



**akuiteo**  
BUSINESS SOFTWARE

User Guide

# INTERFACE

Version 4.6

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# 1 Preface

## 1.1 REVISIONS

<b>Revision 2</b>	Published in January 2022 <ul style="list-style-type: none"><li>• Added details about <a href="#">Date fields</a> (p. 12).</li></ul>
<b>Revision 1</b>	Published in November 2021

## 1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

## 2 The Home page

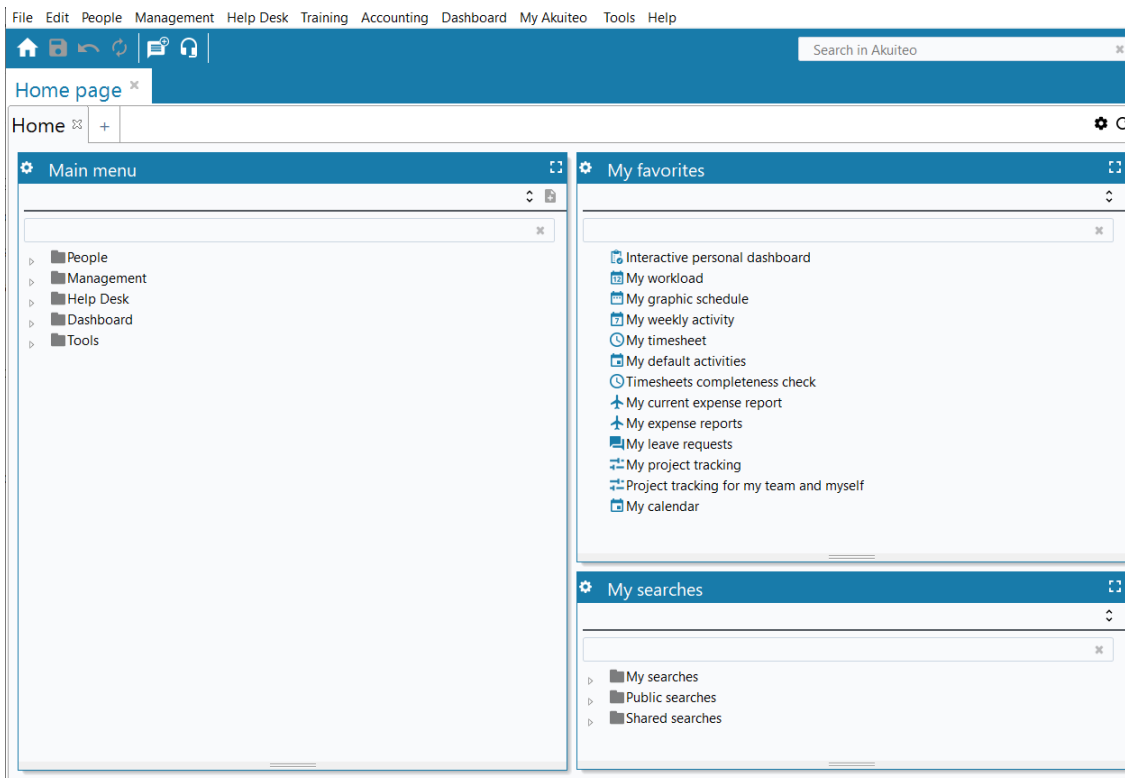
Once you log into Akuiteo, you directly access the **Home page** tab.

### 2.1 MENU AND MY FAVORITES

The following elements are available in the **Menu**, on the left:

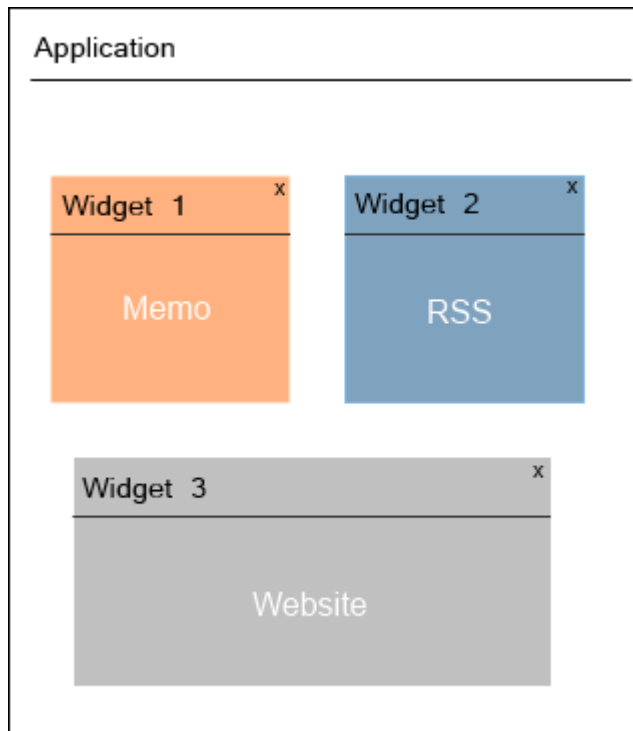
- a search field located above the folders to help you quickly find an element.
- a list of default folders referring to entries in the top menu.

In **My favorites**, on the right, a space enables you to set up shortcuts to additional features.



### 2.2 WIDGETS

A widget (i.e. windows + gadget) is a graphical tool used to display information directly from Akuiteo's home page.



You can indicate the type of widgets to display.

Type of widgets	Displays...
Main menu	most of the menu entries displayed as folders.
My favorites	access to shortcuts.
My searches	direct access to your custom searches.
Browser	the web browser of your choice.
Graph	search results saved in graph interface.
Notepad	reminders for tasks, events, etc.
Reading of RSS feed	a previously defined RSS feed.
Printing of overview	an overview of data of your choice based on a report template.
Login to Customer Portal	the content of the Customer Portal in a web browser.
Login to the Akuiteo Employees / Manager portal (Web Portal)	the content of the Web Portal.

### 2.2.1 Activating a widget

By default, widgets are not displayed. To activate them:

- 1 Open a user record sheet from **People > User management**, and search for a user.
- 2 Check the **Show user home page** option and save.
- 3 Log out and restart Akuiteo.

## 2.2.2 Creating a widget

When starting Akuiteo, under the **Home** tab, right-click on the empty zone.

- 1 Select **Add a gadget...**
- 2 In the **Addition of a gadget** window:
  - select the type of widget to add.
  - name the window containing the widget.
  - set the widget's height if you want to insert several widgets.
  - customize the color of the widget's border or content.
- 3 If you select **Browser** or **Reading of RSS feed**, enter the web page's URL or the RSS feed.
- 4 For widgets with the **Graph** or **Printing of overview** types, it is possible to enter a **Refresh frequency (in minutes)** to automatically update the widget's data every X minutes.
- 5 If you select **Printing of overview**, select the report template to use. Report templates are available in Akuiteo's installation directory under \Packages\Modeles.

### Note

When setting up a summary report from **Tools > Setup > Reports setup > Shared**, check **Force printing in a widget** to automatically display that report on your home page.

## 2.2.3 Customizing a widget

To customize the content of widgets based on your needs:

- 1 Click on the cogwheel in the upper left side of the widget.
- 2 Select your preferences in the setup window.
- 3 If you want to set up a search list, select the radio buttons that enable you to group your lists in different ways (per folder, per list, and so on).

### Note

If you select **No** at **Rank the results**, all saved searches will be displayed on the "same level", with no hierarchy.

## 2.2.4 Deleting a widget

To delete a widget:

- 1 Click on the cogwheel at the top left of the widget.
- 2 Click on **Delete**.

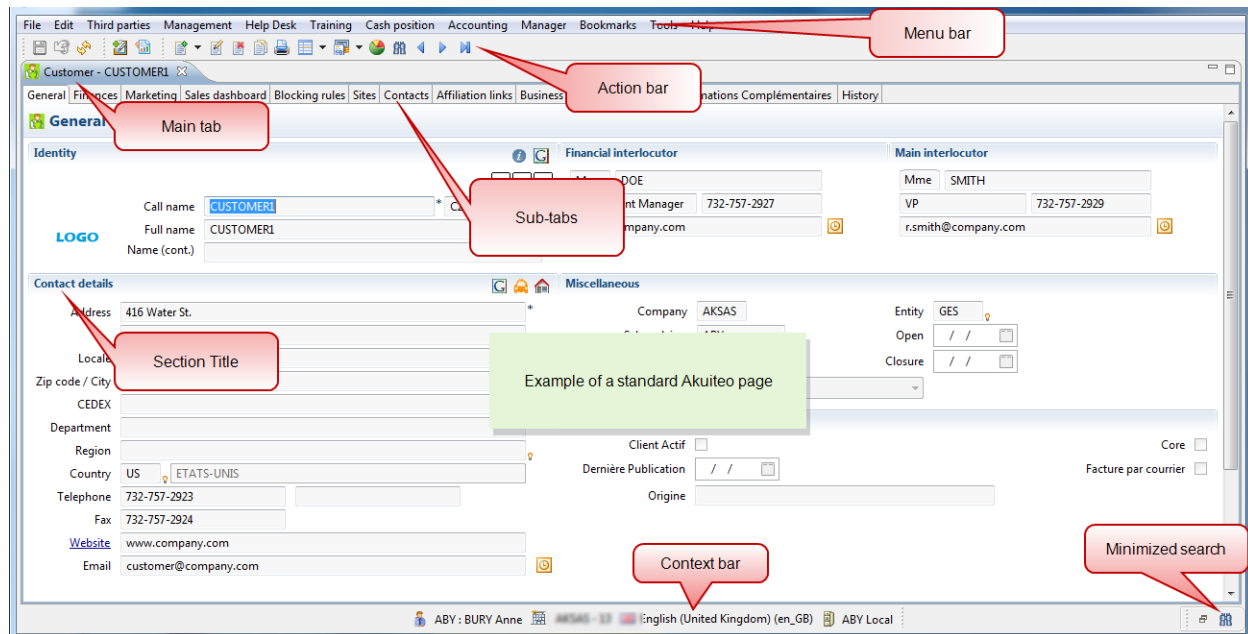
The tab remains active but is empty.

Click on the cross at the top right of the tab to close it.



# 3 The working screen area

As illustrated in the picture below, the working screen area contains several elements:



## Menu bar

Located at the top of the Desktop window, the menu bar gives you access to all the modules available in Akuiteo.

You can find these modules in the **Main menu** widget of the home page. It enables you to quickly access all features.

"Standard" menus such as **File**, **Edit** and **Help** are also available. They allow you to save your objects, create new invoices or access the online help.

Note that the content in the **Edit** menu varies depending on the screen displayed to better suit your specific needs.

## Action bar

Under the menu bar, the action bar gives you a quick access to the main features available in the various modules (save, search, update, etc.) as well as to specific icons depending on the screen displayed.

## Tabs and sub-tabs

Each screen (search, display, modification, etc.) can be accessed via a tab. To switch between screens, you just have to click on the relevant tab.

To quickly close tabs, right-click on a tab and select:

- **Close**, to close the active tab
- **Close other results**, to close all tabs at once, except for the active one.
- **Close all**, to close all tabs.

From the **File > Close tabs that are not being changed** menu, you can also close displayed tabs all at once to only keep open tabs that are being modified.

## Screen

It is located in the middle of the main working screen area. The screen contains all the information about a record in the Desktop. The title on the screen can be different from the one indicated on the tab or sub-tab and can contain additional information (e.g. project state). Each screen or record is unique and represents one data. Therefore, you cannot open two identical screens at the same time. (e.g. Doe customer's record sheet).

## Section title

Sections are the most detailed elements in the Desktop. Their title is written in gray and can be found at the top left of each section. Each section contains a set of information. The user enters data in these sections.

## Context bar

It is located at the bottom of the window and displays information about the current session's context, such as the connected user, the company, the interface's language or the server's name.


Click on the building icon to modify the **Legal entity** to know and/or change the company and the entity; the **Accounting period** to know and/or change the accounting time period; the **Journals** to indicate the different journals to use.

This icon also enables you to set another **Work date**. The new date will therefore be taken into account when:

- Creating sales quotations, orders, deliveries, billing tables, invoices and customer credit notes,
- Creating purchase quotes, orders, receptions, billing tables, invoices and supplier credit notes,
- Receiving subcontracting purchase orders,
- Receiving orders and order deliveries,
- Reviewing and canceling sales and purchase orders,
- Dealing with payment receipts and disbursements.

A text in red displayed in the status bar below will help you know, at any time, the date taken into account.

## Minimized search

It is available at the bottom right of the Desktop. When you start a search, the results can be accessed from the bar. As such, you can quickly retrieve your previous searches by clicking on the  icon.

- Hover over the icon to display the searched objects.
- You can remove it by right-clicking on the icon. There are as many search icons as there are searches.

# 4 Search and display

You can quickly find information in your company's database thanks to Akuiteo's search engine.

When you open a menu for example, search and display screens are the first screens you see.

By default, these screens are empty when you display them.

## 4.1 SEARCH

In this type of screen, the user must enter information to start a search. These screens give a direct access to the searched pages.

### 4.1.1 Opening search screens

Let's start a customer search for example. From the menu bar, go to **People > Customers/Prospects** to open the search screen.

The screenshot shows the 'Find Customer' search interface. It features a menu bar at the top with options like File, Edit, Third parties, Management, Help Desk, Training, Cash position, Accounting, Manager, Bookmarks, Tools, and Help. Below the menu bar is a toolbar with various icons. The main area is divided into several sections: 'Main criteria' (with sub-tabs for 'Main criteria', 'Additional criteria', and 'Informations Complémentaires'), 'Activity', and 'Location'. The 'Main criteria' section includes fields for 'Call name', 'Code', 'Type' (with radio buttons for 'Customers' and 'Prospects'), 'Multi-field search', and 'Control account between'. The 'Activity' section includes 'Division' and 'Entity' fields. The 'Location' section includes 'Zip code', 'City', 'Department', 'Region', 'Country', 'Sales mgr.', 'Account manager', and 'Contact name'. Annotations with red speech bubbles point to specific elements: 'Additional tabs' points to the 'Additional criteria' tab; 'Input field' points to the 'Call name' field; 'Field with help list' points to the 'Division' field; 'By default, the screen is empty when it opens' is a green box covering the main search area; and 'Field not modifiable' points to the 'Region' field.

Additional tabs enable you to add specific information to your search.

There are several types of fields:

#### Free-form fields

Free-form fields are input boxes where the user can enter text. Their default color is white but they turn blue when they are active.

## Non-modifiable fields

Some object fields cannot be modified. They can only be filled in when creating an object. These fields are always shaded.

## Fields generated from a help list

You can set up help lists to use them later:

FL	ILES FALKLAND (MALVINAS)	AMERI
FO	ILES FEROE	EUROP
FR	FRANCE	CE
GA	GABON	AFRIQ
GB	ROYAUME-UNI	CE
GD	GRENADE	AMERI
GE	GEORGIE	AS.C
GF	GUYANE FRANÇAISE	AMERI
GH	GHANA	AFRIQ
GI	GIBRALTAR	EUROP
GL	GROENLAND	AMERI
GM	GAMBIE	AFRIQ
GN	GUINEE	AFRIQ
GP	GUADELOUPE	AMERI
GQ	GUINEE EQUATORIALE	AFRIQ
GR	GRECE	CE
GT	GUATEMALA	AM.S

To use these lists from a search screen:


- search for light-orange input fields. These fields become yellow when they are active and can be identified by a small bulb icon.
- use a special character, like ?. This character can be modified in the user preferences.
- if you want to filter a help list, you can enter part of your search with the "?" character. e.g. 2244? or ?2445 or 22?45 or ?244? for a list of ZIP codes. You can also filter the data containing a value such as ?marc?, for example.
- use the **Enter**, **Tab** or **F2** keys to display the help list.

If a table is displayed below a field with a help list, it means it is a multiple-criteria field that enables you to select multiple lines:

- press and hold the **Ctrl** key when selecting data, then press **Enter**.

The lines are displayed in the table.

## Date fields

To enter date-type fields, click on  to select the desired date from the calendar.

The date can also be manually entered, with 2, 4, 6 or 8 numbers:

2 numbers	The 2 numbers entered define the day. The current month and year are automatically filled in.
4 numbers	The 4 numbers entered define the day and month. The current year is automatically filled in.
6 numbers	The 6 numbers entered define the day, the month and the last 2 digits of the year. The year is automatically filled in.
8 numbers	The 8 numbers entered define the full date.

## Note

Dates can be entered with or without the "/" separator.

The following shortcuts can also be used to enter the date:

- With the cursor in the empty field, press the top arrow (or move the mouse wheel upward) to fill in tomorrow's date.
- With the cursor in the empty field, press the down arrow (or move the mouse wheel downward) to fill in today's date.
- When a date is already entered, put the cursor on the day, month or year then press the top or down arrow (or move the mouse wheel upward or downward) to add or remove a unit.
- Enter directly **yesterday**, **today** and **tomorrow** to respectively enter yesterday's, today's and tomorrow's dates.

## Hyperlinks

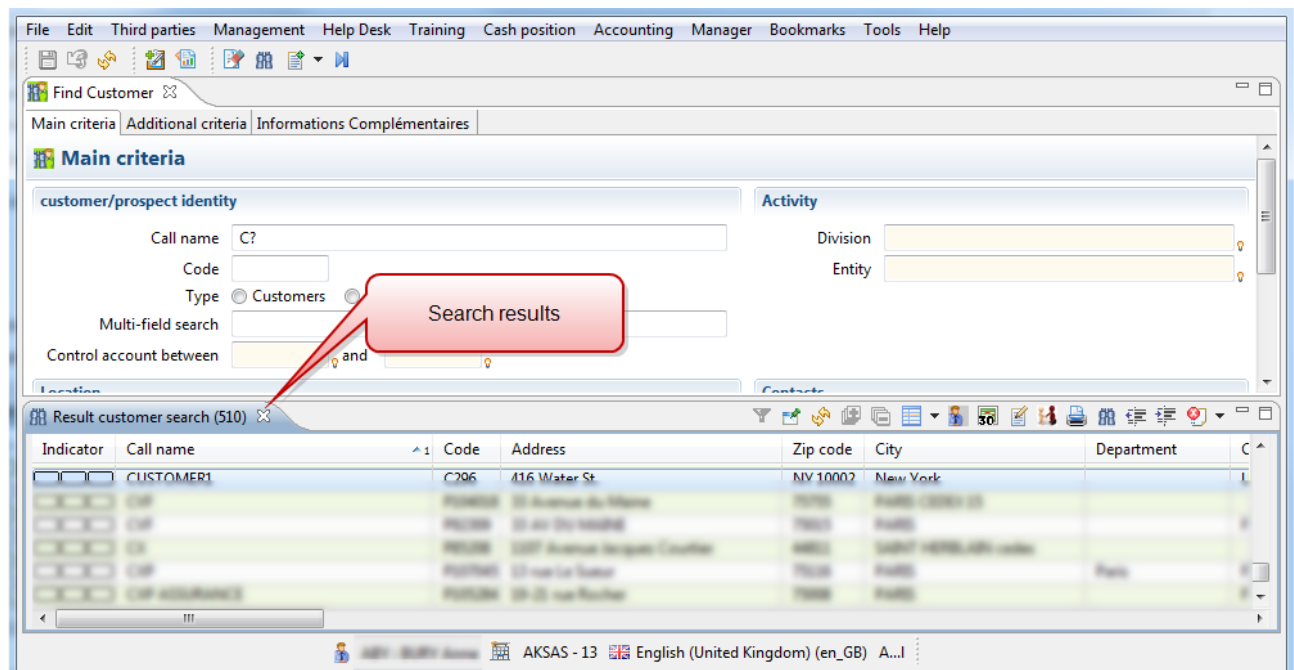
These links allows you to access the [highlighted](#) object without closing the displayed screen. They allow you to:

- open an object's record sheet in a new tab (e.g. the customer module),
- open a web page in a new tab (e.g. a customer's website),
- open a window (e.g. a project code).

### 4.1.2 Starting the search

You want to retrieve the list of customers starting with the letter C:

- 1 In the **Call name** field, enter **C?**, then press **Enter**. A list with several results is displayed.
- 2 In this list, double-click on the relevant line to open the customer's record sheet.




## Note

If there is only one result matching, the searched screen is automatically displayed.

### 4.1.3 Analyzing results using graphs

#### Creating graphs

- 1 From the search results, click on  in the action bar to switch to graph mode.
- 2 In the window, fill in the following fields to define the graph data:



Field	Description
<b>Measure</b>	<p>Select the value to be measured from the drop-down list. This list contains all the columns available in the search results, including custom data.</p> <div><p><b>Example</b></p><p>You want to measure the pre-tax amount billed for the year 2018, on a month-to-month basis.</p><p>From the invoices search results (from 01/01/2018 to 12/31/2018), you switch to graph mode. In the <b>Measure</b> field, you select <b>Subtotal EUR</b>.</p></div>
<b>Operation</b>	<p>From the drop-down list, select the arithmetic operation to apply to the measured values — the values of the column selected in <b>Measure</b>.</p> <p>The following operations are only available for numeric values:</p> <ul style="list-style-type: none"><li>• <b>Sum</b>: sum of all column values.</li><li>• <b>Average</b>: average value of all column values.</li><li>• <b>Maximum</b>: maximum value among all column values.</li><li>• <b>Minimum</b>: minimum value among all column values.</li><li>• <b>Sum HH:MM</b>: sum in hours and minutes.</li></ul> <p>The following operations are available for numeric and non-numeric values:</p> <ul style="list-style-type: none"><li>• <b>Number of values</b>: counts the number of values in the column.</li><li>• <b>Number of different values</b>: counts the number of different values in the column. For example, if the same product category is found six times in the measured values, it will only be counted as one occurrence.</li></ul> <div><p><b>Example</b></p><p>You want to measure the pre-tax amount billed for the year 2018, on a month-to-month basis. In the <b>Operation</b> field, select <b>Sum</b> to add up all pre-tax amounts in invoices.</p></div>
<b>In thousands</b>	<p>If this box is checked, the measured values are displayed in thousands (rounded to the nearest thousand).</p>
<b>By</b>	<p>From the drop-down list, select the measure to compare with the previous one. This list contains</p>


Field	Description
	<p>all the columns available in the search results, including custom data.</p> <p>If the selected column has a "date" format, the <b>Grouping</b> field is displayed to indicate the date format.</p> <div> <p><b>Example</b></p> <p>You want to measure the pre-tax amount billed for the year 2018, on a month-to-month basis. Select <b>Date</b> in the <b>By</b> field.</p> </div>
<b>Grouping</b>	<p>The grouping only displays if the column selected in the <b>By</b> field has a "date" format.</p> <p>Select the date format in the drop-down list — <b>Date time</b> or <b>Week of the year</b>, for example.</p> <div> <p><b>Example</b></p> <p>You want to measure the pre-tax amount billed for the year 2018, on a month-to-month basis. In the <b>Grouping</b> field, select <b>Month of the year</b> to categorize measured values according to the months of the year 2018.</p> </div>
<b>Graph title</b>	Fill in the graph title. A title is automatically displayed with the information selected for the graph. This title can be modified.
<b>Graph</b>	<p>Click on an icon to define the type of graph to use. In Akuiteo, a graph can be displayed in four ways:</p> <ul style="list-style-type: none"> <li>• Line chart</li> <li>• Bar graph</li> <li>• Pie chart</li> <li>• Indicator (displays data as counters)</li> </ul>

### 3 Click on **Validate**.

↳ Data selected from the search results are displayed as a graph.

## Managing graphs

From the results in graph mode, click on  to switch back to table mode. Similarly, click on  from the results in table mode to switch to graph mode.

Click on  to open the **Graph** window. The fields are filled in with the graph's current values. You can change these values and click on **Validate** to directly update the graph and the measured data.

Click on  to export the graph. Three options are available:

- **Save as:** to save the graph on your computer in .png format.
- **Copy image:** to copy the graph to the clipboard in .png format.
- **Print:** to print the graph.

### Tip

From all graph types, click on a measure to open a new window with a table including all information about the data.

For example, from a bar graph, click on one of the bars to open the associated search results in a new window.

### Note

Results from a saved searched can be saved in graph mode in order to directly display the results in a graphic form when the search is launched. This type of saved search can also be added as a widget on the home page.

## 4.1.4 Closing the search

Magnifying glass icons are displayed at the bottom right of the screen. These are shortcuts to search results.

There are several ways to close search results:

- Right-click on a magnifying glass and click on **Close**.
- Click on the cross in the search tab.
- Right-click on a tab's cross to close all the results or other search results.

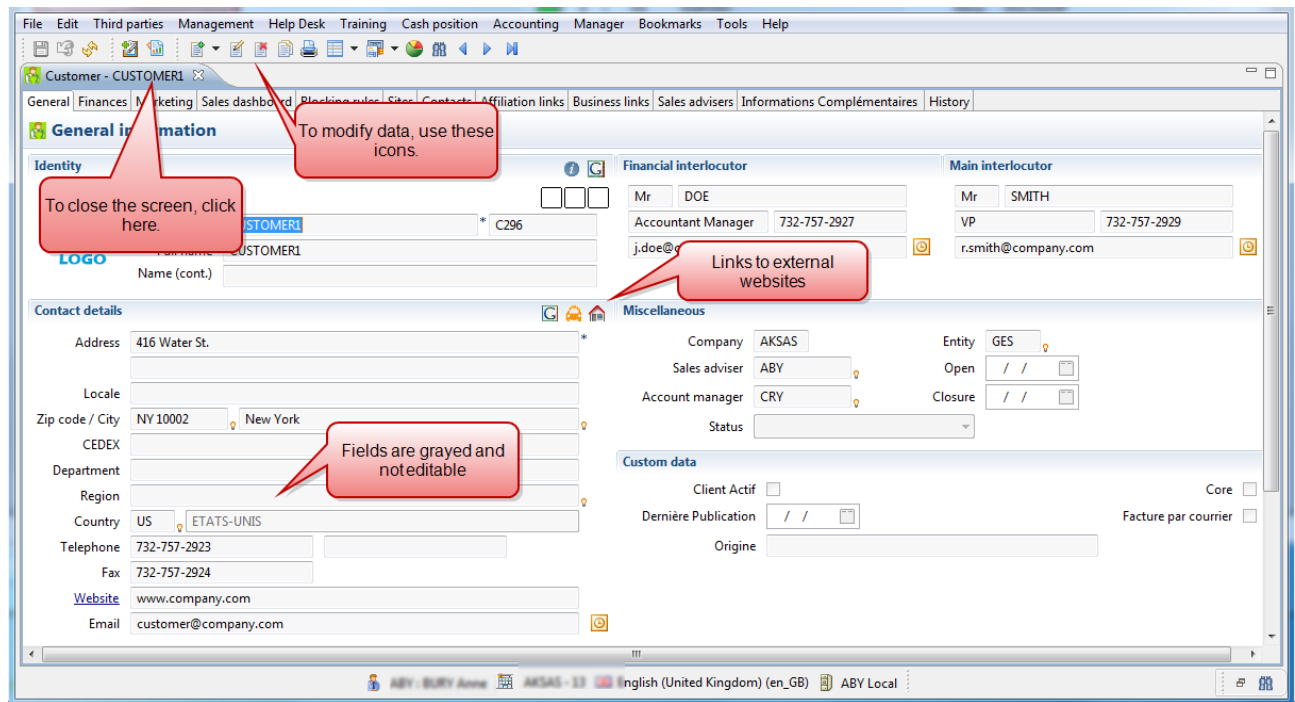
It is recommended to avoid opening several searches at the same time to prevent slowing down Akuiteo's performance.

## 4.2 DISPLAY

A display screen can be accessed after a search. You can notice the following elements:

- Fields are shaded and cannot be modified.
- You can click on social media icons or on interactive maps to display further information about your customer.
- Icons are available in the menu bar to allow you to modify the record or create a new one at anytime.
- To close a display screen, you just have to click on the cross in the screen tab or right-click to close several screens in a row.

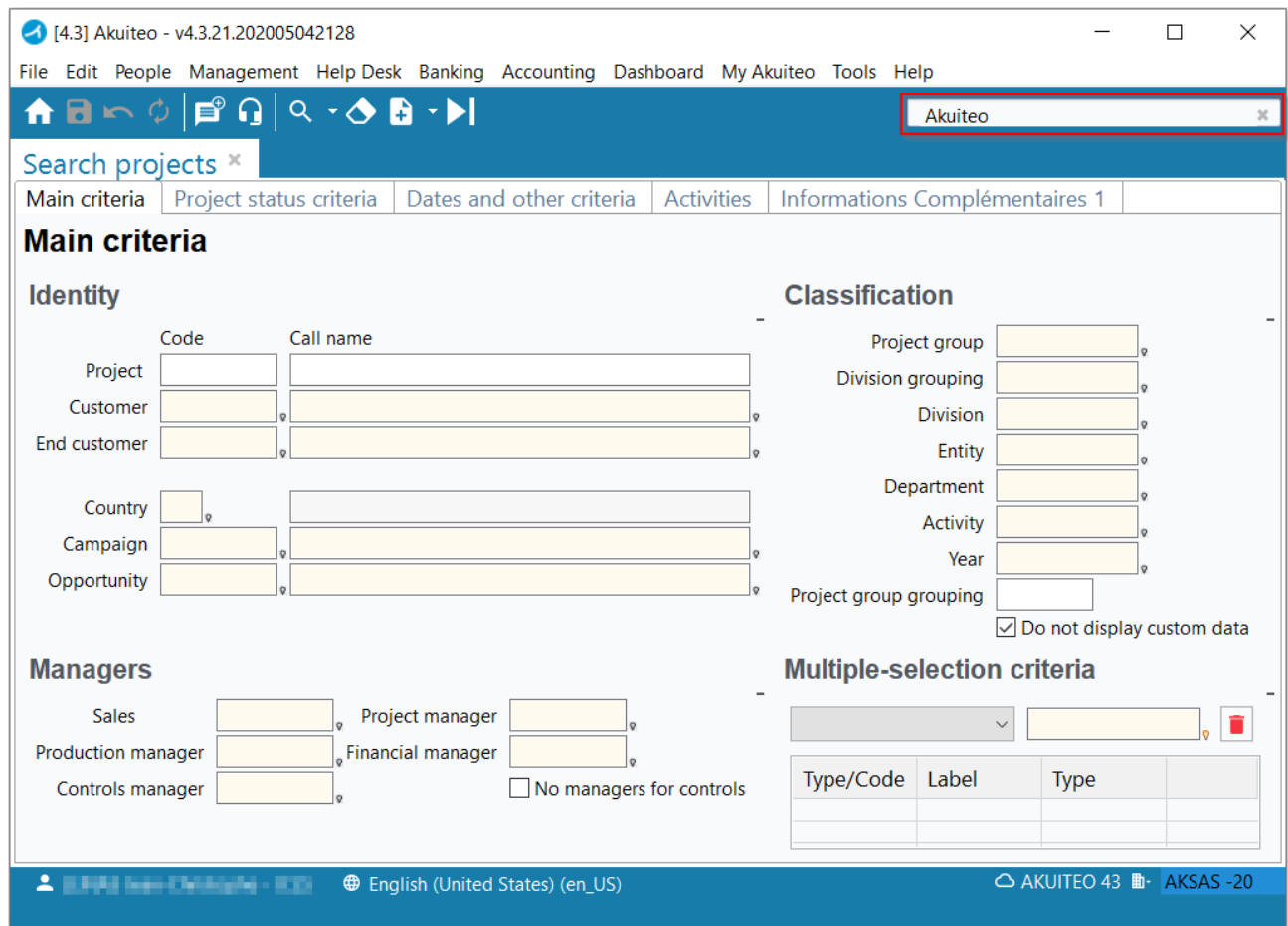




## 4.3 INTRODUCING AKUITEO SEARCH

Akuiteo provides an indexing tool that allows you to search for data within your ERP software.

All you need to do is to type your search in the relevant field to get the list of management objects and documents linked to your search.



## Types of files that can be indexed

In addition to akuiteo objects, you can index the following documents:

- HTML, HTM
- XML
- TXT
- RTF
- PDF
- DOC, DOT, DOCX, DOCM,
- ODT, ODS, ODP, ODG
- XLS, XLT, XLA, XLSX, XLSM, XLTM
- PPS, PPT, POT, PPA
- PPTX, POTX, PPSX, PPTM, POTM, PPSM
- SQL

## 4.4 USING AKUITEO SEARCH

### From all Akuiteo screens

- 1 Enter text in the Application Desktop's search field, at the top right of the screen.

- 2** Press **Enter**. The list of management objects, documents or any other indexed elements is displayed.
- 3** Click on the entries on the left to filter the content according to your selection. These categories of objects on which you can click enable you to filter the view on the right. After clicking on **Akuiteo Objects**, you notice that you can click on **Type** then **Document**.
- 4** Double-click on the element to open.

**Reminder:** results are filtered according to users' access rights (DMF).

#### **From the New issue screen**

- 1** Go to **Help Desk > New issue**.
- 2** In the **New quick issue** field, enter the element to search for among the following ones:
  - Customer
  - Contact
  - Contract
  - Product
  - Site

# 5 My custom searches

You can create and save 'custom searches', i.e. a type of search that includes specific criteria accessible from the home page.

## 5.1 CREATING A CUSTOM SEARCH


- 1 Open a search page (for example Customers / Prospects) and enter the criteria of your choice, but do not launch the search.
- 2 Go to **Tools > My searches > New search**. The **Search details** tab opens automatically.
- 3 Give a code and a call name to your search.
- 4 [Optional] Check **Yes/No**, depending on your needs:
  - Public: everybody can see the search.
  - Added to the main menu: an access to the search is available from My favorites.
  - Run automatically: search results are directly displayed; you do not need to open the search screen.
  - Modifiable by resources: employees can modify the search.
- 5 Click on the **Save** icon.
- 6 Go to the home page and open the **My searches** folder. Your search is displayed.
- 7 You must open the relevant folders, depending on whether your search is public or shared. All these searches are also available in **My Akuiteo** menu.



### Note

To display public or shared searches in other folders, go to **Edit > Preferences > General > check the boxes starting with "Open the... tree"**.

## 5.2 SETTING UP THE DISPLAY OF A CUSTOM SEARCH

It is possible to set up the display for each search.

- 1 Start your custom search from the home page.
- 2 Right-click on the search results. Options are available to filter, modify and categorize columns.
- 3 Once changes are made, click on  on the right, then click on **Yes** to confirm the changes.
- 4 If you want to save the results as a graph:

- Click on  and fill in the fields of the **Graph** window, then click on **Validate**.
- From the graph mode, click on  then confirm.

For example, you want to display only 2 columns: customer name and phone number.

- 1 Right-click on the search results.
- 2 Select **Manage columns > Manage columns**.
- 3 In the **Management of columns and their order** window, move the **Call name** and **Phone number** columns to the right. Move all other information to the left.
- 4 Restart your search. Only the **Call name** and **Phone number** columns are displayed.

## 5.3 MODIFYING A CUSTOM SEARCH


- 1 Open your custom search:
  - either from the home page if you have added it to the main menu,
  - or by opening the desired search from **My Akuiteo > My searches**.
- 2 Select the **My search** tab.
- 3 Go to **Tools > My searches > Modify the search** and make necessary modification.
- 4 Click on the **Save** icon.

### Note

You can enable the modification of a saved search by another employee. This feature is useful when you want to reuse a search made by an employee who left the company for example. To do so, you must activate the DMF 160306 TOOLS/SEARCHES/MODIFY SEARCHES FROM ANOTHER.

## 5.4 DISPLAYING CUSTOM SEARCH RESULTS AUTOMATICALLY

When creating a custom search, you can also automatically display the search results.

- Create a custom search and check **Run automatically**. When you click on your search in **My favorites**, the search results are displayed in a table.
- If you want to modify the search, click on the  icon from **the search result table**. You can now modify your search.

## 5.5 SENDING A CUSTOM SEARCH

To send a custom search to one or multiple **employees and/or profiles** or to **companies**:

- 1 In the relevant tables, select the employee or the profile of your choice (for example: Development team), or even the company that must have access to the search.

- 2 Save your selection. The search is available in the **Shared searches** folder in **My favorites** for the selected employee / profiles.

## 5.6 SEARCHING BY KEYWORDS

Use keywords to make a dynamic search based on search criteria (e.g. Date -- 7).

- 1 Select a saved search.
- 2 Open the search editor and click on **My search**.
- 3 Go to **Tools > My searches > Modify the search**.
- 4 In the **Keyword** field, open the help list and select the relevant keyword.

The field-keyword link is displayed in the table.

For example, the DATE\_DAY keyword enables you to enter a date field with the current day's date.

The **Preferences** menu enables you to automatically open custom searches from the home page.

## 5.7 DELETING A CUSTOM SEARCH

- 1 Start your custom search from the home page.
- 2 Select the **My search** tab.
- 3 Go to **Tools > My searches** and click on **Delete the search**.

## 5.8 UNREGISTERING FROM A CUSTOM SEARCH

If you have been associated with a custom search, you can unregister at any time.

- 1 From the shared searches in the home page, right-click on the search.
- 2 Select **Unregister me**.



The search is no longer displayed on your screen.

# 6 Creation and modification

To simplify your actions in Akuiteo, data are created and modified following the same process.

## 6.1 CREATION



To create a new item, you can follow the process described below as an example to create a customer record sheet.

- 1 From the customer search screen, go to **Edit > New > New customer** from the menu bar, or click on the  icon.
- 2 In the empty fields, enter the relevant data. To save the record sheet, you must fill in all required fields. A required field is indicated with an asterisk.
- 3 Save your creation by clicking on the  icon.

Once you save the record sheet, you can no longer modify it from the creation page. To do so, you must switch to the modification mode.


## 6.2 MODIFICATION

To modify a screen or add data, you must switch to the modification mode and follow the process described below as an example to modify a customer record sheet:

- 1 From a displayed record sheet, go to **Edit > Modify** or click on the  icon. Fields change color, a star is displayed to indicate a field being modified, and additional search tabs are replaced with new tabs.
- 2 Save your changes by clicking on the  icon.

Once you save the record sheet, you can no longer modify it. You must switch back to the **Modification** mode to do so.

## 6.3 CANCELLATION

If you mistakenly modified a screen, you can undo the action by clicking on the  icon. You are therefore redirected to the **Display** mode. If you try to close a screen when there are still fields to be filled in or if an error was detected, a message - underlined in red - is displayed to indicate the elements that must be corrected.

# 7 User preferences

The interface can be customized by each user. This customization only applies to the current user's workstation and does not impact other users.

Open the preferences window via **Edit > Preferences**.

User preferences are grouped into two main categories:

- **General preferences** (p. 24): related to the management of Akuiteo modules. This category enables the user to customize color codes, as well as tabs and information to show or hide.
- **Technical preferences** (p. 29): designed mostly for administrators, to help them set up technical preferences for all Akuiteo modules.

Other preferences and tools are also available in this category.

- Synchronization with Outlook: Akuiteo schedules can be synchronized with Microsoft Outlook. Thus, any modification made on one of the two softwares automatically impacts the other. The user defines the type of information to be synchronized (notes, tasks, appointments, allocations).
- The text field enables the user to filter the categories to display.
- The **Apply** button saves the modifications made, without closing the window.
- The **Restore Defaults** button cancels all modification made (back to the initial configuration).

## Tip

To easily find a specific preference, enter the characters of your choice in the search field at the top left of the screen, in the **Preferences** window. The preference menus that are displayed are automatically filtered based on entered characters; the filter is applied both on the menu's name and on a page's preferences.

## 7.1 GENERAL PREFERENCES

When you expand the **General** menu, a list of sub-menus is displayed.

### General

This setup enables you to set the following options:

- My default action code: the action code used by default in the **Schedules** and **Timesheets** modules.
- Project tasks default category: the type of tasks used by default in the **Events** module.
- Default category for notes: the type of notes used by default in the **Events** module.
- Default category for appointments: the type of appointments used by default in the **Events** module.
- Default category for the calendar: the type of schedules used by default in the **My schedule** module.
- Default category for emails: the type of email used by default in the **Email management** module.
- Minimize the application...: minimizes the application to the system tray.



- Open the ... tree: if checked, the tree of the specific menu stays open.
- Time validation opening mode...: select the type of view to display by default from the interactive dashboard in **My Akuiteo**.
- Open the URLs in: enables you to determine whether a hypertext link must be opened by default in your browser or in Akuiteo. This preference is active only when the URL's display of the desired screen has been set up in the Setup module.
- In the Excel exports, set the '0' value in the empty numeric cells.
- Field information: set up a context help (help icon) on some fields — **Systematic** or **On demand** — to prevent employees (especially new employees) from making errors when filling in fields.

## Purchase administration

This parameter enables you to set:

- the tabs to hide or show in a supplier record sheet.
- the fields and sections available for a supplier invoice search.
- the tabs to open by default and to show for quotes, orders, billing tables, receptions or invoices.

## Sales administration

This parameter enables you to set:

- the type of expense: PM, Other incurred costs, LP Depending on your choice, the type of expense will be selected by default when adding a cost line in a quotation.
- the tabs to hide or show in customer record sheets and the Sales Dashboard.
- the fields and sections available for a customer invoice search.
- the tabs to open by default and to show for opportunities, quotations, orders, billing tables, deliveries or invoices.

## Project

It enables you to decide whether or not to display the project's custom data in search results.

### Project record

This parameter enables you to set:

- the tabs to open by default in the **Project** record sheet and in the billing tool.
- the default codes for budgetary control and project summary.
- whether the results analysis period start date is the same as the project start date.
- whether the run parameters window must be hidden by default when starting the application.

### Schedule storage

Schedule storage enables you to keep a record of a schedule at a given moment in order to make future comparisons.

This parameter enables you to set:

- the overflow and advance thresholds (in days).
- the associated color code.

### Actions

This preference enables you to define the icons to be displayed by default when printing a project record on:

- budget control.
- schedule analysis.
- time analysis.
- billing tool.

If these options are not checked, you can only access these features through **Edit > Dashboard** in the menu bar.

### Commercial DB Table

This preference enables you to define the sections to hide or show by default in the Commercial Dashboard Table.

## Employee

### Timesheet

This parameter enables you to set:

- if the time spent must be displayed in the **Validated** category.
- if the timesheet view must be customer-oriented rather than project-oriented.
- the colors to display for the timesheets check.

### Calendar

This parameter enables you to set:

- the tasks to hide or show in the calendar.
- whether to hide or show the events to which the employee is linked.
- whether to hide or show the events of which the employee is the owner.
- whether to hide or show the schedules by default in **My Favorites**, in the home page.
- the opening hours of the employee's company, which can be customized if needed.

## Training

This parameter enables you to set:

- the color code for task processed costs.
- the color code for task costs dashboard. By default, grouping criteria are in black. The user can customize the color associated with a criterion.
- the color code for task unit dashboard. Grouping criteria are in black. The user can customize the color associated with a criterion.
- whether the participants of the training session must be added in acknowledgments of registration sent by email.

## Accounting

These options enable you to automatically open a dialog box each time a record sheet is opened, to select the printing format for the following documents:

- summary
- details
- ledger
- trial balance

## Help Desk

### New issue

This parameter enables you to set:

- the tabs open by default for customer sites and contacts.
- the preferences for help list filters.
- the sections to open automatically for customer issues and supplier contracts.
- the automatic selection when there is a single customer, site, contact, contract, service or product.
- the contracts to hide by default.

### Deadlines

This preference enables you to set up a customer "short" due dates and deadlines and assign them a duration and a color code. This impacts the countdown displayed in the issue.

### Issues and tasks

This setup enables you to set the following options:

- Open the ... section by default: determines the sections opened by default in the Issues and tasks screens.
- Actions: defines the icons to be displayed in issues and tasks. The **Core** indicator for some of the checkboxes means that these icons will be displayed in both issues and tasks.
- Banner: to set headers' banners to be displayed in documents for issues and tasks.
- Colors: to set the colors to associate with actions performed on issues and tasks.
- Transmissions by email: to indicate whether the requester must be automatically added as an email's recipient.
- Issue criteria: initializes issues search criteria.
- Task criteria: initializes tasks search criteria.

### Dashboard

This parameter enables you to set:

- automatic dashboard's opening and refreshing setup.
- the type of search to open by default.
- the default search criteria for a request.
- the default search criteria for a task.

## Contracts

This parameter enables you to set:

- the default tab to display when opening a customer and supplier contract.
- the automatic opening of the customer contract record if it is the only match returned by a search.

## IT equipment

This setup enables you to set the following options:

- IT equipment colors: selection of colors for maintained products.
- IT equipment search: selection of the third party type to check by default: Customer / Supplier / Internal.

## Schedule

### **Schedule**

This parameter allows the user to disable categorization when opening a schedule.

### **My Schedule**

This parameter enables you to set:

- information to be displayed on the left, in the schedule tree structure.
- the type of display on a line and the related sorting order.
- the number of weeks to view before and after the current date.

### **Project schedule**

This parameter allows you to define the type of sorting (project code, project name or customer) that you want to display in the project task schedule.

### **Schedule: assignments**

This setup enables you to set the following options:

- Schedule: assignments: indicates whether events (task and appointment), over and under-scheduling thresholds and training tasks must be displayed.
- Intervals: define the information shown in the intervals in the assignment schedule.
- Tooltip for intervals: define the type of information shown in tooltips for the intervals in the assignment schedule.

### **Schedule colors**

This parameter enables you to setup the schedule color for a project's events, tasks and allocations.

## Documents

This parameter enables you to set:

- whether you want to systematically link reports to management objects.
- whether each document generated directly via the network must be opened automatically.

## Office automation

This parameter allows you to set the tools to connect with Akuiteo such as office tools, email softwares or electronic agendas.

## Transmissions by email

This parameter enables you to set:

- the type of attached files to send by email (DOC, PDF, HTML or XLS files).
- the email body format (HTML, text or empty).

## Language

This parameter allows you to setup the language to use in the Desktop application. The modification is only applied after the user restarts the application. The available languages are the ones that have been already configured.

## Login

This setup enables you to set the following options:

- Authentication setup: Issue or Automatic.
- User data: user name and password.
- Server data: allows you to define the automatic update of the application and modify server-related data.

# 7.2 TECHNICAL PREFERENCES

When you click on the **Technical** menu, a list of sub-menus is displayed.

## Technical

This setup enables you to set the following options:

- Maximum number of results before raising an alert: when you start a search and the results exceed the maximum number set for this field, then a window pops up, asking you to choose whether to refine your search or display all the results.
- Result limit for **lazy** display (0 to disable): this advanced option refers to tables display in Akuiteo. If you disable the **lazy** mode by entering 0, results will be quickly displayed but their use will be slowed down. However, though it takes time to load data in tables, in **lazy** mode, these data can be quickly used once they are displayed.
- Choice of date format: select the date format for all the dates in the application.
- Choice of number format: select the input format for numbers in the drop-down list. It is possible to choose between **French** format, for which the separator for thousands is a full stop and the decimal separator is a comma, and the **American** display, for which the separator for thousands is a comma and the decimal separator is a full stop.

## Help list

This parameter enables you to set:

- the character that opens the help list after pressing the Tab key. The default character is '?'.
- the width of the pop-up help list. The default width is 800 pixels.
- the length of the pop-up help list. the default length is 600 pixels.
- whether to save size changes in the help list or not.

## Help list with project filters

This parameter enables the user to define the type of projects to display in help lists.

For example, to filter the projects available for timesheets entries:

1. Check one or multiple filter boxes. E.g: you check **Projects scheduled for the month** and click on Apply.
2. Go to **My Akuiteo > My timesheet** and add a line.
3. Press F4 to open the filter window.
4. Click on the **Projects scheduled for the month** link. The list displays the relevant projects.

The same feature is available in the Web Portal through the use of DMFs. Please refer to the Web Portal documentation.

## Table Pref.

This parameter enables you to set:

- the adjustment of columns and lines when opening a table.
- the number of characters to display in the table.
- the default height and width (in pixels) of graphic schedules.

# 7.3 USING PREFERENCES TEMPLATES

You can save display and use preferences, to adequately work in an environment shared with other employees without losing track of your work each time you log into the application.

### Prerequisites

The PREF\_SAUUV\_BDD application control must be active.

## 7.3.1 Preparing preferences to be exported

A dedicated user must customize:

- Search results columns (invoices, customers, projects, and so on)
- The **Preferences** options from **Edit > Preferences**.

## 7.3.2 Saving the work in a template

- 1** Go to **Tools > Setup > General setup > Special parameters > Preferences > Export Preferences**.
- 2** In the **Export of preferences** dialog box, enter a code and a label, then validate.

## 7.3.3 Applying this template to users



- 1** Go to **Tools > Setup > General setup > Special parameters > Preferences > Preferences templates**.
- 2** Start the search.

- 3 Select the template of your choice and switch to the modification screen.
- 4 In the **User** field, select users then press **Enter** to validate the selection.

### 7.3.4 Updating preference templates

- 1 Go to **Tools > Setup > General setup > Special parameters > Preferences > Export Preferences**.
- 2 In the window, enter the existing code.
- 3 Click on **OK** to replace the preference template.

### 7.3.5 Removing users from preference templates

- 1 Open the preference template and click on .
- 2 Select the users and click on .
- 3 Save.

#### Important


If a user changes his/her columns, then all previous work will be replaced — at the next connection — with the **Preferences template** the user is linked to. The user must be removed from the template to be able to customize their own user preferences. The user can also use saved searches.

# 8 Lists

In Akuiteo, lists can be displayed as:

- Simple tables: These tables display information that cannot be modified. They can be found in help lists, for example.
- Tables with categories: These tables are similar to tree views. They are simple tables that can be exploited. Tables with categories are mainly used to display search results.

## Text filter

- 1 From the action bar, click on  or press CTRL+F to open a text search field at the top of the list.
- 2 In this field, type in the searched terms separating them with spaces:
  - Terms separated by spaces are taken into account as logical ANDs.
  - Terms between quotation marks, such as "*searched terms*", are considered as exact expressions.
  - Special characters are also taken into account.
  - Accents and case are not taken into account.

- 3 Press Enter or the Tab key to validate the search.

↳ The list is automatically updated based on applied filters.

Click on  to hide the search field and reinitialize the results list.

Right-click on a table with categories to access specific features. Features can be general or specific to a module.

## Export

Data tables can be exported to Excel. The four options available enable you to indicate the lines and columns to be included in the export file.

## Filter

Following a search, you can further filter the results to display columns based on:

- the field's content (empty or not)
- the character string contained in the column
- the first letters of the column

## Categorization

Some results lists can be categorized: you can group lines based on several criteria (group invoices per customer / month, etc.). The table becomes a tree structure with nodes that can be opened or closed. You can also perform operations on categories: sums, percentages, etc.



When categorizing a list, each header's line retrieves the same textual information for all the lines in the category. However, date or number fields are never retrieved in the header's line.

### Example

You categorize project search results per customer. The table becomes a tree structure organized by customer where you can expand each customer to display the list of this customer's projects.

For each customer, the header's line retrieves the same textual information for all the projects linked to that customer: the name of the customer, the project's manager, the type of project, etc. However, dates and numbers are not retrieved in the header's line.

## Adjustment of columns

This feature is used to adjust the column's width to make it fit the text's length.

## Manage columns

This feature is used to select or unselect columns in a table in order to hide or show them.

## Open the node

















If the user has grouped lines in a table (Categorization feature), the **Open the node** feature opens all the lines of the table.




## Close the node

If the user has grouped lines in a table (Categorization feature), the **Close the node** feature only displays the categories of the grouped lines. For example, if the lines are grouped by project, to **Close the node** will only display the project's names.

## 9 Icons

Several icons are available in the interface. Here are the icons you will see the most.

	Displays the home page and its main features.  Shortcut: F3
	Launches a search based on specified criteria. Available for almost all modules.  Shortcut: Ctrl+R
	Saves the data and switches to the display mode. When an object has not yet been saved, an asterisk is displayed on the left of that object's tab.  Shortcut: Ctrl+S
	Prints data in the selected format. When you select a report template from the list, you must also choose the printing type for that report (.doc, .pdf or .html) as well as the mode (print or send by email). Sending by email means emailing the report (as an attached file) to the recipient of your choice, using Microsoft Outlook.
	Refreshes the displayed page. Use it if data could have been modified since you last opened a page.  Shortcut: Ctrl+F5
	Creates a new blank record sheet (customer, prospect) or adds a new line (order).  Shortcut: F11
	Adds a pre-filled line in the list.  Shortcut: F12
	Enables you to import data (through the Browse link and by specifying the type of separator) from external sources, to avoid entering them again.
	Enables you to export data to a spreadsheet application. The first line is for column headers. Columns are sorted the same way as in Akuiteo data tables.
	Enables you to associate an external file (.doc, .xls...) with a record sheet or to create a new one from the interface.
	Enables you to switch between the display and the modification modes.
	Permanently deletes an object. Example: a quotation line.
	Cancels the previous action and switches back to the display mode.
	Displays the previous or next record sheets in alphabetical order.
	Displays the last saved record sheet. When launching a customers/prospects search, results will be displayed based on the selected option (customer or prospect).
	Searches for documents in Akuiteo.

	Displays several types of schedules (timesheets, quotation schedules...) depending on the screen displayed.
	Duplicates the record sheet that is displayed, if it was saved. The content of the new record sheet can be modified directly.
	Closes search windows.

# 10 Keyboard shortcuts

The following tips make it easy to use and navigate through Akuiteo:

- always press the tab key to exit a field in order to confirm an input,
- close useless tabs and search results,
- learn and use keyboard shortcuts.

## Note

Mac users should check their keyboard system preferences to be able to use the following shortcuts.

Shortcuts	Description
<b>On a record sheet in display mode</b>	
Ctrl + U	Activates the modification mode.
Ctrl + S	Saves data.
Esc	Goes back to a record sheet in display mode without saving the modification.
<b>In a search screen</b>	
Enter	Launches the search.
Alt + Q	Closes a search result.
Alt + M	Minimizes a search result.
Ctrl + F7	Changes a search result.
<b>For all screens</b>	
Tab	Enables you to browse between fields / confirm data input.
Ctrl + Tab	Exits a multi-line field.
<b>On the tables for data input</b>	
F9	Adds a new line.
F10	Adds a line.
F11	Validates an input.
F12	Deletes a line.
<b>In all the application</b>	
Ctrl + J	Opens the Change entity settings, a window that enables you to change the Company / Entity / Accounting period.
F3	Opens the home page tab.

Shortcuts	Description
F4	Validates accounting entries and management objects.
Ctrl + F5	Refreshes the screen.
Ctrl + F6	Switches from an open module to another (or changes the tab / editor).
Ctrl + N	Opens a new creation window based on the context (enables you to create a new user from the users search or a new project from a project record sheet).
Ctrl + P	<p>Switches to <b>Setup</b> mode to allow you modify, hide or create new custom controls (right-click on a control field).</p> <p>It is not necessary to restart Akuiteo.</p> <p>By right-clicking on <b>Make this field non-modifiable</b>, you prohibit any modification on a field.</p>
Ctrl + H or F1	Displays the Online Help.
Ctrl + Q	Logs out.
Ctrl + ALT + Left arrow	Displays the previous record.
Ctrl + ALT + Right arrow	Displays the next record.
<b>Specific</b>	
Ctrl + B	Updates the payment authorization on purchase invoices.