a drop-down menu allows the user to click one of the child items. This will either perform the configured action for the child item, or open a further sub-menu if the item has child items.

Some features that you can link to in a ribbon tab are automatically drop-down menus. For example, if you use the **Axiom Function** command and select a function group in the shortcut parameters, then clicking this button will automatically display a drop-down menu of the functions in that group. In this case you should not place any child items under this item, as this will cause the default menu to not display as expected.

It is also possible to configure "split buttons" in ribbon tabs. A split button is a button that performs a default command, but also has a secondary drop-down menu where users can select related commands. For example, the Refresh button on the default Axiom tab is a split button. To create a split button, you assign a shortcut target to the "parent" item, and then also assign child items to that item. This configuration will automatically render as a split button in the ribbon tab.

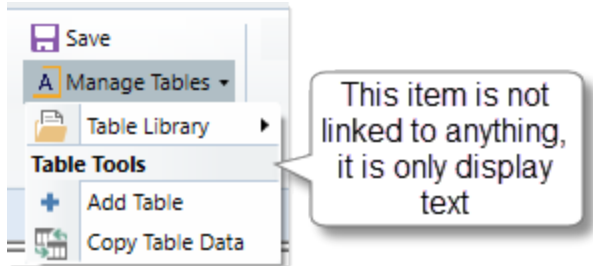


*Example ribbon tab structure*

When this ribbon definition is rendered as a ribbon tab, the Examples group will have two buttons:

- **Save button:** Because the Save parent item is linked to a command, users can click on the Save button to perform a save, or they can use the secondary drop-down menu to save the file only or data only. This would be similar to the Save button on the default Axiom tab.
- **Manage Tables button:** Because the Manage Tables parent item is *not* linked to a command, clicking that button does not perform an action. Instead it brings up a drop-down menu where users can open the Table Library or add a table.

If the split button or drop-down menu has several items in it, you may want to use separator text to organize the menu. You can do this by adding an item where you want the separator text to display, and then only defining display text for that item. This non-linked item will automatically display as separator text in the drop-down menu. For example:



### ► Hiding items in the ribbon tab

By default, the option to **Show restricted item** is selected for all child items in a ribbon tab. This means that the item will always display in the ribbon tab, but it will be grayed out and unavailable if the user does not have permission to use the feature, or if the feature does not apply to the current context.

In most cases, it is recommended to leave this option selected. It may be disorienting to users to have options in the ribbon tab appear and disappear if it is not obvious why this behavior is occurring. Users may wonder why a particular command no longer displays on the ribbon tab, without realizing that the command does not apply to the current context. However, in certain cases it is best to disable this option—such as when placing file groups and file group categories on the ribbon, so that users do not see file groups that they do not have access to.

Leaving this option selected for most items in a ribbon tab also avoids the potential issue of displaying entirely blank ribbon tabs. Depending on the commands in your ribbon tab, it is possible to end up in situations where none of the commands apply to the current context, and therefore the entire ribbon tab is blank. For example, if your home page is an Axiom form instead of a spreadsheet file, then none of the commands that can be normally used in a spreadsheet file apply to this context, and they will not display on the ribbon tab unless **Show restricted items** is selected.

**NOTE:** This option is not available for Axiom Managed Groups; the visibility of commands in the group is system-managed.

### ► Including Excel features on an Axiom ribbon tab

You can include Excel features on an Axiom ribbon tab, using the **Excel Command Button** in the Command Library. You can enter Excel command IDs to incorporate virtually any Excel feature on the ribbon. This feature is only supported for use in the Excel Client; the Windows Client will ignore any item set to the Excel Command Button.

It is also possible to include entire Excel command groups on the ribbon. To do this:

- From the Axiom Explorer pane in the Edit Ribbon Tab dialog, locate the Excel Command Button command in the Command Library, and then drag and drop it into the ribbon tab structure as a top-level item.

- Use the shortcut parameters to specify the appropriate **Excel Control ID** for the group that you want to display. The **Excel Control Type** must be set to **Group**.

Group codes cannot be looked up in the Excel Options dialog like button codes. You will need to download the appropriate resources from Microsoft to look up the desired group codes, as discussed in the Excel Command Button topic referenced above.

- The group node cannot have any child items. Excel will automatically populate the group node with the features that normally display in the specified group.

### ► Displaying child items inline

If an item has child items, you can choose to display those items inline (at the level of the parent item), omitting the display of the parent item. To do this, you must enable **Display child items inline** for the parent item.

For example, you may want to create a drop-down menu with a couple of feature commands at the top, followed by the contents of a particular folder (similar to the Reports menu). To do this, you can add the folder to the ribbon tab structure, and then enable **Display child items inline** for that item. When the ribbon is rendered to users, the folder item will be omitted and instead the individual files in the folder will dynamically display in the drop-down menu.

The inline behavior applies whether the child items are defined in the ribbon tab structure, or if the child items will be generated dynamically based on the parent item. In the previous example, the individual files aren't defined in the ribbon tab structure, they are generated dynamically based on the folder parent item. However, keep in mind that if the child items are displayed directly on the ribbon instead of in a drop-down list, then they will not update dynamically as changes are made to the folder in that session.

## Ribbon tab properties

The following properties are available for items in a ribbon tab. If you are editing one of the built-in ribbon tabs (Axiom and Axiom Designer), see the following for more information on those tabs: [Built-in task panes and ribbon tabs](#).

The available settings for each item in a ribbon tab depends on whether it is a top-level group item, or a child item in a group.

### ► Top-level group items

Each top-level item in the ribbon structure is a group item. Group items are identified in the ribbon structure with a gray bar.

Generally speaking, group items define the label for each "group" or section of items in the ribbon tab. Most group items only have a single property of Group Name. However in a few cases groups can have assigned Shortcut Targets and can be used to include entire groups of content in the ribbon.

Item	Description
Group Name	<p>The label to display for the group in the ribbon tab.</p> <p>If the group has an assigned Shortcut Target, then you can leave this box blank and the group name will be determined by the shortcut target.</p> <p>Otherwise, if no group name is defined then the group will have no label in the ribbon tab. The only indicator of a separate group will be the divider lines between groups.</p>
Use large image	<p>This option only applies if the group item is an Axiom Managed Group. If this option is selected, then all items that belong to the managed group will display using the large versions of their associated icons, instead of the small versions. By default, all items display using the small versions of their associated icons.</p> <p><b>NOTE:</b> Using large icons can quickly fill up the ribbon tab. It is recommended to use small icons for managed groups unless you know there will be adequate space on the ribbon tab for the large icons.</p>
Shortcut Target	<p>The target command in the Command Library to use for the group item. This is only permitted in two circumstances:</p> <ul style="list-style-type: none"> <li>You can drag and drop the <b>Excel Command Button</b> command as a top-level item and configure it to display a predefined Excel group. This is only supported for use in the Axiom Excel Client; the Axiom Windows Client will ignore the group and hide it in the ribbon tab.</li> <li>You can drag and drop an Axiom Managed Group command as a top-level item, to automatically display all items of that group in the ribbon tab.</li> </ul> <p><b>NOTE:</b> It is not possible to add a "blank" group item to the ribbon structure and then link it to the desired shortcut target, because the Shortcut Target field does not display by default for group items. Instead, you must drag and drop an eligible command from the Axiom Explorer pane to the Ribbon Structure pane. (Or, you can add a child item to the ribbon structure, link it to the desired command, and then move that child item up to the group level. This is only permitted if the command is eligible to be used at the group level.)</p>
Shortcut Parameters	<p>This section only applies if the group item uses the Excel Command Button. You can use the shortcut parameters to specify which Excel group should display on the ribbon tab.</p>

## ► Child items

Each child item within a group defines a feature or file to display in the ribbon tab.


Item	Description
Display Text	The text to display for the item in the ribbon tab. If the item has a defined shortcut target to an Axiom file or feature, then you can leave this box blank, and the display text will be the name of the file or feature.
Tool Tip	The text to display as a tool tip when a user hovers their cursor over the item. This text can be helpful to explain the purpose of the item within the context of the ribbon tab. If no tool tip text is defined, then the tooltip displays the full path of the shortcut target (if defined).
Custom Image	<p>The image to display for the item on the ribbon tab. Click the <b>Browse</b> button [...] to select an image that is stored in the Reports Library. If the image is not already saved in the Reports Library, you can right-click a folder and select <b>Import</b> to import the image (if you have the appropriate rights to do so).</p> <p>The image must be at least 32x32 pixels, and the file format must be JPG or PNG. Larger images will be resized to fit. The image should be square because the aspect ratio will be retained when resizing.</p> <p><b>NOTE:</b> End users must have permission to the image file in order to see it rendered in the task pane. It is recommended to create a dedicated Images folder in the Reports Library and store all images in this location. You can grant access to this folder using the Everyone role, or you can create subfolders and grant access to users and roles as needed.</p> <p>If no custom image is defined, then the default Axiom image for the shortcut target will be used.</p> <p>This option does not apply if the shortcut target for the item is a command that displays with a check box (such as Freeze Panes).</p>

## Display settings

Item	Description
Display child items inline	<p>Select this option if you want all of this item's child items to display inline, omitting this item. For example, this might be used when linking to a folder, to hide the "folder" node and instead display the resulting files inline.</p> <p><b>NOTE:</b> If this option is selected for an item that does not have any child items, then the item will be hidden in the ribbon tab.</p>

Item	Description
Show restricted item	<p>Select this option if you want this item to always display in the ribbon tab, regardless of the user's security permissions and regardless of the current context. This option is selected by default. If the item cannot be used by the user, then it will display as grayed out.</p> <p>If this option is disabled, then the item will not display on the ribbon tab if it cannot be used. It is common to disable this option when placing file groups on a ribbon tab, so that users only see the file groups that they have security permission to access.</p>
Use large image	<p>Select this option if you want the item to display using the large version of its associated icon, instead of the small version. By default, all items display using the small version of the associated icon.</p> <p>This option does not apply if the shortcut target for the item is a command that displays with a check box (such as Freeze Panes), or if the item is rendered in a drop-down list on the ribbon. Only items that display directly on the ribbon as buttons are eligible to use large icons.</p>

#### Shortcut settings

Item	Description
Shortcut Target	<p>The target file or feature for the item. Click the <b>Browse</b> button [...] to select the desired file or feature. You can select any item that you can navigate to within Axiom Explorer, including using commands in the Command Library. For more information, see <a href="#">Linking to Axiom files and features in a task pane or ribbon tab</a>.</p> <p>Alternatively, you can drag and drop items from the Axiom Explorer pane in the editor directly to the ribbon tab structure, to both create a new item and link it to that file or feature.</p> <p>Once a shortcut target is defined, Axiom places the necessary syntax to open the target within the <b>Shortcut Target</b> box. It is best not to manually edit this text, as you may inadvertently render the syntax invalid. If you want to select a different target, use the Browse button to select the target rather than editing the target syntax. If you no longer want the item to link to a shortcut target, click the Delete button  to remove the shortcut.</p> <p><b>NOTE:</b> All child items in the ribbon tab structure should be assigned a shortcut target, with one exception. If you are configuring an item as a split button or a drop-down menu, and you want to place a separator in the drop-down menu, then you would leave the shortcut target for the item blank and just define display text. Otherwise, child items without an assigned shortcut target will not display in the ribbon.</p>

Item	Description
Shortcut Parameters	<p>Most shortcut targets have one or more associated shortcut parameters that impact the behavior of the linked file or feature when it is opened from the ribbon tab. The available parameters depend on the shortcut target—for example, report files have different parameters than tables.</p> <p>For more information, see the following:</p> <ul style="list-style-type: none"> <li>• <b>Shortcuts</b> You can link to various files and other items in Axiom using shortcuts. For more information, see Axiom Help: <b>Reference &gt; Shortcuts</b> (or search on code <b>AX1169</b> to bring up the Shortcuts section).</li> <li>• <b>Command Library</b> You can link to various Axiom features using commands in the Command Library. For more information, see Axiom Help: <b>Reference &gt; Command Library</b> (or search on code <b>AX2685</b> to bring up the Command Library section).</li> </ul>

## Assigning ribbon tabs to users

You can assign ribbon tabs to users and roles using the Startup tab in Axiom Security. When a user starts Axiom, their assigned startup ribbon tabs will automatically open.

Ribbon tabs can only be opened at startup. It is not possible to allow users to open ribbon tabs "on demand". Generally speaking, the only reason to grant a user file access to ribbon tabs in the Ribbon Tabs Library is if the user needs to create and edit ribbon tabs.

### ► Assigning as startup files

To configure a ribbon tab to open on system startup for a particular user or role, use the **Startup** tab of Security. Any ribbon tabs listed on the Startup tab will open automatically when the user starts the Excel Client or the Windows Client. Ribbon tabs do not apply to the Web Client. For more information on assigning startup ribbon tabs, see the *Security Guide*.

When ribbon tabs are assigned as startup files, users do *not* otherwise need to be granted access to these files. The files will open automatically at startup. Keep in mind that the visibility of the ribbon tab depends on its configuration. Using the shortcut properties for the startup file, you can configure the ribbon tab so that it only displays if certain conditions are met, such as:

- Whether the user is an administrator
- Whether the user has access to the Sheet Assistant
- Whether a particular type of file is open

For example, a ribbon tab can be associated with report file types. Therefore, although the ribbon tab is technically opened at startup, it does not actually display to the user until a report file is opened.

In most cases, you will assign startup ribbon tabs on a per role basis. For example, you might have a Budget User role, and you want all users in this role to see a simple ribbon tab that presents the handful of items that they need to access. Alternatively, if all users in a system need to see a particular ribbon tab on startup, you can configure it for the Everyone role.

Startup ribbon tabs will be opened in the following order:

1. Ribbon tabs assigned to the Everyone role.
2. Ribbon tabs assigned to other roles that the user belongs to (multiple roles are sorted in alphabetical order).
3. Ribbon tabs assigned to the user.

All custom ribbon tabs display before (to the left of) any Excel ribbon tabs. In the case of the Windows Client, custom ribbon tabs display before the Home tab. Once a ribbon tab is opened, it cannot be closed by the user (though it may become hidden depending on its configuration and the current context).

#### ► Access to the Ribbon Tabs Library

It is not possible to open a ribbon tab "on demand" from the Ribbon Tabs Library. If a user double-clicks on a ribbon tab file, it will open in the ribbon tab editor, not in the ribbon. The only way to access a ribbon tab is to assign it as a startup file and then restart the application. Therefore, there is no reason to give a user file permission to ribbon tab files in the Ribbon Tabs Library unless the user needs to create and edit ribbon tabs.

If you have non-administrator users who need to create and edit ribbon tabs, those users must be granted the **Administer Task Panes** permission as well as read/write access at a file or folder level in the Ribbon Tabs Library.

## Linking to Axiom files and features in a task pane or ribbon tab

Items in a custom task pane or a ribbon tab can be linked to an Axiom file or feature. To link an item to a file or feature, you use the **Shortcut Target** property for the item. Depending on the shortcut target, there may also be **Shortcut Parameters** to further configure the behavior of the shortcut.

**To define a shortcut for an item in a task pane or a ribbon tab:**

1. In the **Edit Task Pane** dialog or the **Edit Ribbon Tab** dialog, select the item that you want to link to a file or feature.

2. Click the **Browse** button [...] to the right of the **Shortcut Target** box. Then, in the Axiom Explorer dialog, navigate to the item that you want to link to.

You can link to any folder, file, or other item that is displayed in Axiom Explorer. Additionally, the Command Library is available when defining task panes and ribbon tabs, so that you can link to Axiom features. For more information, see the following reference material:

- **Shortcuts**

You can link to various files and other items in Axiom using shortcuts. For more information, see Axiom Help: **Reference > Shortcuts** (or search on code **AX1169** to bring up the Shortcuts section).

- **Command Library**

You can link to various Axiom features using commands in the Command Library. For more information, see Axiom Help: **Reference > Command Library** (or search on code **AX2685** to bring up the Command Library section).


**NOTE:** You can also link items to files and features by using the Axiom Explorer pane within the editor. If you drag and drop an item from the Axiom Explorer pane to the task pane or ribbon tab definition, then a new item will automatically be created and that item will be linked to the appropriate shortcut target.

3. Configure the available **Shortcut Parameters** for the item, if applicable.

Some items have additional options that impact how the item behaves in the task pane or the ribbon tab. The available options are specific to the item type.

4. Define the **Display Text** for the item as desired.

By default, the item will display using the name of the shortcut target—for example, the file name if the target is a file. If you want to specify a different name, then enter different text into the **Display Text** box.

If you assign a shortcut target to an item and then later you want to remove the shortcut, click the **Delete** button  to the right of the box. You can also click the Browse button again to select a different shortcut target.

## ► Visibility of linked items

The visibility of a linked item in a task pane or a ribbon tab depends on the following:

- Whether the user has rights to access the linked file or feature. In most cases, if a user does not have permission to an item, the item does not display in the task pane or ribbon tab. For example, if the item links to a report that the user does not have access to, the item does not display because the user cannot open the report.

- Whether the linked feature applies to the currently active file. In most cases, if the item is a file-related feature but it does not apply to the currently active file type, then the item does not display in the ribbon tab. For example, if the item links to the Add Rows command, but the currently active file is a report, then the item does not display because calc method libraries cannot be used in report files.
- Whether the linked item is valid. If the shortcut target of an item is invalid, then the item does not display in the task pane or ribbon tab because it cannot be used. A user with the appropriate permissions must go to the editor to see and fix the invalid item. For example, if the item links to a report but the report is later deleted, the item does not display because it is invalid.
- Whether **Show restricted item** is enabled for the item. If enabled, then the item will always display, regardless of any of the previously-listed factors. If the item cannot be used for any reason, then it displays as grayed out. You might enable this option if you want the items in the task pane or ribbon tab to remain constant for all users and all contexts.

**NOTE:** The visibility rules above are general guidelines. Certain commands have different behavior. See the help topic for the specific command for more information on the visibility rules for that command.

The default state of **Show restricted item** depends on whether you are creating a task pane or a ribbon tab. In task panes, the option is disabled by default, meaning that items will be hidden if the user cannot use them. In ribbon tabs, the option is enabled by default, meaning that items will display as grayed out if the user cannot use them. For more information, see [Task pane design considerations](#) and [Ribbon tab design considerations](#).

## Converting task panes and ribbon tabs

You can convert an existing task pane file into a ribbon tab, and vice versa. The general structure of the task pane or ribbon tab definition is applicable to both formats.

When you convert a task pane or a ribbon tab to the other format, a copy of the original file is created and that new file is converted. The original file remains intact. For example, if you convert a task pane named "Reports," a new ribbon tab file is created within the Ribbon Tabs Library named "Reports". You can then rename the new file as needed.

Task panes and ribbon tabs can use settings that don't apply to the other format, and can link to files and features that aren't supported in the other format. Generally speaking, if this occurs the inapplicable setting or unsupported feature will simply be ignored in the new format after conversion. However, you should test the file in its new format to make sure that everything displays and works as intended.

### To convert a task pane or a ribbon tab:

1. In Axiom Explorer or the Explorer task pane, locate the task pane file or ribbon tab file that you want to convert.
2. Right-click the file, and then select either **Convert to ribbon** or **Convert to task pane**.

A copy is created of the original file, and that copy is converted to the specified format. The copy is placed in the corresponding library. For example if you convert a ribbon tab to a task pane, the copy is created in the Task Panes Library.

### ► Considerations when converting a task pane to a ribbon

The following task pane settings are inapplicable to ribbon tabs and will be ignored in that format:

- Display child item images
- Auto-number child items

Some task pane shortcuts, such as the built-in feature controls for Axiom Explorer and Process Management, are not supported in the ribbon format. These items will be ignored when the ribbon is displayed.

Some designs that are well-suited for the task pane format are not well suited for the ribbon format, although they will be technically converted. For example, if the task pane depicts a numbered process, it will be converted to the ribbon but the numbers will be lost, and the process flow will not be as clear as it would be in a task pane.

### ► Considerations when converting a ribbon to a task pane

The following ribbon settings are inapplicable to task panes:

- Use large image (option will be ignored in the task pane)
- Shortcut targets defined on items with children (users will be unable to launch the shortcut target)

Task panes do not support the concept of a "split button" where you can click on the parent button to perform a particular action, or you can open a sub-menu to perform other actions. In the task pane format, if an item has child items then double-clicking the parent item will only expand or collapse the child items; no action will be performed. If a shortcut target is assigned to a parent item in a task pane, this target will be ignored when the task pane is in use. Within the task pane editor, this configuration will result in a validation error.

## Built-in task panes and ribbon tabs

In addition to the custom task panes and ribbon tabs that you can create for your system, Axiom provides certain built-in task panes and ribbon tabs.

Some of these built-in items are entirely system-controlled, such as the Axiom ribbon tab, the Sheet Assistant task pane, or the File Processing task pane. These items cannot be customized.

Other built-in items are provided by default, but can be customized if desired. You can edit these items, modify their display behavior, or disable them entirely if desired. These customizable items are:

- Axiom Designer ribbon tab
- Explorer task pane
- Process task pane

## Customizing the Axiom ribbon tab

Axiom provides a built-in Axiom ribbon tab to provide access to Axiom functionality. By default, this tab is assigned as a startup file for the Everyone role in security, and is configured to display to all users in all circumstances. If desired you can do any of the following:

- Customize the contents of the Axiom Designer ribbon tab
- Create different versions of the tab and assign them to different users and roles
- Disable the tab for certain users and roles

**IMPORTANT:** If you choose to customize the Axiom ribbon tab, it is possible that you could inadvertently create an environment where no users can access a certain feature, because that feature is no longer available on any menu. You should take care to ensure that administrators always have access to the full set of Axiom features. If you are customizing a version of the Axiom ribbon tab that is meant for administrators, and you choose to remove a feature from that tab, you should make sure that feature is available to administrators in some other way—either in another custom ribbon tab or task pane that is available for administrator use, or in the Axiom right-click menu.

### ► Default behavior

When a new system is created, or when an older system is upgraded, a copy of the Axiom ribbon tab is placed in the root of the Ribbon Tabs Library, using the file name `AxiomMain.AXL`. This copy is listed as a startup ribbon tab for the Everyone role.

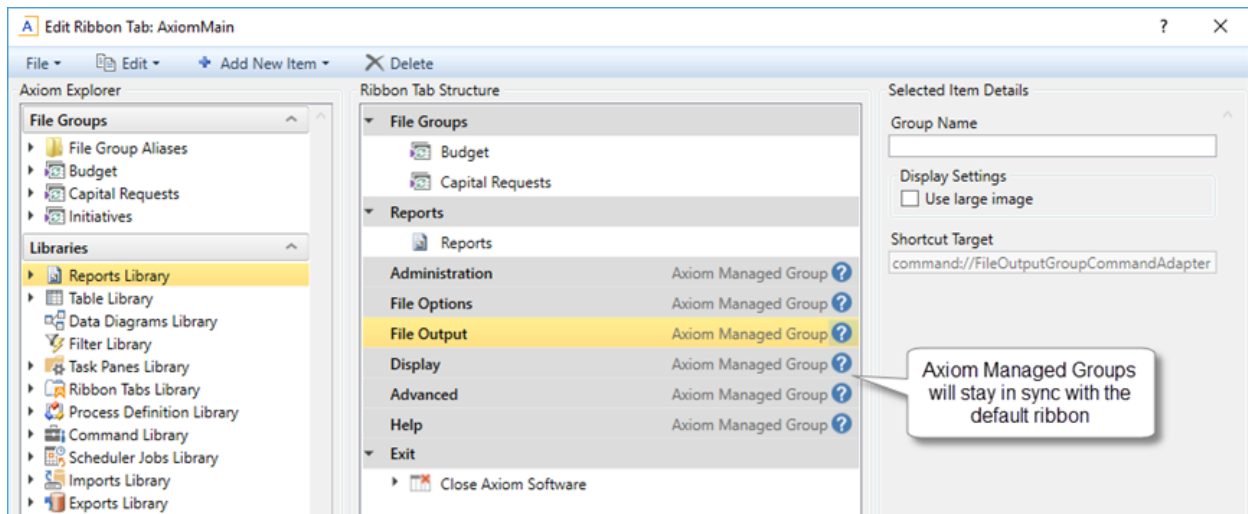
**NOTE:** You can rename the file and/or move it into a subfolder without breaking the existing startup configuration. For example, you may want to create a Startup subfolder in the Ribbon Tabs Library to hold all of the ribbon tabs that are configured to open at startup.

This custom ribbon tab replaces the old system-controlled Axiom ribbon tab. Using a custom ribbon tab for the Axiom tab allows clients to fully customize the Axiom menu as desired. If you do not want to customize the Axiom menu, then you can leave the ribbon tab as is.

## ► Customizing the contents of the Axiom tab

You can customize the contents of the Axiom ribbon tab by modifying the `AxiomMain.AXL` file, or by copying the file and creating different versions for different user audiences. You can add features to the tab, reorganize the tab, or remove features from the tab. For more information on creating and editing ribbon tabs in general, see [Ribbon tabs](#).

The built-in Axiom ribbon tab is designed using Axiom Managed Group commands. These group commands correspond to the groups (sections) on the default Axiom ribbon, such as Administration, File Options, and File Output. When a group command is used, all features that are part of that group are automatically included on the ribbon.



**NOTE:** A few groups in the default Axiom ribbon tab are not built using group commands. The **File Groups** group is always customized per installation and therefore does not have a defined set of commands. The **Reports** group and the **Exit** group do not have group commands because there is only one button in each group.

The benefit of using managed group commands is that the contents of the group will remain in sync with the default Axiom ribbon. This means that if Axiom adds a new feature to the **File Options** group in a future release, then any custom ribbon tabs (or task panes) that use the managed File Options group will automatically update to display that new feature. If instead you decide to customize your ribbon tab so that the File Options group consists of individual commands instead of the managed group command, then your ribbon tab would not automatically update for the new feature. You would have to manually edit your ribbon tab to add it.

Keep in mind the following when customizing the contents of the Axiom ribbon tab:

- It is recommended to use Axiom Managed Group commands whenever it makes sense to do so, because this will make it easier to access new features in the future.

- Use caution before removing entire groups from the ribbon tab. Remember that if a user does not have any access to any items in a particular group, then that group will not display on the ribbon.

For example, it is not necessary to remove the Administration group from a ribbon tab if you do not want end users to see it, because by default it will not display to those users anyway. But if you choose to remove it, then any end users who do have special security permissions to certain administration features will now have no way to access those features. You should either leave the Administration group on the ribbon and rely on security permissions to hide or show it as necessary, or make sure that you identify those end users who need special access to certain features and assign them a different version of the ribbon tab that contains those features.

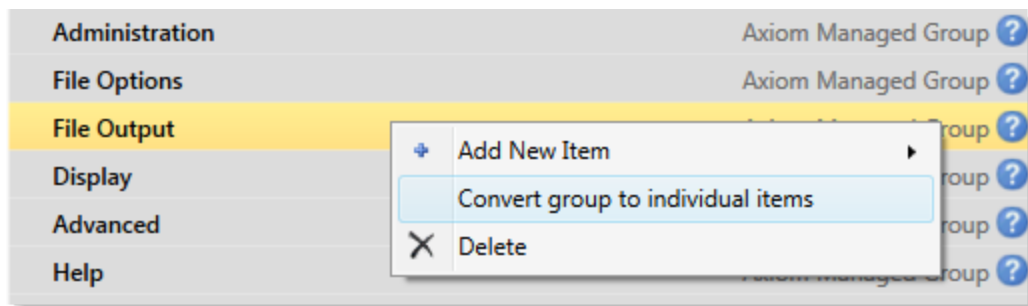
- If you absolutely need to customize the contents of a group, then the easiest way to begin is to "convert" the group to its individual items. You can convert a group by right-clicking it and selecting **Convert group to individual items**. This conversion process removes the group command from the ribbon and replaces it with a collection of individual commands that are configured to match the way those commands display in the group. You can then remove individual commands from the group, or change the configuration of these commands, or add different commands to the group.

#### ► Example customization

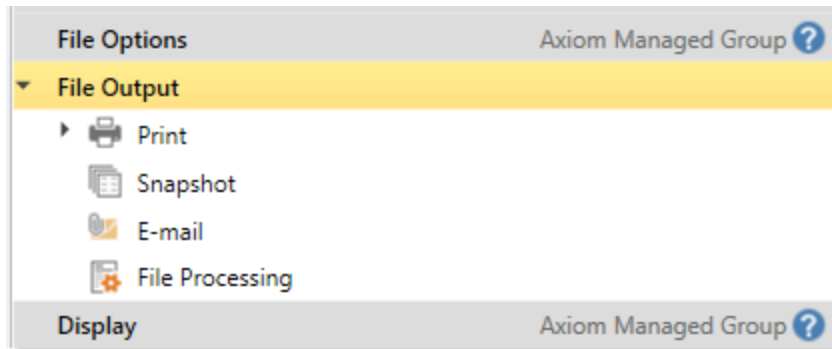
Many clients have requested the ability to create different menus for administrators versus end users. You can do this by creating different versions of the Axiom ribbon tab and then assigning them to different users and roles.

Imagine that you do not want your end users to have access to the Snapshot feature on the default Axiom ribbon tab. You can do the following:

- Create a copy of `AxiomMain.AXL` and name it something like `AxiomEndUser.AXL`.
- Modify `AxiomEndUser.AXL` to remove the Snapshot feature:
  - Right-click the **File Output** group, then select **Convert group to individual items**.



- A warning message informs you that the group will no longer be system-managed. After clicking **OK** to continue, there is now a regular top-level item with a Group Name of File Output, followed by child items for each feature in that group.



- In the converted File Output group, right-click the items for **Snapshot** and **E-mail** and then click **Delete**. (The E-mail Workbook feature also allows taking a snapshot, so you would need to remove both items if you wanted to completely remove the feature from the ribbon.)
- Modify Axiom security so that end users are now assigned the `AxiomEndUser.AXL` ribbon tab as a startup file instead of `AxiomMain.AXL`.

The way that you do this will depend on how your security is set up. If all of your end users belong to certain roles, then you can assign `AxiomEndUser.AXL` to those roles. You can then modify the configuration of the Everyone role so that `AxiomMain.AXL` only displays to administrators. Or, you could remove `AxiomMain.AXL` from the Everyone role entirely, and instead assign it to an administrator role or individual administrator users.

When you assign a ribbon tab as a startup file, remember to set the **Axiom Tab Name**. If you do not define the Axiom Tab Name, then the tab will use the file name (in this case, `AxiomEndUser`).

### ► Restoring the default Axiom ribbon tab

If you modify the default `AxiomMain.AXL` file and then later you decide that you want to restore the file to its original configuration, a copy of the default file is always available in `\Axiom\Axiom\System\Document Templates\Sample Ribbon Tabs`.

Keep in mind that if you delete the copy in the Ribbon Tabs Library and then replace it with a copy from the sample folder, you will need to reconfigure your security settings to point to the new file (because startup shortcuts are based on document ID, not on file name and location). Alternatively you can import the default file over the copy in the Ribbon Tabs Library. To do this in Axiom Explorer:

- Right-click the default file in the Sample Task Panes folder, and select **Export** to save it to your local file system.
- Right-click the Task Panes Library and select **Import Files** to import the file from your local file system. This will overwrite the existing file if they both have the same name, and retain the document ID.

**IMPORTANT:** If your system is accidentally put in a state where an administrator cannot access necessary system features using the Axiom ribbon tab (or if the Axiom ribbon tab does not display at all for an administrator), administrators can correct the situation by accessing Axiom Explorer from the File menu in the Windows Client: **File > Launch Axiom Explorer**. From here an administrator can perform actions such as editing their assigned ribbon tab to add the necessary features, or they can create a temporary task pane to provide access to features such as Security (for example, if the administrator does not currently have an assigned ribbon tab and cannot access Security to assign one).

#### ► Disabling the Axiom tab for certain users and roles

In rare cases, clients may want to disable the Axiom tab entirely for certain users or roles. Typically this would only be done if you intend to provide access to all necessary functionality using a custom task pane instead of a ribbon tab.

To do this, you would remove `AxiomMain.AXL` from the Everyone role and instead assign it only to the users and roles that need it (or you could adjust the configuration on the Everyone role so that the ribbon tab only displays to administrators). Any users and roles who are not assigned a ribbon tab would need to be assigned a custom task pane that is set up with all of the functionality they need.

## Configuring the Axiom Designer ribbon tab

Axiom provides a built-in Axiom Designer ribbon tab to provide various tools to assist in creating and testing files. By default, this tab is assigned as a startup file for the Everyone role in security, and configured to only display to administrators. If desired you can do any of the following:

- Customize the contents of the Axiom Designer ribbon tab
- Modify the configuration of the startup file on the Everyone role so that more users have access to the ribbon tab
- Remove the startup file from the everyone role and then reassign it to other users and roles as desired

#### ► Default behavior

When a new system is created, or when an older system is upgraded, a copy of the Axiom Designer ribbon tab is placed in the root of the Ribbon Tabs Library (file name: `AxiomDesigner.AXL`). This copy is listed as a startup ribbon tab for the Everyone role, and is configured as follows:

- **Requires Admin** is enabled. The Axiom Designer tab will only display to users who are administrators.
- **Requires Sheet Assistant** is enabled. The Axiom Designer tab will only display when the active file is an Axiom spreadsheet file and the Sheet Assistant is also present.

**NOTE:** You can rename the file and/or move it into a subfolder without breaking the existing startup configuration.

### ► Changing the startup configuration

If you want to expose the Axiom Designer ribbon tab to other users, you can change the startup configuration for the file. For example:

- You can leave the file on the Everyone role, but modify the shortcut parameters to remove the administrator-only requirement. You could allow all users to see it, or you could only require Sheet Assistant permission so that only "file designers" would see the ribbon tab. For more information on the available shortcut parameters, see the *Security Guide*.
- You can remove the file from the Everyone role, but instead assign it to different users and/or roles. For example you might have a particular role for report writers or other power users, and you could assign it to that role.

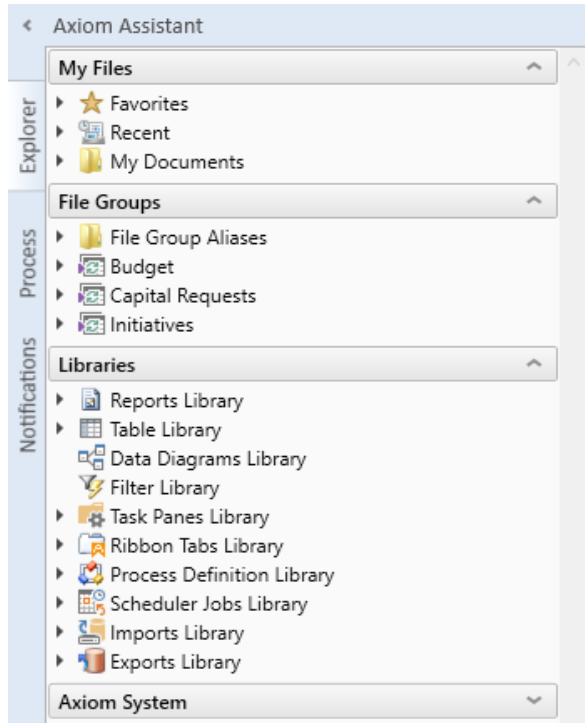
### ► Customizing the contents

If desired you can customize the contents of the Axiom Designer ribbon, by modifying the `AxiomDesigner.AXL` file. You can add additional features to the ribbon tab, reorganize the tab, or remove existing features. You could also copy the file and create different versions of the tab, and assign those versions to different users and roles. For more information on creating and editing ribbon tabs, see [Ribbon tabs](#).

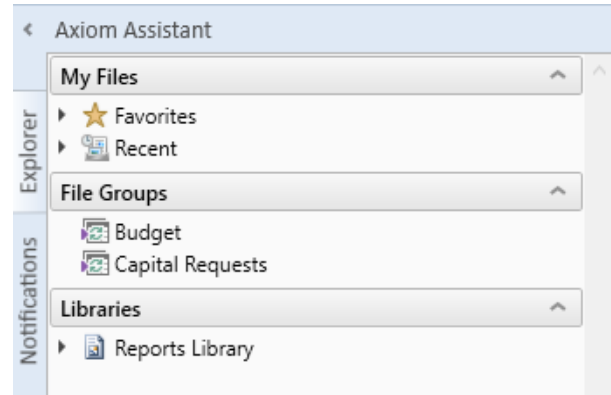
If you modify the default `AxiomDesigner.AXL` file and then later you decide that you want to restore the file to its original configuration, a copy of the default file is always available in `\Axiom\Axiom System\Document Templates\Sample Ribbon Tabs`. Keep in mind that if you delete the copy in the Ribbon Tabs Library and then replace it with a copy from the sample folder, then you will need to reconfigure your security settings to point to the new file (because the startup shortcuts are based on document ID, not on file name and location). You can instead import the default file over the copy in the Ribbon Tabs Library; this will retain the document ID.

## Configuring the Explorer task pane

Axiom provides a built-in Explorer task pane to provide users with quick access to their favorites, recent items, and all Axiom files that they have rights to access. By default, all users are given access to this task pane. If desired, you can disable use of this task pane entirely, or restrict access to certain sets of users.



Example Explorer task pane for an administrator

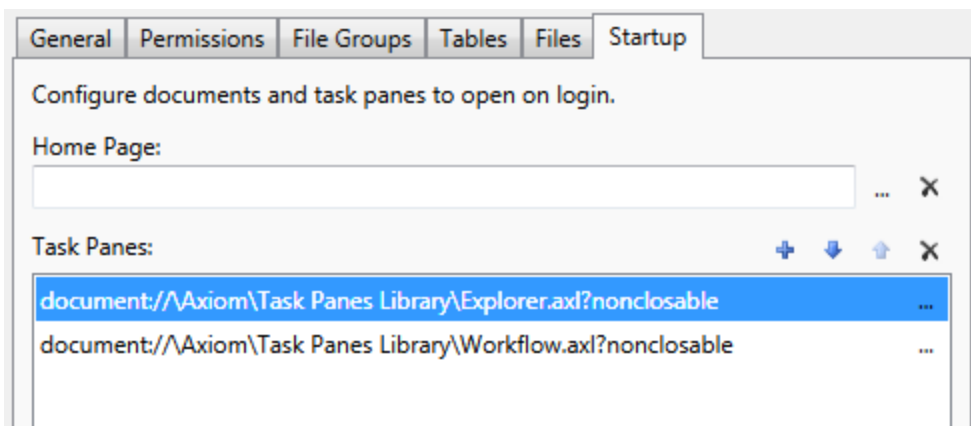


Example Explorer task pane for an end user

**NOTE:** Access to the Explorer task pane is managed using the startup file settings in Security. The **Administer Axiom Explorer** permission does not apply to the task pane—it only controls access to the full dialog accessible from **Manage > Axiom Explorer**. Any user can access the Explorer task pane.

## ► Default behavior

When a new system is created, a copy of the Explorer task pane is placed in the root of the Task Panes Library (file name: `Explorer.AXL`). This copy is listed as a startup task pane for the Everyone role, and is configured to prevent closing.



This means that the Explorer task pane is automatically opened when the system is started, for all users. Users cannot close the task pane, so it is always available. Users do not otherwise have access to the task pane (meaning, no access is granted to the file itself on the **Files** tab of Security).

**NOTE:** You can rename the `Explorer.AXL` file and/or move it to a subfolder without breaking the existing startup configuration. You can also edit the shortcut parameters for the startup configuration to use an alternate tab name, or to allow users to close the task pane if desired.

### ► Disabling the Explorer task pane

If you do not want to use the Explorer task pane at all in your system, then you can edit the startup settings for the Everyone role in Security, to remove the Explorer task pane from the list of startup task panes. Once it is removed from the Everyone role, then the task pane will not display for anyone unless you later manually add it to other roles or users.

If you want to delete the file entirely so that any users with access to the Task Panes Library cannot see it, you can do so. However, you cannot delete the file if it is open in your current session. You must first edit the settings for the Everyone role as previously described, and then you must exit the system and log in again. Now that the Explorer task pane is not open in your session, you can delete the file from the Task Panes Library.

If you deleted the `Explorer.AXL` file and then later decide that you want to use it, a copy of the file is always available in `\Axiom\Axiom System\Document Templates\Sample Task Panes`. Make a copy of this file and save it to the Task Panes Library, and then configure access in Security as desired.

### ► Modifying access to the Explorer task pane

If you want to use the Explorer task pane, but you do not want all users to have access to it, then you can modify the Security settings as desired.

- First, edit the startup settings for the Everyone role to remove the Explorer task pane from the list of startup task panes.
- Then, add the Explorer task pane to the startup settings for the applicable roles or users. Select the **Non-closeable** check box if you want users to always have access to this task pane. If you allow the task pane to be closed, remember that users without access to the Task Panes Library will not be able to reopen the task pane within the current session if they close it.

### ► Customizing the Explorer task pane

The Explorer task pane uses a single item, the **Axiom Explorer Tree View** from the Command Library. This control replicates the Axiom Explorer treeview within a task pane. While it is possible to manually recreate the Explorer look and feel in a task pane by linking to each individual component, using the control provides advantages such as:

- **Access to relevant features.** When using the Explorer control, users with the appropriate permissions gain access to item-specific commands via the right-click menu. For example, users can right-click a file to open it as read-only, or they can right-click a table to edit the table structure. If instead an item is linked on a task pane directly, then the item-specific right-click commands are not available.
- **Automatic updates.** The Explorer control renders the Axiom Explorer treeview as it currently exists. If future upgrades introduce new libraries or a changed folder structure, the control will remain in sync.

It is possible to make a few minor customizations to the Explorer task pane. If desired, you can use shortcut parameters to hide any of the major sections: My Files, File Groups, Libraries, and Axiom System Folder. Keep in mind that security permissions are always applied, so users without rights to a particular section or item will not see it in the task pane. You only need to hide a section if you do not want it to display for *any* users, within the task pane.

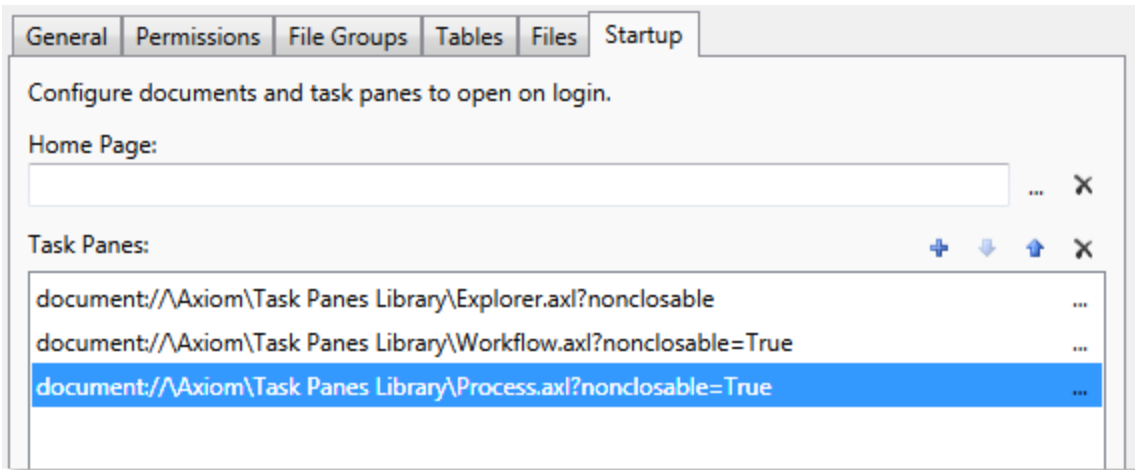
## Configuring the Process task pane

Axiom provides a built-in Process task pane to allow the assigned owners of process steps to easily complete their assigned tasks, and to allow administrators to monitor active processes. This is applicable if you are using the Process Management feature to define and manage processes.

By default all users are given access to this task pane, however, the task pane will only display to non-admin users if the user is the owner of an active step in a process. The task pane will display to administrators if any process is made active. If you never define or activate any processes in your system, or if a user never has any active tasks in a process, then the task pane will never display.

### ► Default behavior

When a new system is created, a copy of the Process task pane is placed in the root of the Task Panes Library (file name: `Process.AXL`). This copy is listed as a startup task pane for the Everyone role, and is configured to prevent closing.



This means that the Process task pane will dynamically display depending on whether any Process Management processes are ever made active. If they are, then administrators will always see the task pane if there are any active processes, and non-admin users will only see the task pane when they are the assigned owner of an active step in a process. Users do not otherwise have access to the task pane (meaning, no access is granted to the file itself on the **Files** tab of Security).

**NOTE:** You can rename the `Process.AXL` file and/or move it to a subfolder without breaking the existing startup configuration.

### ► Disabling the Process task pane

If you do not want to use the Process task pane at all in your system, then you can edit the startup settings for the Everyone role in Security, to remove the Process task pane from the list of startup task panes. Also, if you want to delete the file entirely so that any users with access to the Task Panes Library cannot see it, you can do that too. However, remember that users will only see the task pane when it is relevant to them, so we recommend leaving the configuration as is in case you change your mind in the future and decide to use Process Management.

If you deleted the `Process.AXL` file and then later decide that you want to use it, a copy of the file is always available in `\Axiom\Axiom System\Document Templates\Sample Task Panes`. Make a copy of this file and save it to the Task Panes Library, and then configure access in Security as desired.

### ► Customizing the Process task pane

The Process task pane uses a single item, the **User Process View** from the Command Library. This command does not have any shortcut parameters to configure its behavior.

If desired, you can include this control in a custom task pane along with other items as desired, and use that custom task pane instead of the built-in task pane. If you do this, you should remove the built-in task pane from the Everyone role as described previously, and instead configure security for your custom task pane as needed.

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