



# Evolution M

## Core Training

### Basic Functionality

Issue 1

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## Basic Functionality

This document covers some of the general system functionality used for training of the various personnel which will use the Evolution M accounting system.

### Accessing Evolution M

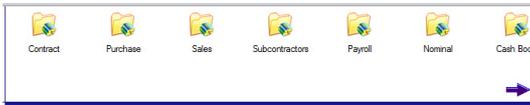
1. Click **Start > Evolution M Client**. The **Evolution M Login** window is displayed.

The image shows a login dialog box with the following fields: 'User ID' (containing 'TP'), 'Password', 'Company' (a dropdown menu), and another 'Password' field. At the bottom are 'OK' and 'Cancel' buttons.

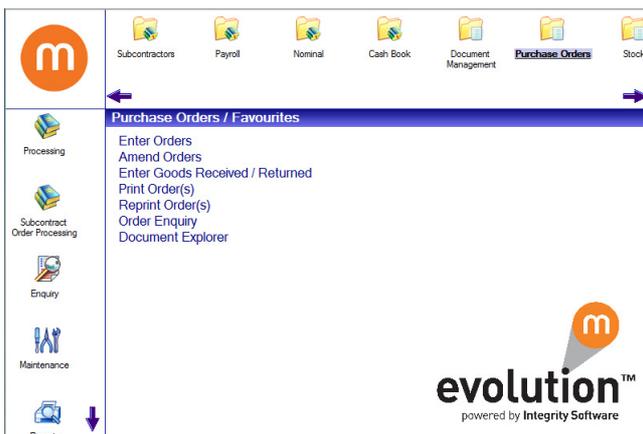
2. Enter your **User ID** and **Password**. These details will be provided by your system administrator.
3. Press Enter or click **OK**.
4. Select the required **Company** (there may be multiple Companies for your system) and, if required, enter the **Password** for access to the Company. Again, these details have been provided.
5. Press Enter or click **OK**. The **Evolution M** application is displayed.

### Menu Structure

The top pane of the application window contains the modules.



1. Click on a module to select. Click on the arrow at the bottom-right of the pane to scroll through the modules.
2. Once a module is selected e.g. Purchase Orders, the tools within the module are displayed in the left-hand side pane and the Favourite programs are displayed in the main window.



3. If the desired program is not in Favourites, click a tool in the left pane to view the list of programs within that tool. E.g. If you are looking to process a Purchase Order, click **Processing** and then select **Enter Orders** from the list to open the program used for entering Purchase Orders.

Notes

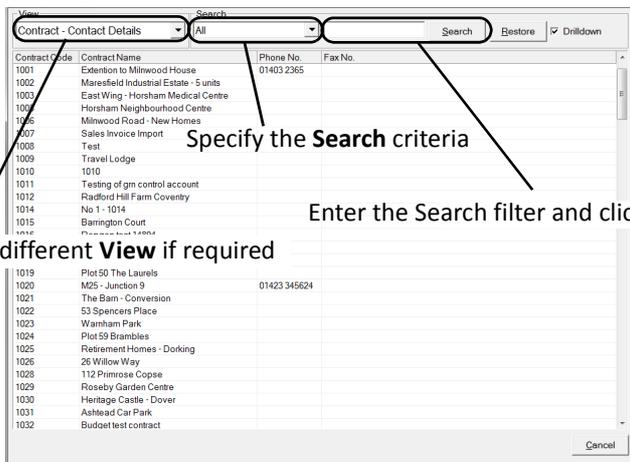
### Use of the Tab Key

The Tab key on your keyboard can be used for moving the cursor to the next available field in a program, for ease of inputting data.

It can also be used for retrieving details of an existing record, by entering the code and pressing the Tab key in the field (in Enquiry or Maintenance), thereby eliminating the need of using the search drop-down (see 'Search Drop-Down' topic below).

### Search by 'Drop-Down' or F4 Key

Records (e.g. accounts) can be searched in programs by clicking the Search 'Drop-Down' icon  to the right of the field, or by pressing the F4 key with the cursor inside the field. Various search criteria can be specified in the search dialogue and all the records which meet the criteria will be displayed. Double-click on the required record to enter the code into the field.



### Notes

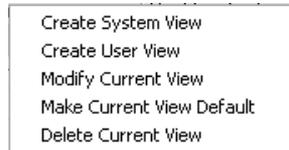
### Use of the F12 Key

In many posting routines it is quite common to post several transactions in a batch to the same code, perhaps, for example, if all of a supplier's invoices have been grouped together, or if a Quantity Surveyor has passed back several invoices for the same contract. In these instances, pressing the F12 key will remember the last characters keyed in a particular field to reduce input. This only applies to postings in the same batch.

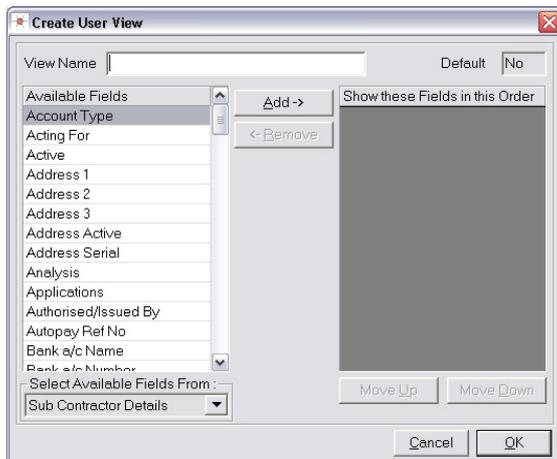
## Generating User Views

Note that this functionality is not available to all Users.

1. Custom views are set up by right-clicking on any column heading in an Enquiry view. You will then be presented with the following menu options, provided that you have the permissions.



2. Select either the 'Create System View' (available for all Users) or 'Create User View' (available for just you) option and the following dialogue will be displayed.

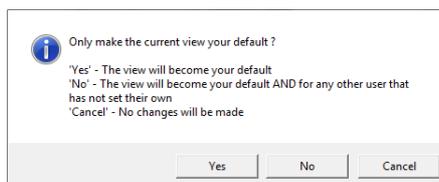


3. The **View Name** is the name that will be seen by the user in the views list.
4. On the left there is a list of available fields. Underneath that is a list of tables that you can pick views from. Where there is only one possible table, this box will be greyed out.
5. To select a field to incorporate in your view, double-click on the field and it will move over to the right hand side of the screen.
6. The fields can be sorted by selecting a field and clicking the **Move Up** and **Move Down** buttons.
7. Once you are happy with the view, click **OK** and the view will be added to the view list.

### Set a Default View

You can specify which view you or all users see as a default. This overrides the Evolution M default view.

1. Once a view is selected in Enquiry, right-click anywhere on the column headings of the view you wish to have as default and click 'Make Current View Default'. The following message is displayed.



Notes

## Basic Functionality

- Click **Yes** to make the view a default for you only, **No** to make it a default view for you and any other user which has not set their own default, or **Cancel** to not make this view a default.

### Exporting Data to Excel

Data can be exported to Microsoft Excel from Enquiry screens and reports.

#### Exporting from an Enquiry Screen

Cost Head Group	Total Ordered	Committed Val.	Order Value O/S	Delivered Val.	Delivered O/S Value	Orders O/S
Extension to Milnwood House						
Labour	1,612.00	34,507.97	1,597.00	15.00	(11.60)	1,585.40
Sub-Con LO	25,275.00	25,295.00	25,275.00	0.00	0.00	25,275.00
Sub-Con SF	1,414,792.00	1,735,466.75	1,398,530.00	16,262.00	125.00	1,398,655.00
Materials	144,751,097.20	145,036,404.72	144,663,858.28	87,238.92	42,989.73	144,706,848.01
Internal Plant	0.00	5,663.12	0.00	0.00	0.00	0.00
External Plant	0.00	12,948.98	0.00	0.00	0.00	0.00

- Access the required record and screen in Enquiry.
- Right-click in the table grid.
- Select the **Copy to Excel** option from the menu. The system extracts the data in the grid and exports it into Excel.

	A	B	C	D	E	F	G	H	I	J
1	Cost Head Group	Total Ordered	Committed Val.	Order Value O/S	Delivered Val.	Delivered O/S Value	Delivered + Orders O/S	Invoiced Value	rescominval	Actual Cost
2	Extension to Milnwood House									
3	Labour	1,612.00	34,507.97	1,597.00	15.00	-11.60	1,585.40	2,376.00	3,961.40	32,910.97
4	Sub-Con LO	25,275.00	25,295.00	25,275.00	0.00	0.00	25,275.00	0.00	25,275.00	20.00
5	Sub-Con SF	1,414,792.00	1,735,466.75	1,398,530.00	16,262.00	125.00	1,398,655.00	16,344.50	1,414,999.50	336,936.75
6	Materials	144,751,097.20	145,036,404.72	144,663,858.28	87,238.92	42,989.73	144,706,848.01	29,715.74	144,736,563.75	372,546.44
7	Internal Plant	0.00	5,663.12	0.00	0.00	0.00	0.00	0.00	0.00	5,663.12
8	External Plant	0.00	12,948.98	0.00	0.00	0.00	0.00	0.00	0.00	12,948.98

- The Excel file can be formatted, and printed and/or saved if required.

#### Exporting from a Report

- Generate a report.
- In the Print Preview, click the **Excel** button at the bottom of the preview. The data in the report is exported into Excel and can be formatted, and printed and/or saved if required.

Notes

**Head Office**

Integrity Software Systems Ltd

Mere Park

Dedmere Road

Marlow

Buckinghamshire

SL7 1PB

**T** +44 (0)1628 488900

**F** +44 (0)1628 488940

**W** [www.integrity-software.net](http://www.integrity-software.net)

**Support**

**T** +44 (0)1522 887200

**E** [support@integrity-software.net](mailto:support@integrity-software.net)