

Tips and Techniques Newsletter

Three CSI SyteLine Tricks You'll Love Trick #2

This is the second in our series of "Three CSI SyteLine Tricks You'll Love".

Just to reiterate: if you've been using CloudSuite Industrial/SyteLine 9 or 10 for some time you probably think you know all the tricks of the User Interface. Here's a few that you may already know, but if not these can make your life easier.

The three tricks are:

- Date Lookup by Partial Match
- Changing your Menu Theme for a more useful menu
- Pressing buttons without the mouse

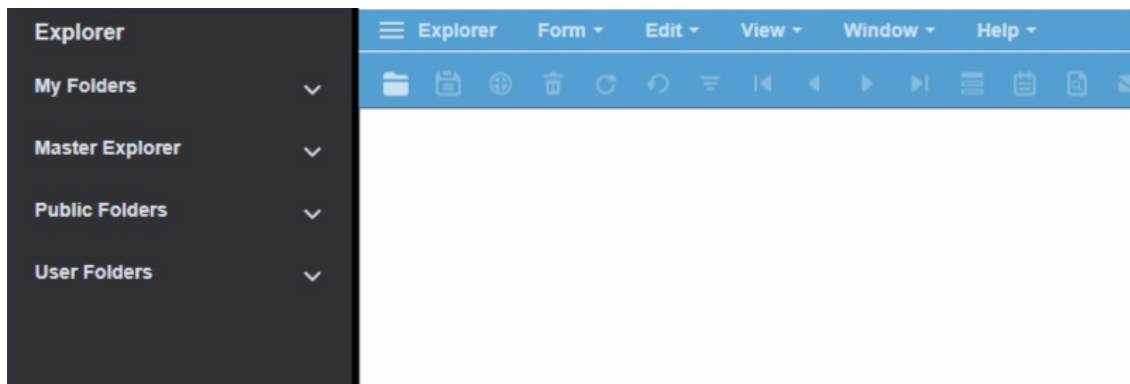
If you missed last week's tip - Date Lookup by Partial Match, just click the link below to send me an email. I will send you the tip you missed.

[Request](#)

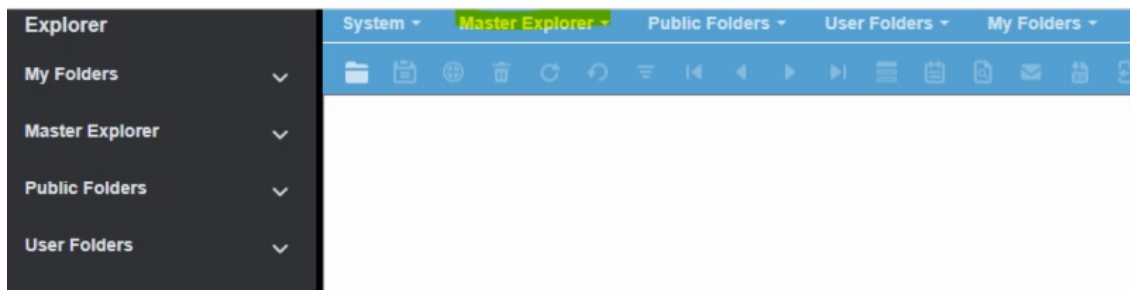
This week's Trick is:

Changing Your Menu Theme for a More Useful Menu.

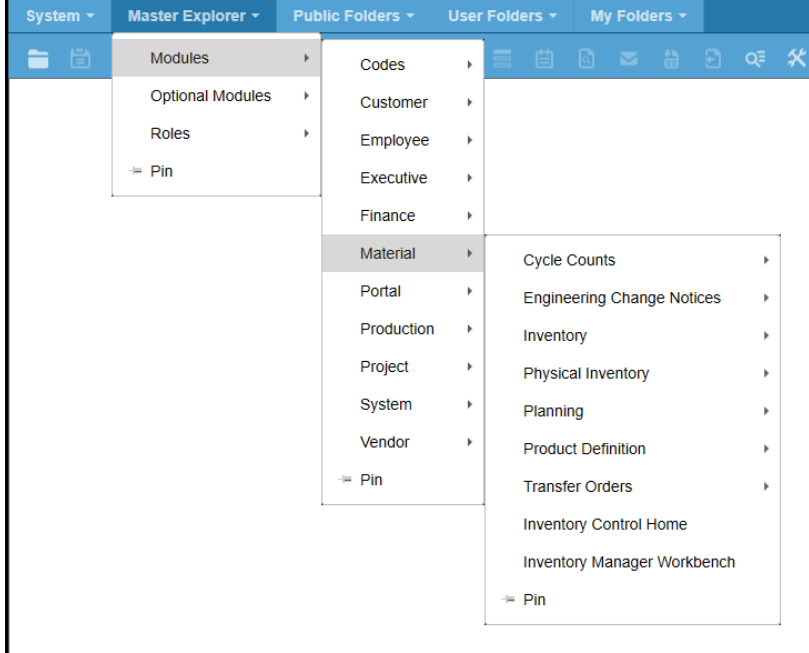
Out of the box CSI/SyteLine has its Explorer style set to "Classic". This gives you a menu that looks like this:



However, there is another Explorer style that gives you considerably more navigation power, called the "Menu" style. It exposes another Menu selection called Master Explorer, which looks like this:

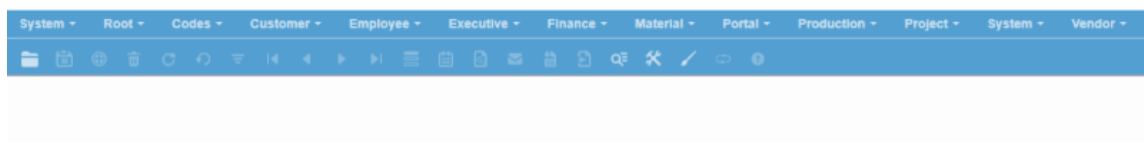


The Master Explorer gives you much faster access to all the modules and screens:

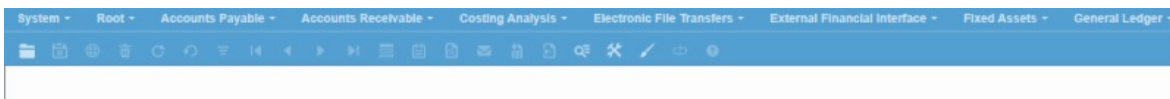


But most importantly, notice the "Pin" [↑] on the bottom of each drop down menu.

Clicking that pin will move those menu items to the top horizontal menu on your screen. Below I've "pinned" the modules menu to my top menu:

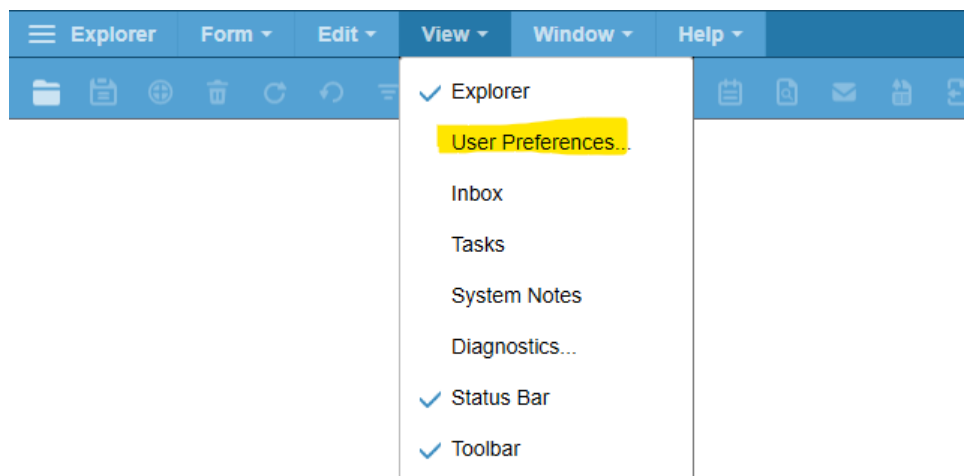


From here you can quickly navigate to any area of the system. Or if you work in a specific department, such as accounting, you can pin the Finance menu as shown below:

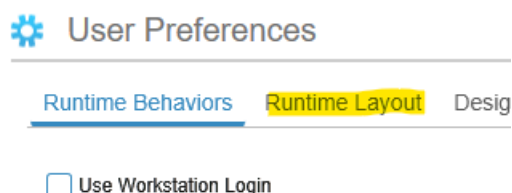


The way you choose this menu style is buried under a couple of layers deep, which is why most people don't know about it. To enable this menu:

1) Select View → User Preferences



2) Select the "Runtime Layout" tab on the User Preferences form:



3) If you don't currently have a theme selected on the Runtime Layout, pick one. I suggest the "Classic" theme to start. Then click the "Edit" button next to the Theme:

User Preferences

Runtime Behaviors **Runtime Layout** Design Tin

Theme:

- Classic
- EmployeeSelfService
- Infor
- Light
- Projector

4) On the Theme Editor form, click the "Options" tab:

Theme Editor

Styles **Options**

5) On the Options tab, select the "Menu" Explorer Style:

Theme Editor

Styles **Options**

Explorer Style:

- Classic
- Menu

Required Field Indicator:

That's it. Click the OK button at the bottom of the Theme Editor and you're good to go!

Keep an eye out next week for Tip #3: Pressing Buttons Without the Mouse.

If you have any questions regarding your CSI (SyteLine) System, do not hesitate to give us a call. Your success is very important to us.

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