

ShareScope Training Zone

Your guide to getting the best out of ShareScope



Tutorial 21 - Customising Toolbars

Toolbars provide a very quick and easy way to move around ShareScope and can be easily customised to suit your personal style. You can select which buttons appear on a toolbar, the level of information included on each button, the position of the toolbar, which screens toolbars appear on and so on.

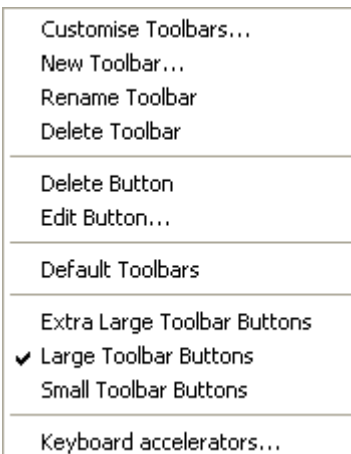
There are 4 default toolbars in ShareScope; the *Main*, *Settings*, *Graph*, and *News* bars:



Note: In ShareScope Gold, the News and Graph toolbar will, by default, only appear in the News and Graph screens respectively. To change this, please see the section on [Visibility](#) below

Toolbar Context menu

As with other screens in ShareScope, toolbar options can be accessed via a context menu. To view the context menu, simply by right-click on any toolbar.

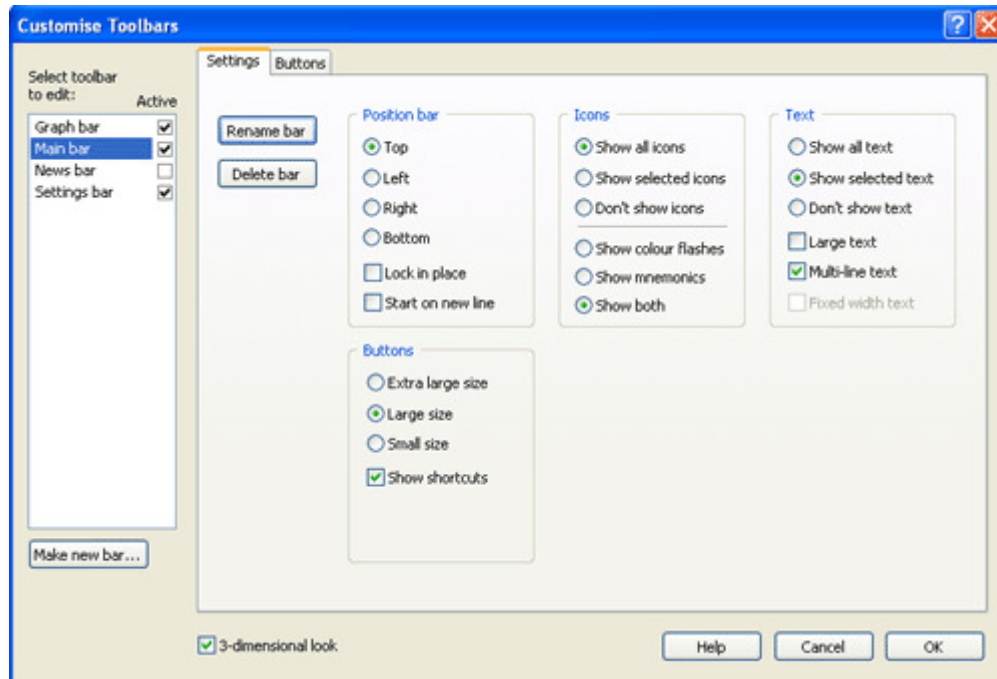


This menu provides a shortcut to many of the options available within the **Customise Toolbar...** dialog, which we will discuss in the next section.

One option worth mentioning at this point however is **Default Toolbars**. Selecting this option will automatically restore the original toolbar settings – so if you do make changes you later wish to revert, it can be done with a single click.

Customise Toolbars dialog

To customise a toolbar, right-click on any toolbar and select **Customise Toolbar...** from the context menu. The following dialog will appear:



The left-hand side of the dialog shows the list of toolbars you can edit - Graph bar, Main bar, News bar and Settings bar. To begin, simply click on the toolbar you wish to customise.

Note that you can also create a new toolbar by clicking on the **Make new bar...** button underneath the list.

The main part of the dialog contains two tabs: **Settings**, which controls the general configuration of the toolbar; and **Buttons**, which allows you to select which buttons are included on each toolbar. We will look at each of these in turn:

Settings Tab

The Settings tab contains the following options:

Rename bar: allows you to rename the selected toolbar.

Delete bar: pressing this button will delete the currently selected toolbar.

Position bar: lets you select the positioning of the selected toolbar – i.e. the Top, Left, Right or Bottom of the screen.

As illustrated in the introduction, by default the Main toolbar is positioned at the top of the screen, the Settings toolbar at the bottom and the Graph/News toolbar on the right.

It is possible to add multiple toolbars in the same position. By default, subsequent toolbars will join onto the end of an existing toolbar and, if required, wrap onto the next line. If **Start on new line** is ticked the new toolbar will start on the next line – and not wrap.

Lock in Place disables the function that allows you to move toolbars by clicking and holding on the narrow bar to the left of the button and dragging as appropriate.

Buttons: buttons can consist of a combination of icons (pictures), text, keyboard shortcuts, colours and mnemonics (e.g. *Sh* for *Shares*).

Toolbar buttons can be displayed in three sizes – **Extra large**, **Large** or **Small**.

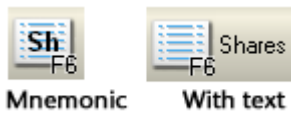
Show shortcuts displays the keyboard shortcut you can use instead of pressing the button on the toolbar (e.g. pressing F9 to update). Not all buttons have keyboard shortcuts, but you can add these at a later date via the **Keyboard accelerators** option on the toolbar context menu.

Icons: the options available under this heading allow you to set the extent to which icons (or pictures) appear on buttons. The example below shows the FTSE 100 button with and without an icon.



You can choose to **Show all icons**, **Show selected icons** or **Don't show icons**. The option **Show selected icons** lets you make changes on a per-button basis in conjunction with the [Buttons](#) tab.

There are also options to display the **mnemonic** of the button name, e.g. Sh = Shares as shown below:



Note: Mnemonics and colour flashes can only be applied to List, Portfolio and Settings buttons.

Text: the Text settings allow you to choose the level of text that is displayed on toolbar buttons.

To display the full name of each button select **Show all text**. Alternatively select **Don't show text** to hide the text.

The **Show selected text** option (as with **Show selected icons** above) lets you access the colour flashes and mnemonics options on a per-button basis in the tab.

Other text options let you; **increase** the size of the text; **wrap the text** within each button (to reduce the length of the toolbar); and to **fix the width of the button** (to maintain the format of the toolbar).

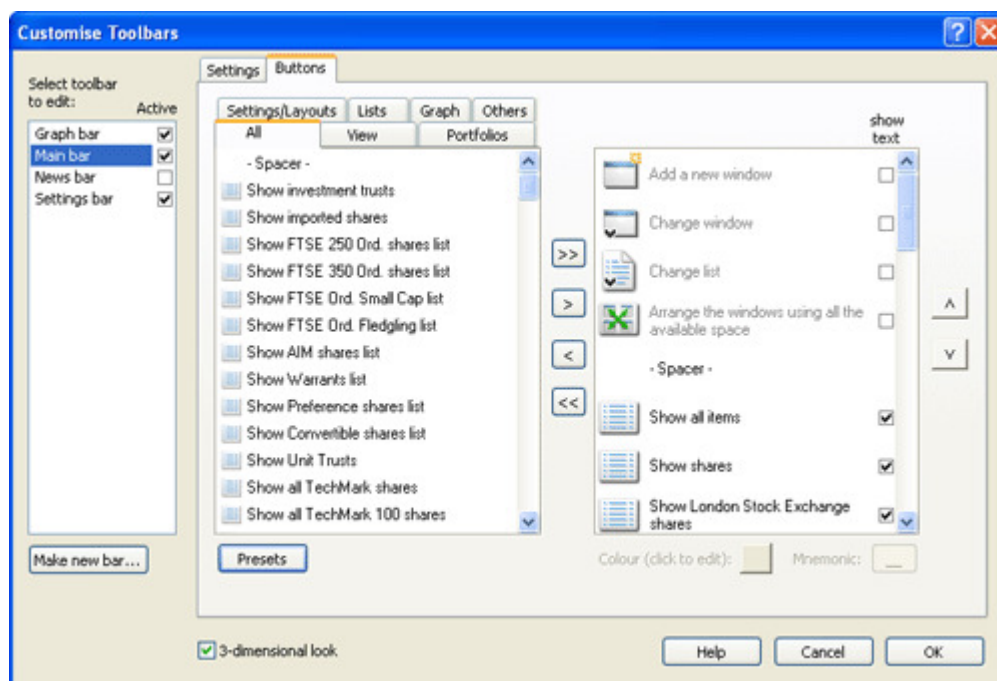
Visibility (ShareScope Gold only)

As ShareScope Gold has a single-window layout, the **Visibility** option allows you specify when each toolbar is displayed – in other words in which views it will appear. For example, you could create a new toolbar for moving average buttons and then restrict it to display in the Graph view only. To display the toolbar in all views, tick the **All views** option. By de-selecting all tick boxes you can remove a toolbar from the screen without deleting it.

Buttons tab

The Buttons tab lets you choose which buttons are included on each toolbar.

The Buttons tab is split into two windows. The left hand-side displays a list of buttons that can be added to the toolbar and the right, hand-side lists that are currently on the toolbar..



Above the left window, there are seven tabs to select from. The **All** tab lists all the toolbar buttons not already included on the selected toolbar. The other six options group together associated buttons – for example Graph and Portfolio buttons.

To add a button to a toolbar, first select the button you wish to add (in the left window) and then click on the **>** arrow. To remove a button from a toolbar, select it in the right-hand window and click on the **<** button.

Buttons may also be added by double clicking on the desired button.

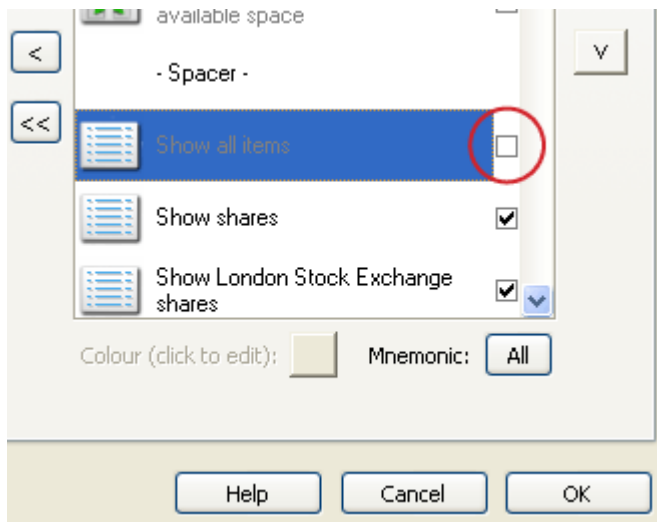
The **>>** and **<<** options will add or remove all the buttons in the list.

Having clicked either **>** or **>>**, you will notice that new button(s) add to the bottom of the list - and ultimately to the end of the toolbar. To change the order of buttons, select a button in the right-hand window and click on either the **up** or **down** button.

As mentioned earlier, it is possible to customise the appearance of individual buttons by selecting the **Show selected icons** and/or **Show selected text** options from the Settings tabs. Once you have selected one or both options, you will notice a new a new tickbox next to each button in the right-hand window. Unticking this tickbox, you will be able to access two additional options - **Colour** and **Mnemonic**. Clicking either will allow you to edit the colour flash and mnemonic associated with a selected button.

Note: ShareScope will not allow you to select certain combinations of icons, text, mnemonics and colour flashes if they are mutually exclusive.

For example, you will not be able to access the **Mnemonics** option if **Show All Text** is selected in the Setting tab.

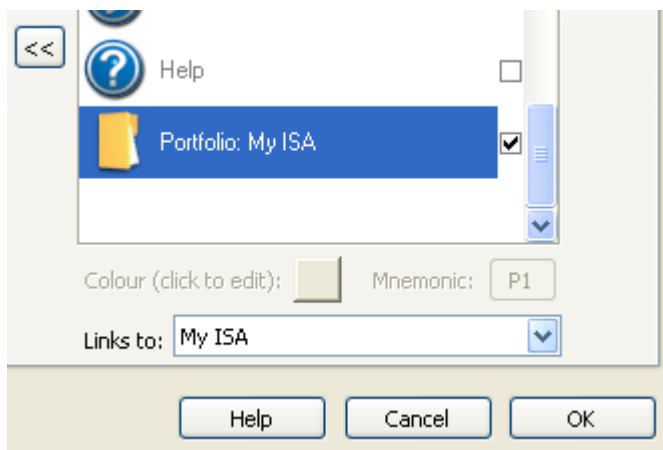


ShareScope includes a number of preset toolbar configurations which you can load and edit. You can access these by clicking on the **Presets**. This will replace the buttons currently selected for the active toolbar. If you decide that you don't want to use the preset buttons, click on **Cancel** and start again.

Portfolios

You can add buttons which link to specific portfolio in the **Customise Toolbars...** dialog.

If you add a Portfolio button (e.g. 'Portfolio 1') to a toolbar, you will notice a new **Links to...** drop-down menu appears just below the **Colour** and **Mnemonic** options.



This lists your portfolios and all of ShareScope's dynamic portfolios. Select the portfolio to which you want the toolbar button to link. You can change this association at any time.

The numbered portfolio buttons (1-9) can be assigned to specific portfolios. Once added to the right hand side of the dialog box, click on the button and then select the portfolio to attach it to using the **Links to:** option. Clicking on a portfolio toolbar button will then display that portfolio.

Remember, if you have any trouble finding or using any of these features, please don't hesitate to call our Customer Support team. They will be delighted to help.

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