



Introduction

User guide

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TABLE OF CONTENTS

1.1	INTRODUCTION	3
	ROLETAILORED DESIGN.....	3
	USER INTERFACE	3
	BACK AND FORWARD BUTTON, ADDRESS BAR, SEARCH	5
	THE RIBBON	7
	THE NAVIGATION PANE	11
	THE STATUS BAR	16
	PAGES.....	17
	THE ROLE CENTER.....	23

1.1 INTRODUCTION

ROLETAILORED DESIGN

The RoleTailored user interface design provides you with a quick overview of the information relevant to your job and gives you the ability to focus on your own tasks over all others.

The new design enables you to:

- Focus, prioritize, and apply your expertise.
- Visualize and understand key data.
- Reduce the amount of time you spend searching.

This new role-based navigation reduces complexity by promoting areas of the application that are relevant to your role. Removing from immediate view those areas of the application that you seldom need reduces the amount of information that you have to sift through.

USER INTERFACE

This module introduces the general concepts of the user interface design in Evo-auction. With the user interface, you can focus, prioritize, and apply your expertise. Key data is visualized so that you better understand your business.

The user interface has different components, which are discussed in this module.

Evo-Auction Cataloguer - Microsoft Dynamics NAV

Auction House > Home > Search (Ctrl+F3)

ACTIONS

- Article Search
- Unique ID Lookup
- Refresh
- Contact Search
- Deferred Invoice Batch

Role Center

- All Receipts
- Auctions
- Sales Invoices
- Posted Sales Invoices
- Purchase Invoices
- Posted Purchase Invoices

Evo-Auction Cataloguer

Cataloguer Activities

Contact Search

Receipts

- 999+ Receipts
- 6 My Receipts

Auctions

- 311 Auctions
- 1 My Auctions

WEB

- 2 WEB Condition Report Requests
- 999+ WEB Post Auction WishList

Web Commissions

- 0 Web Commission Bids Ready to Insert
- 0 Web Commission Bids Failed to Insert

My Auctions

Open Auction Add Auction Dissociate New Find

No.	Auction Name	Auction Type	Auction Category	Auction Date
AS050117	Oriental works of art	SPECIALIST	Specialist	05/01/2017
AS060117	Oriental works of art	SPECIALIST	General	06/01/2017
AS070117	Oriental works of Art	SPECIALIST	General	07/01/2017

My Receipts

Open Receipt Add Receipt Dissociate New Find

No.	Name	No. Of Items
REC01408	Aaa Solicitors	8
REC01409	Aaa Solicitors	22
REC01418	Jim Capehorn	16
REC01419	Glen Snelling	6
REC01420	Alan Cook	26
REC01431	Monika Fakhoury	8

My Notifications

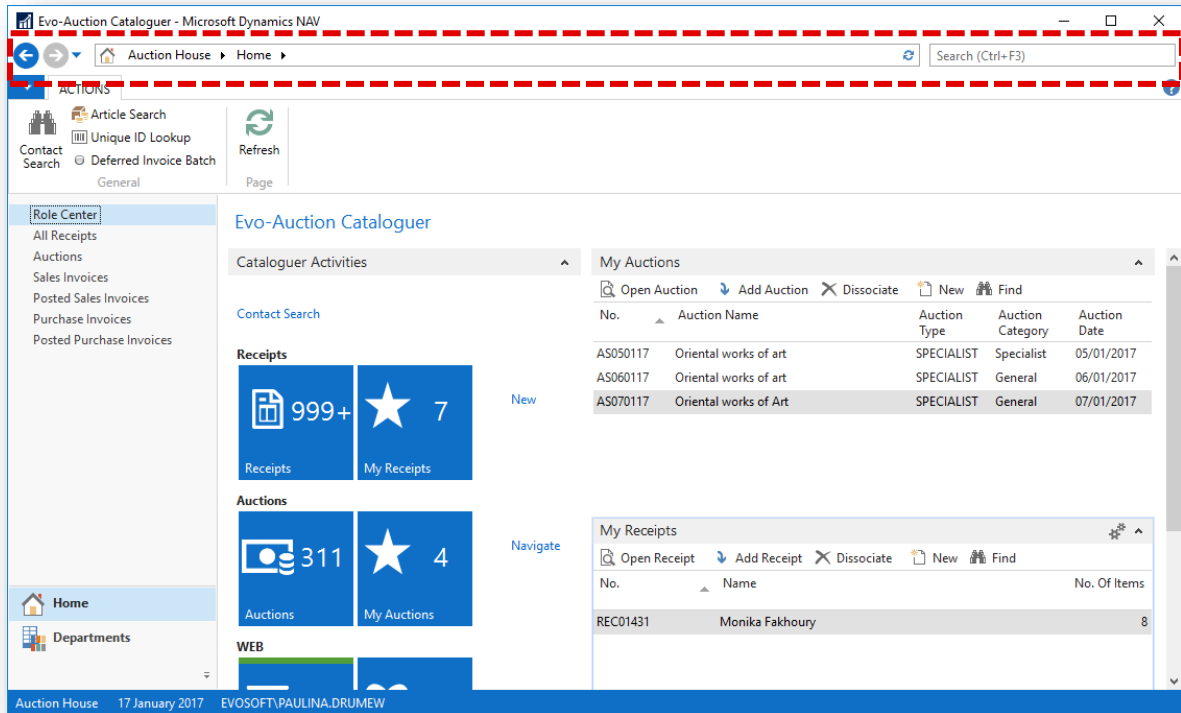
From	Created Date	Note	Page
------	--------------	------	------

Auction House 17 January 2017 EVOSOFT\PAULINA.DRUMEW

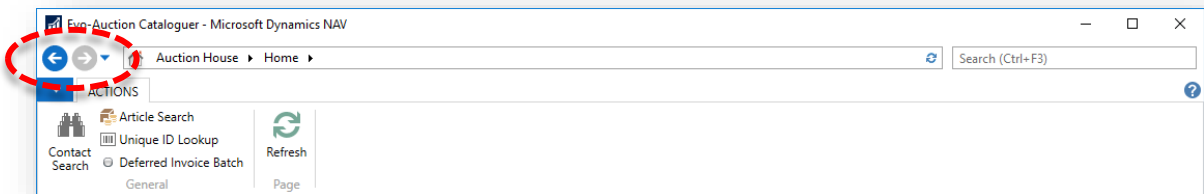
BACK AND FORWARD BUTTON, ADDRESS BAR, SEARCH

At the top the user interface, you can see the following components:

- Back and Forward buttons
- Address Bar
- Search



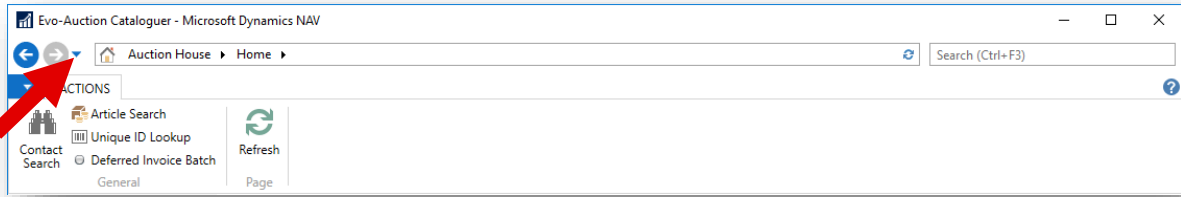
BACK AND FORWARD BUTTON



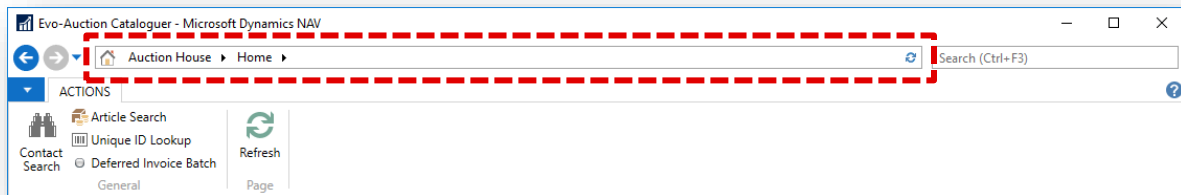
Back and forward buttons on the controls of Evo-auction to the left of the address bar enable you to move through pages that you have previously visited.

When you use these buttons, you can see the path in the address bar changing.

If you click the drop-down button, at the right side of the forward button, you see the travel history. It shows you a list of previously visited pages, and it makes it easy to return to a specific one.



ADDRESS BAR



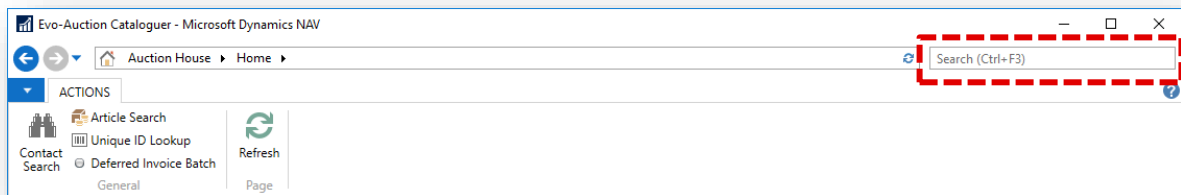
The address bar shows the path of your present page. You can also move within Evo-aucion by clicking the name or arrow buttons and making your selection.

At the right side of the address bar, you can find the refresh button.

NOTE

To refresh the active window, you can also use the keyboard shortcut F5.

SEARCH

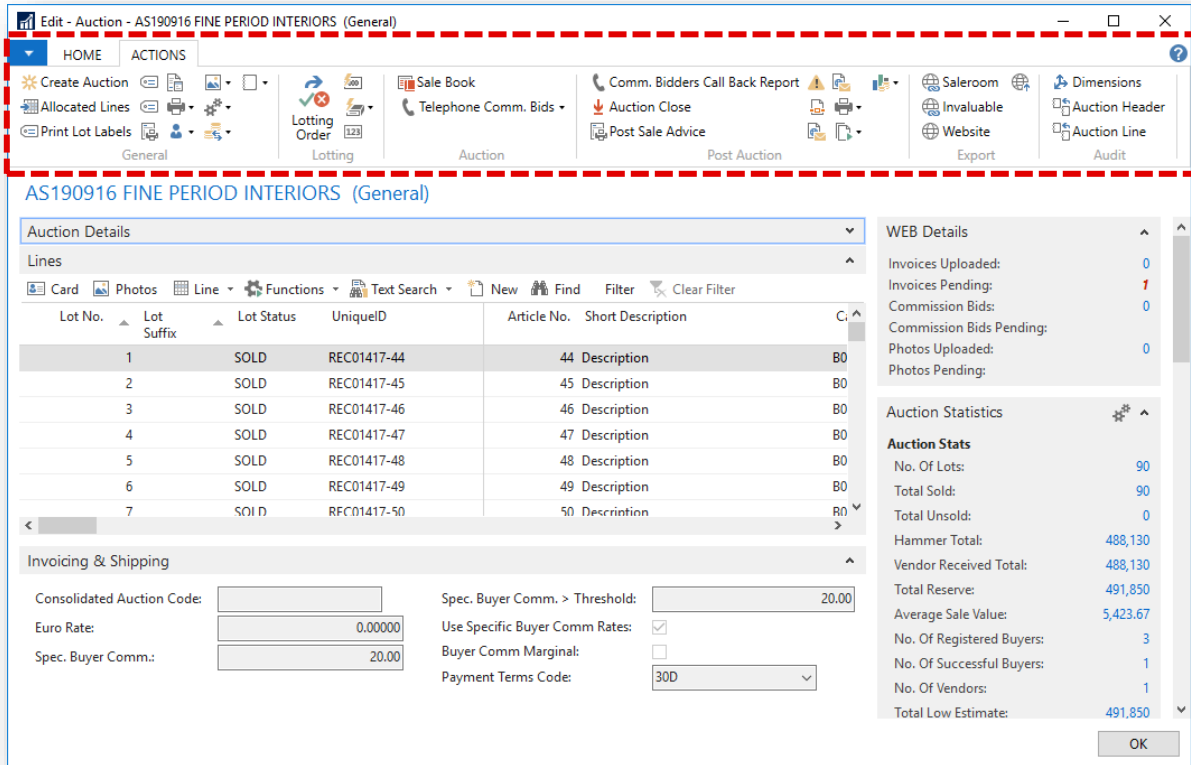


You can find any page or report by using the Search field in the upper-right corner of the address bar.

When you start to type characters in the Search field, a drop-down list shows page names that contain the characters that you type. The drop-down list changes as you type more characters, and you can select the correct page from the list when it is displayed. The second column in the drop-down list shows the navigation paths to the found pages, and it is sorted by the structure of the Departments page.

THE RIBBON

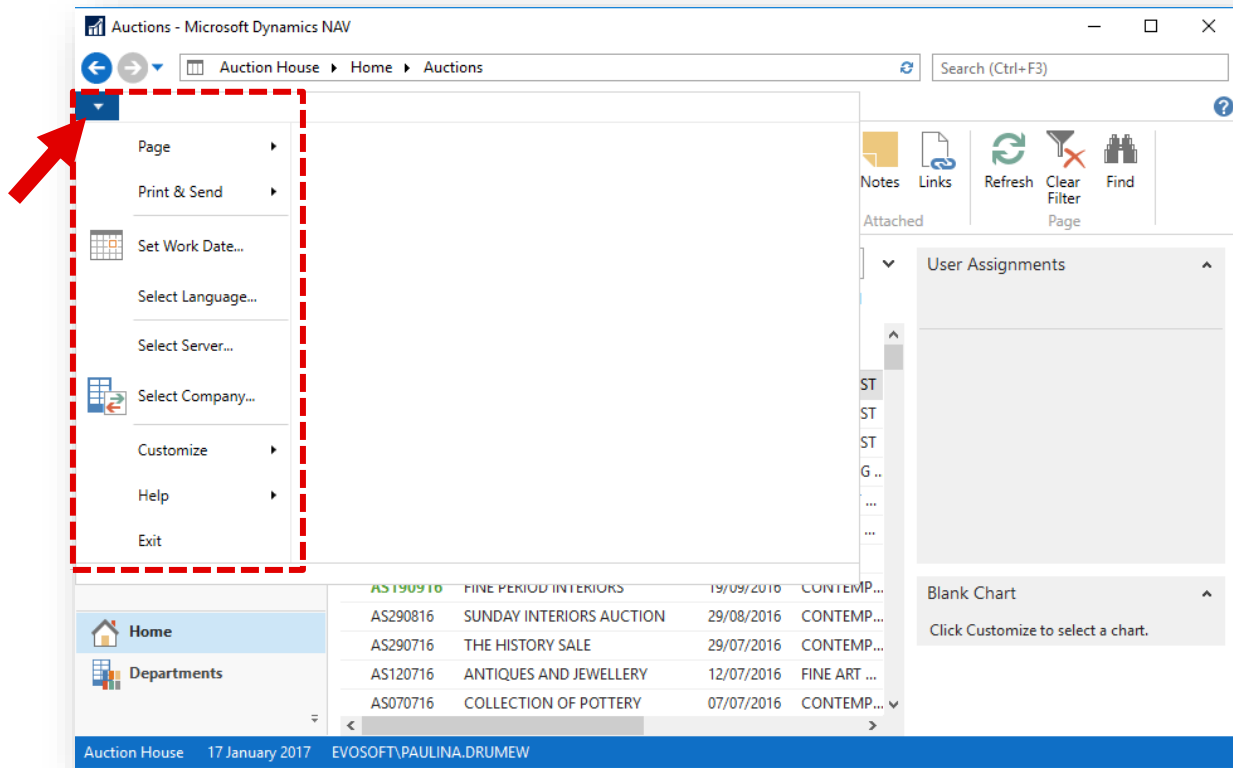
The Ribbon is a command bar that organizes a program's features into a series of **Tabs** at the top of a window, **Groups** and menu **Actions**. The Action shown in the Ribbon depend on page which is currently active.



Press Ctrl+F1 to toggle between collapsing and expanding the ribbon. This creates more space for the current page to display.

From all pages where the Ribbon is visible, the Ribbon can be customized to help you be more productive.

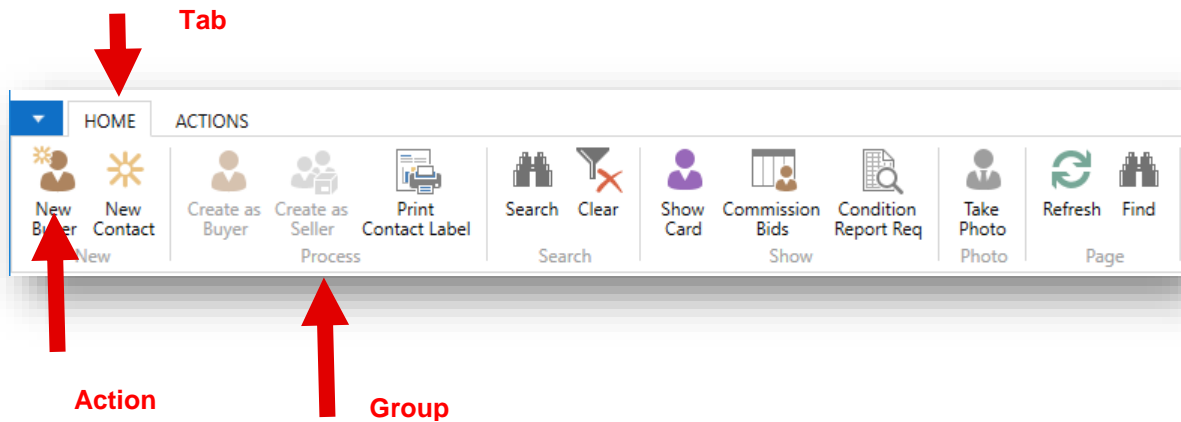
At the upper-left side of the Ribbon, you can find the **Application Menu**. If you click this button, you see a drop-down menu with several options.



Option	Description
Page	<p>When you select the Page, you see a submenu with the following options:</p> <ul style="list-style-type: none"> • Open in New Window – opens the page in a new window. This means that you can toggle between the different pages. • Copy Link to Page – copies the link of the active page to the clipboard. You can paste the link to, for example Microsoft Word. From there, you can then run the page. <p>These options are not available on the Role Center page.</p>
Print & Send	<p>The Print & Send function has following options:</p> <ul style="list-style-type: none"> • Email as Attachment – creates an HTML file of the active page. The file is attached to a new email message. • Microsoft Word – exports your data to Microsoft Word. • Microsoft Excel – exports your data to Microsoft Excel. • Print Page – prints the active page. <p>These options are not available on the Role Center page.</p>

Set Work Date	The default work date is the date that is specified in the Date and Time dialog box in Control Panel. To perform tasks such as completing transactions for a date that is not the current date, you may have to temporarily change the work date. Use this function to change the work date.
Select Language	Evo-auction is multi-language enabled. If other languages are installed, with this option you can change the language that the application uses.
Select Server	Use this function to select the server. If you want to select a company that is stored in a different database, then you must select the server before you can open the company.
Select Company	<p>You may have to change the company that you are working with. The companies that you work with can be stored in the same database or in different databases.</p> <p>Use this option to select a company.</p> <p>You can also open the Select Company window by selecting the company name in the status bar at the bottom of the program window or by pressing Ctrl+O.</p>
Customize	When you click Customize , you see a submenu with different customize options that you can use to change the layout of the user interface.
Help	<p>When you click Help, you see a submenu with the following options:</p> <ul style="list-style-type: none"> • Microsoft Dynamics NAV Help – the goal of the Help for Microsoft Dynamics NAV is to provide the information you need quickly and efficiently. • Page Notes - you can set up Evo-auction to work with Microsoft OneNote. With this option, you can open the notes of the active page in Microsoft OneNote. • About this Page – use this function to see more information about a page. This function shows all the fields for the current record in the table on which the page is based. For example, if you open All Receipts page, click Help, and then click About This Page, the About This Page: All Receipts window opens. The About This Page window shows the following FastTabs: <ul style="list-style-type: none"> ○ Page Information ○ Table Fields, sorted first by key fields, and then alphabetically ○ Source Expressions ○ FlowFilter Fields ○ URLs • About Microsoft Dynamics NAV – Displays version, license, and copyright information about Microsoft Dynamics NAV.
Exit	Use this function to exit Evo-auction.

THE RIBBON STRUCTURE



Tabs

The Ribbon organizes a program's features into a series of tabs at the top of a window. In Evo-auction the following tabs are generally used:

- Home - Contains the most frequently used actions, navigation options, and reports related to the active page. If available, it is always the first tab.
- Actions – Contains the full set of actions related to the active page.
- Navigate – Contains the full set of navigation options related to the active page. With these options, you can retrieve additional information on the records of the active pages, such as ledger entries and statistics.
- Report – Contains the full set of reports related to the active page.

Groups

Dividing commands into groups structures the commands into related sets. The group label explains the common purpose of its commands.

Examples of groups typically used in Evo-auction are as follows:

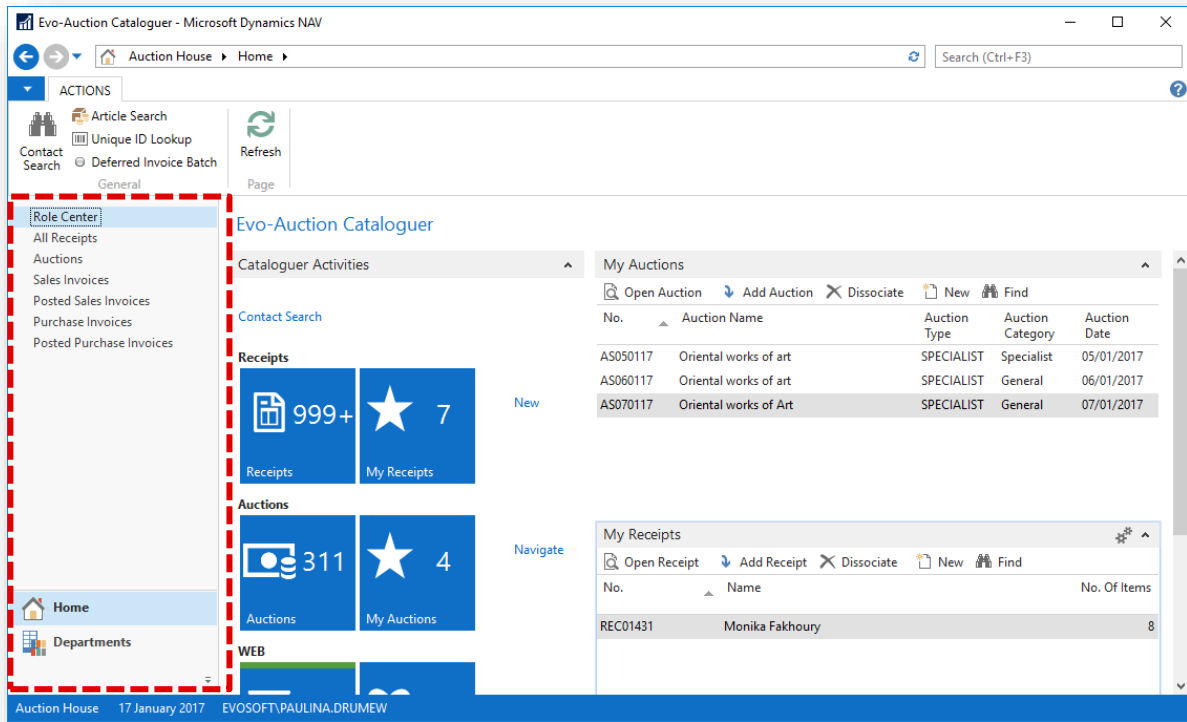
- New
- Manage
- Process
- Report
- View
- Page
- Actions

The actions on the Ribbon give you single-click access to functions and data.

NOTE

You can change the existing layout of the Ribbon by creating new tabs and groups, or by adding or removing actions from existing groups and tabs.

THE NAVIGATION PANE



The Navigation pane appears on the left side of the user interface. You use the Navigation pane to switch between different menus, such as Home and Departments.

From the Navigation pane, you can open list places. An example of a list place is the customer list. From a list place, you can open individual cards or documents. The Navigation pane displays one menu at a time. Use the activity buttons at the bottom of the pane to change from one menu to another.

At a minimum, the navigation pane contains the following menus:

- Home
- Departments

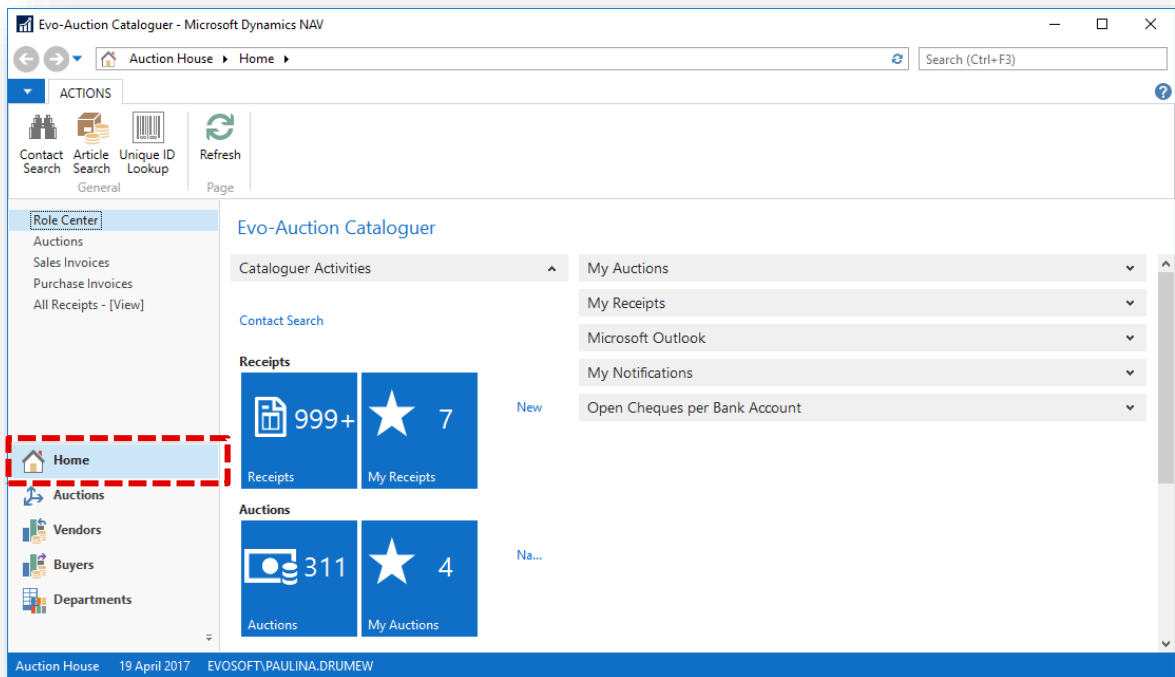
Depending on your user profile, various activity buttons may be available.

THE HOME MENU

The Home menu is a default activity button in navigation pane that displays items that link to list places.

The Home menu is designed for your user role. It contains your Role Center, plus all the list places that are most frequently used in your role in addition to relevant views of list places.

You can customize the Home menu by adding and hiding items.

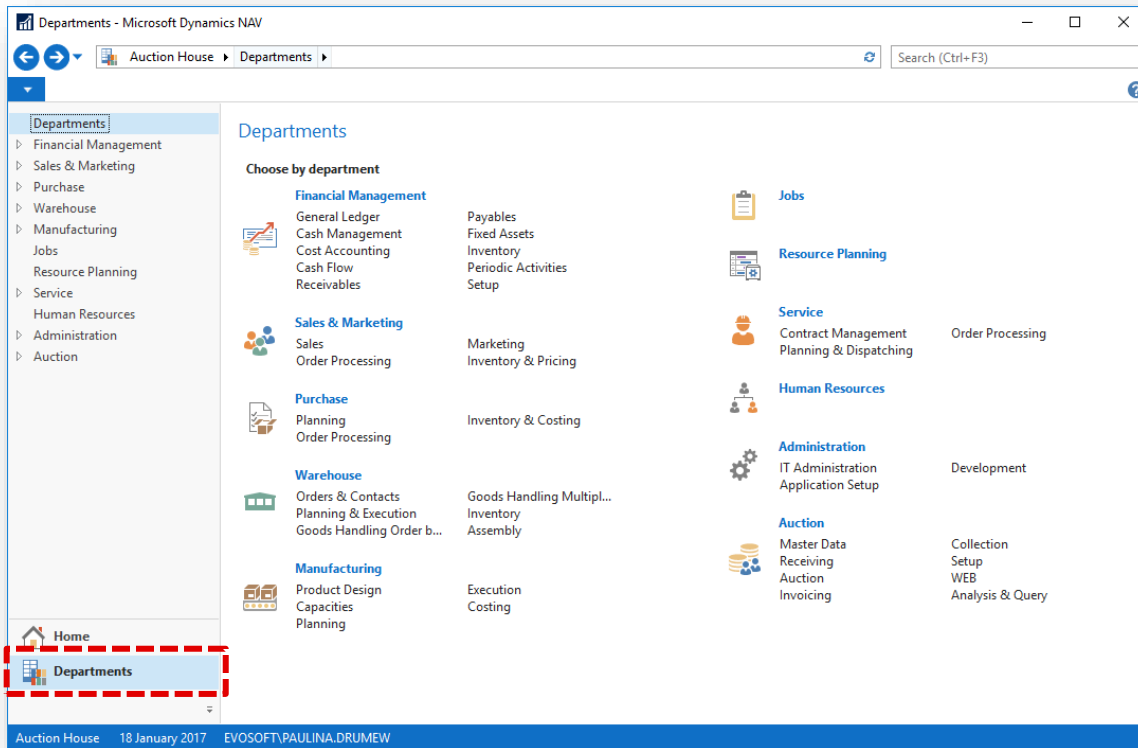


THE DEPARTMENTS PAGE

From the Departments page, you can access all the areas of the application for which you have permissions. If you find a useful link in Departments, you can copy it to your Role Center or Home activity button.

Every user has assigned a job-related profile by the administrator. Your profile gives you a Role Center and one or more activity buttons that you can use to access the tasks, lists, reports, and documents that you use most frequently. In addition, users typically have access to the Departments page.

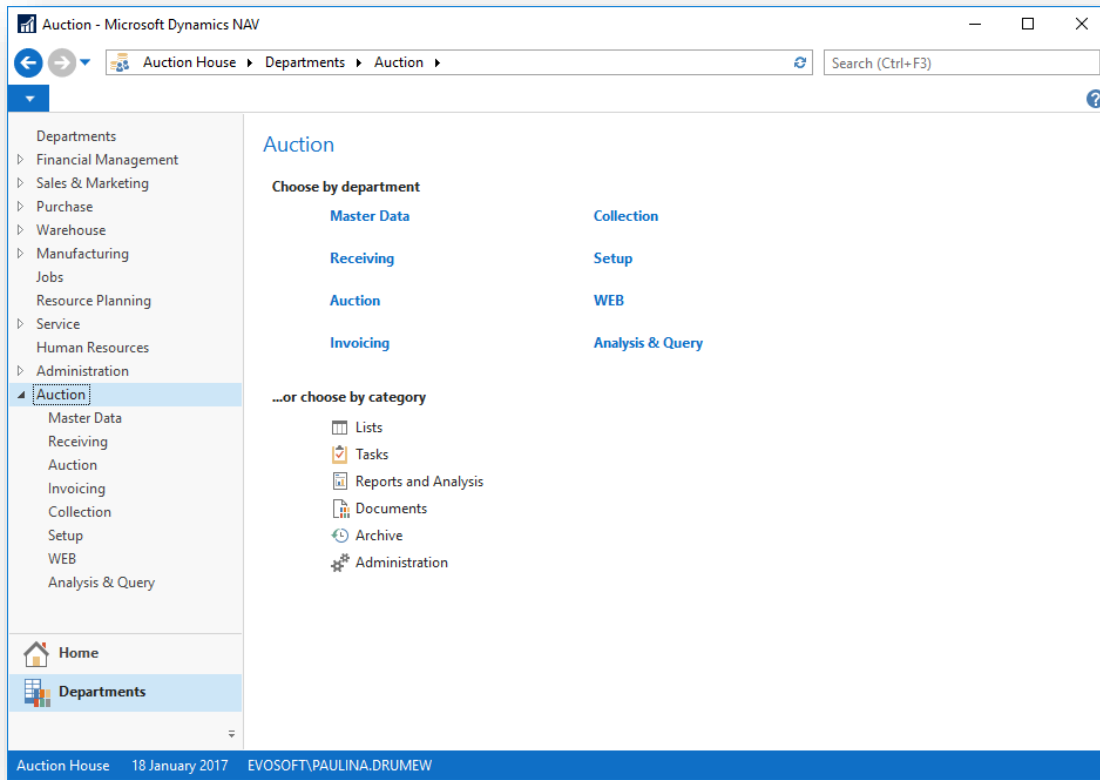
From the Departments page, you can browse to everything in Evo-auction to which you have access, including setup and configuration pages.



When you click a department, you have different navigation options available. You can browse to other departments. For example, from financial management, you can browse to general ledger.

You can also make a selection by one of the following categories:

- Lists
- Tasks
- Reports and Analysis
- Documents
- Archive
- Administration



ADDITIONAL NAVIGATION PANE ACTIVITY BUTTONS

In addition to the Home and Departments activity buttons, you can also reach several other navigation pane activity buttons. These additional buttons can be predefined in your user profile, but you can also create new activity buttons. An example is the Buyers menu, in which you can find an overview of Buyers, Auctions, Sales Invoices and so on.

Buyers - Microsoft Dynamics NAV

Auction House > Buyers > Buyers

HOME ACTIONS NAVIGATE REPORT

Sales Quote Reminder Edit Customer - Top 10 List
Sales Invoice New View Cash Receipt Journal Customer - Order Summ
Sales Order Delete Cash Receipt Journal Customer - Sales List

New Manage Process Report

Buyers

Auctions
Sales Invoices
Posted Sales Invoices
Collections
WEB Commissions
Posted Collection

Home
Auctions
Vendors
Buyers
Departments

Buyers

Mar...	No.	Salutation Description	First Name
<input type="checkbox"/>	BC0004883	Miss	Anna
<input type="checkbox"/>	BC0004882	Miss	Pauline
<input type="checkbox"/>	BC0004881	Mr	Edward
<input type="checkbox"/>	BC0004880	Mr	Mark
<input type="checkbox"/>	BC0004879	Miss	Alison
<input type="checkbox"/>	BC0004878	Mr	Andy
<input type="checkbox"/>	BC0004876	Mr	Terry
<input type="checkbox"/>	BC0004873	Mr	Andrew
<input type="checkbox"/>	BC0004872	Mr	Chris
<input type="checkbox"/>	BC0004870	Mrs	Andrea
<input type="checkbox"/>	BC0004868	Mrs	Joan
<input type="checkbox"/>	BC0004867	Mr	Glen
<input type="checkbox"/>	BC0004866	Mr	Alan
<input type="checkbox"/>	BC0004862		Andy
<input type="checkbox"/>	BC0004859	Mrs	Sue
<input type="checkbox"/>	BC0004858		

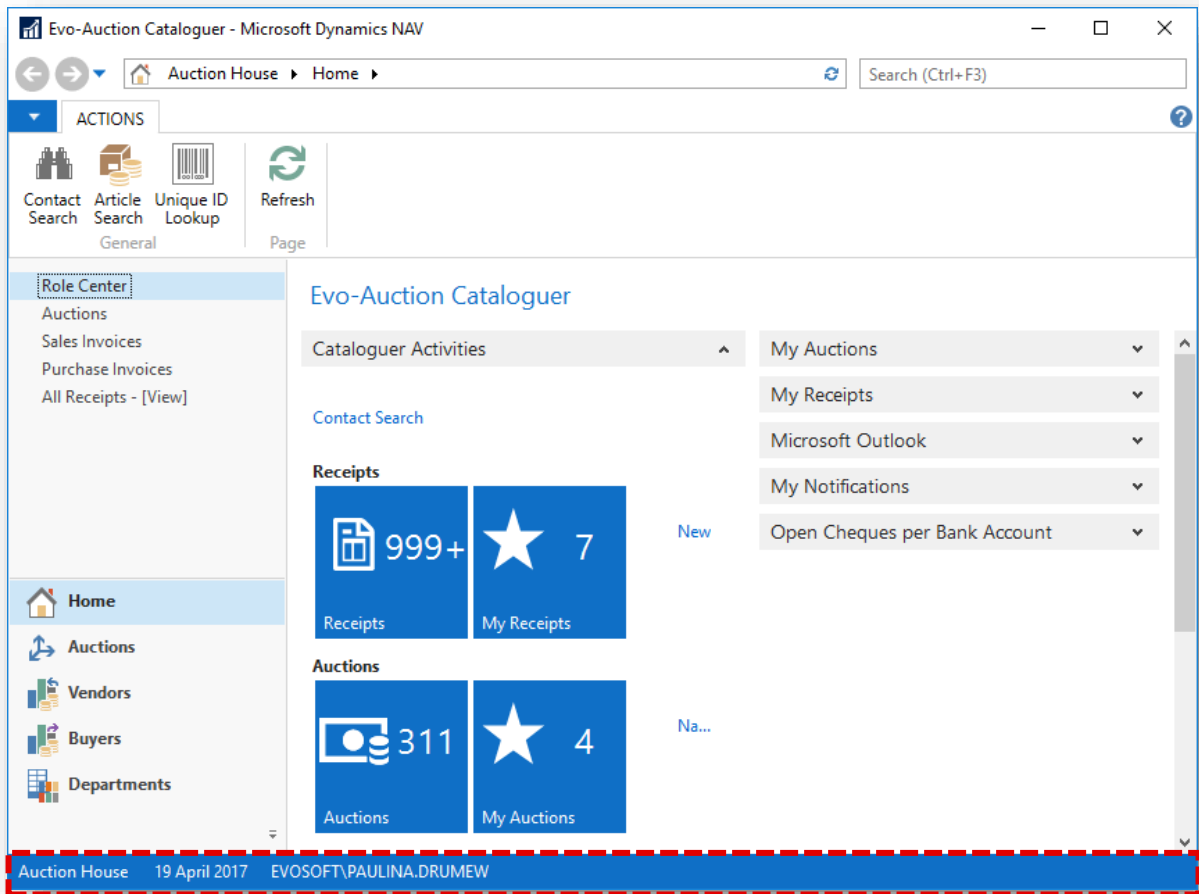
THE STATUS BAR

The status bar at the bottom of the program window shows the following information:

- The name of the auction house
- The work date
- The current user ID

You can change the active auction house by double-clicking the auction house name in the status bar. This opens the Select Company window, where you can switch to another auction house name.

Similarly, you can change the work date by double-clicking the work date in the status bar. The Set Work Date window opens so you can change the work date.



PAGES

In Evo-auction, pages are the main way to display and organize data. Pages offer a visual experience closely aligned to Microsoft Office and Windows.

In the Windows client, every user has a Role Center page, customized to the individual needs and tasks that each user performs. Other types of pages, such as list pages might display lists of customers or auctions, whereas others such as document pages focus on user tasks.

The following page types are available:

- Card
- List
- Role Center
- Document

LIST PAGE

A list page displays content from a table in a list format. List pages can be displayed as list places (as part of the navigation layer) or in task pages.

Most records in the database are presented first in list places, one for each record type, such as All Receipts, Auctions, Cash Receipt Journals or Posted Sales Invoices. List places may be filtered by default configuration, such as Auction number, Unpaid Posted Sales Invoices, and you can set your own filters to limit the number of records shown.

The screenshot displays the Microsoft Dynamics NAV interface for the 'Buyers' page. The ribbon at the top contains various action groups like 'HOME', 'ACTIONS', 'NAVIGATE', and 'REPORT'. The filter pane on the left shows a search box and a 'No filters applied' status. The central data table lists buyers with columns for 'Mar...', 'No.', 'Salutation', 'Description', 'First Name', 'Surname', 'Address', and 'Address 2'. The FactBox pane on the right shows summary statistics for the selected customer, including 'Customer No.', 'Balance (LCY)', 'Credit Limit (LCY)', and 'Overdue Amounts (LCY)'.

Mar...	No.	Salutation	Description	First Name	Surname	Address	Address 2
<input type="checkbox"/>	BC0004859	Mrs		Sue	Morgan	10 Eastworth Road	
<input type="checkbox"/>	BC0004862			Andy	Galazka	1 Windsor Street	
<input type="checkbox"/>	BC0004866	Mr		Alan	Cook	Bridge Road	
<input type="checkbox"/>	BC0004867	Mr		Glen	Snelling	Guildford Street	
<input type="checkbox"/>	BC0004868	Mrs		Joan	Parkinson	Waters Edge	
<input type="checkbox"/>	BC0004870	Mrs		Andrea	Marlon	Unknown Road	
<input type="checkbox"/>	BC0004872	Mr		Chris	Cunningham	33 Surrey Hills	
<input type="checkbox"/>	BC0004873	Mr		Andrew	Gobbee		
<input type="checkbox"/>	BC0004876	Mr		Terry	Else	41 Ashford Road	
<input type="checkbox"/>	BC0004878	Mr		Andy	Galazka	63 Monks Ave	
<input type="checkbox"/>	BC0004879	Miss		Alison	Morgan	3 Green Lane	
<input type="checkbox"/>	BC0004880	Mr		Mark	Proctor	7A Patriot Drive	
<input type="checkbox"/>	BC0004881	Mr		Edward	Corn	8 Middlesex Street	
<input type="checkbox"/>	BC0004882	Miss		Pauline	Duncan	4 Meadow View	
<input type="checkbox"/>	BC0004883	Miss		Anna	Streeter	1 Pound Road	
<input type="checkbox"/>	BC0004886	Ms		Monika	Fakhoury	12 Pine Court	

A list page has the following components:

- Ribbon
- Filter pane
- List
- FactBox pane

If you double-click (or press Enter Key) on a line in the list, the record opens in a new window in the default mode (Edit, View, or New) of that particular record, for example View mode if it is a posted document.

Filter pane

You use filters to display certain accounts, customers, entries, or other records by specifying criteria for fields in a table. You can use the filter pane on a page to specify a single field filter.

If you want to filter on more than one field, then you must use the **Advanced Filter** function on the filter pane.

The screenshot shows the Microsoft Dynamics NAV interface for the 'Buyers' list. The ribbon includes 'HOME', 'ACTIONS', 'NAVIGATE', and 'REPORT'. The filter pane is highlighted with a red dashed box and contains the text 'Show results: Where No. is Enter a value.' with an 'Add Filter' button. A red arrow points to the 'No.' dropdown menu. The main area displays a table of buyers with columns for No., Salutation, Description, First Name, Surname, and Address. The FactBox on the right shows 'Sell-to Customer Sales Hi...' and 'Customer Statistics' for customer ZDAR01.

No.	Salutation	Description	First Name	Surname	Address
BC0004859	Mrs		Sue	Morgan	10 Eastworth Road
BC0004862			Andy	Galazka	1 Windsor Street
BC0004866	Mr		Alan	Cook	Bridge Road
BC0004867	Mr		Glen	Snelling	Guildford Street
BC0004868	Mrs		Joan	Parkinson	Waters Edge
BC0004870	Mrs		Andrea	Marlon	Unknown Road
BC0004872	Mr		Chris	Cunningham	33 Surrey Hills
BC0004873	Mr		Andrew	Gobbee	
BC0004876	Mr		Terry	Else	41 Ashford Road
BC0004878	Mr		Andy	Galazka	63 Monks Ave
BC0004879	Miss		Alison	Morgan	3 Green Lane
BC0004880	Mr		Mark	Proctor	7A Patriot Drive
BC0004881	Mr		Edward	Corn	8 Middlesex Street

The filter pane in list pages can also be used to create Views at the navigation pane. When a filter is defined and you expect to use it again, you can streamline your work by using the **Save View As** function.

The screenshot shows the Microsoft Dynamics NAV interface for the 'Buyers' list page. The navigation pane on the left lists 'Buyers', 'Auctions', 'Sales Invoices', 'Posted Sales Invoices', 'Collections', 'WEB Commissions', and 'Posted Collection'. The main area displays a list of buyers with columns for 'Name', 'Surname', and 'Address'. A context menu is open over the list, showing 'Filters' and 'Views' sections. The 'Save View As...' option in the 'Views' section is highlighted with a red dashed circle. A red arrow points to the 'Buyers' dropdown menu at the top of the context menu.

Name	Surname	Address
BC0004859	Mrs Sue	Morgan 10 Eastworth Road
BC0004862	Andy	Galazka 1 Windsor Street
BC0004866	Mr Alan	Cook Bridge Road
BC0004867	Mr Glen	Snelling Guildford Street
BC0004868	Mrs Joan	Parkinson Waters Edge
BC0004870	Mrs Andrea	Marlon Unknown Road
BC0004872	Mr Chris	Cunningham 33 Surrey Hills

FactBox

FactBoxes on list places and task pages give you additional information about the selected record. This means that you can quickly find related information about, for example an auction. This helps you make solid business decisions in a timely manner.

For example, on the Buyers list place, you can use the Customer Statistics FactBox for a quick overview of a customer’s auction statistics without opening the customer card.

The FactBox includes a count and links to Auctions Attended, Los Purchased, Overdue Amounts, and other information so that you can drill-down to the document that you want.

Customer Statistics	
Customer No.:	BC0004882
Balance (LCY):	834.82
Credit Limit (LCY):	0.00
Overdue Amounts (LC...)	834.82
Auction	
No. Of Auctions Atten...	8
No. Of Lots Purchased:	111
Hammer Price Total:	521,260.00

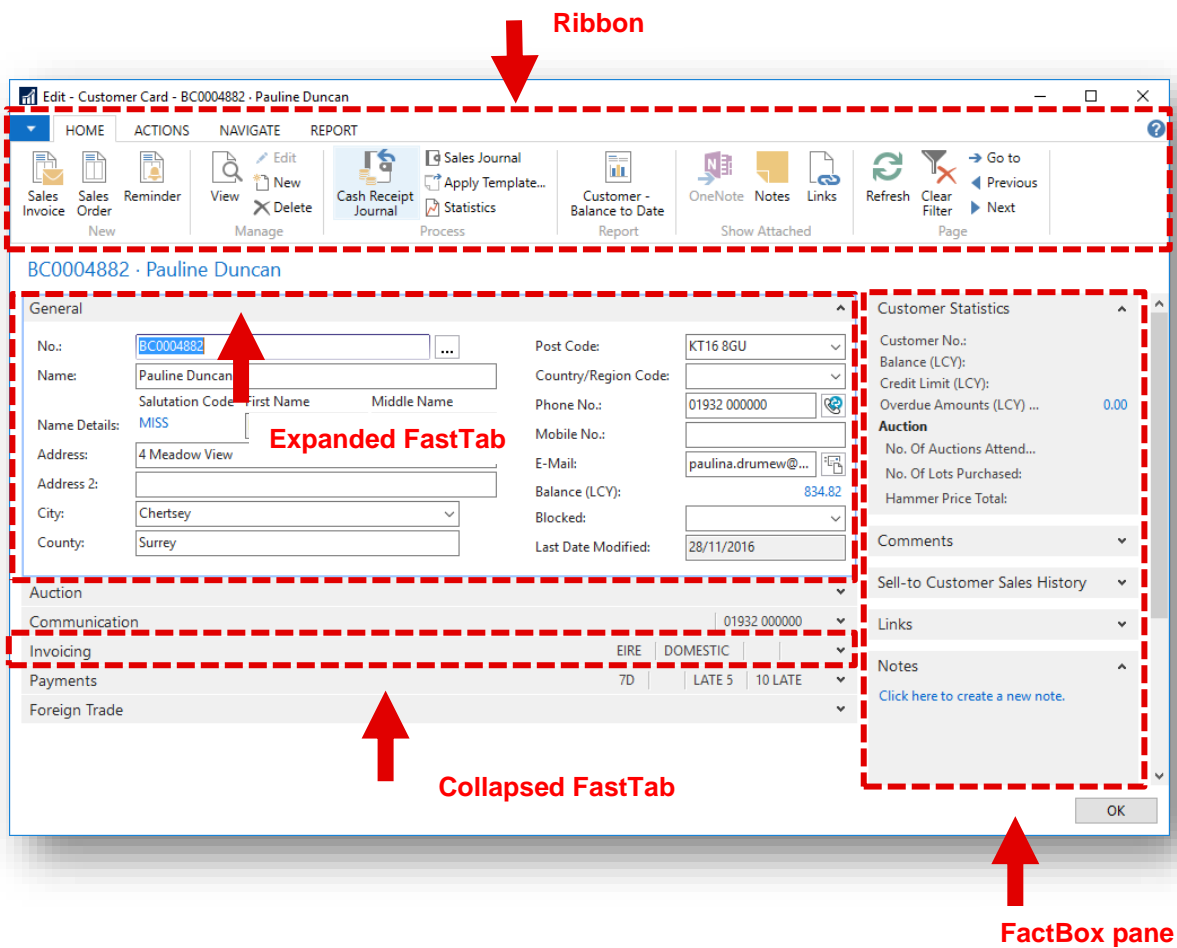
You can specify which FactBoxes you want to display on a page. You can also show and hide FactBox fields. You can add FactBoxes from the list available, but you can only add various charts to what can be selected.

CARD PAGE

You use a card page to view and edit one record or entity from a table. The card page displays selected fields from the table. An example of how to use a card page is for editing a customer.

A card page has the following components:

- Ribbon
- Expanded FastTab
- Collapsed FastTab
- FactBox pane



FastTab

FastTabs organize data in separate groups on a page. You can expand and collapse FastTabs so that you can control how much information you see at one time. To expand or collapse a FastTab, click the small arrow on the far right of the band.

The screenshot shows a 'General' FastTab with the following fields:

- No.: B C 0 0 0 4 8 8 2
- Name: Pauline Duncan
- Name Details: Salutation Code (MISS), First Name (Pauline), Middle Name
- Address: 4 Meadow View
- Address 2:
- City: Chertsey
- County: Surrey
- Post Code: KT16 8GU
- Country/Region Code:
- Phone No.: 01932 000000
- Mobile No.:
- E-Mail: paulina.drumew@...
- Balance (LCY): 834.82
- Blocked:
- Last Date Modified: 28/11/2016

Below the 'General' section are other tabs: Auction, Communication (01932 000000), Invoicing (EIRE | DOMESTIC), Payments (7D | LATE 5 | 10 LATE), and Foreign Trade. A red arrow points to the upward-pointing arrow on the right side of the 'General' header.

You can promote fields from a FastTab to show on the FastTab header when the band is collapsed. This enables you to view important summary information without expanding the FastTab.

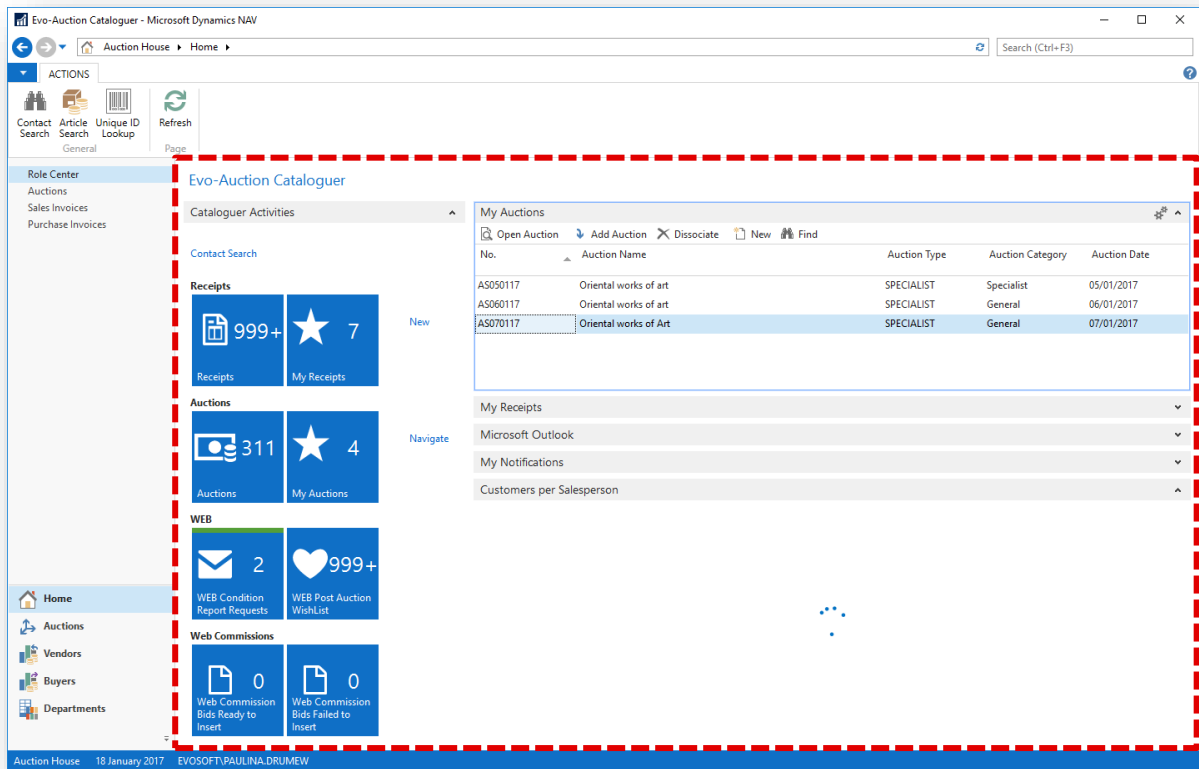
This screenshot is identical to the one above, but with a red dashed box highlighting the phone number '01932 000000' in the 'Communication' section, demonstrating how a field can be promoted to the header.

THE ROLE CENTER

The Role Center is the central point for all information and actions that you perform in Evo-auction. It provides a quick overview of tasks and transactions related to your job role. Additionally, Microsoft Outlook is integrated within the interface. This provides flexibility in being able to work with Evo-auction and Outlook at the same time.

The Role Center can include the following parts:

- Activities
- Outlook
- Charts
- My Notifications
- Lists



My Auctions

No.	Auction Name	Auction Type	Auction Category	Auction Date
AS050117	Oriental works of art	SPECIALIST	Specialist	05/01/2017
AS060117	Oriental works of art	SPECIALIST	General	06/01/2017
AS070117	Oriental works of Art	SPECIALIST	General	07/01/2017

ACTIVITIES

The Activities part contains stacks of documents. These are known as Cues. Select a Cue to open the corresponding list or journal.

The Activities part also shows the default activities that people can perform based on their job role. For example, the Cataloguer Activities that can be performed include creating a new receipt etc.

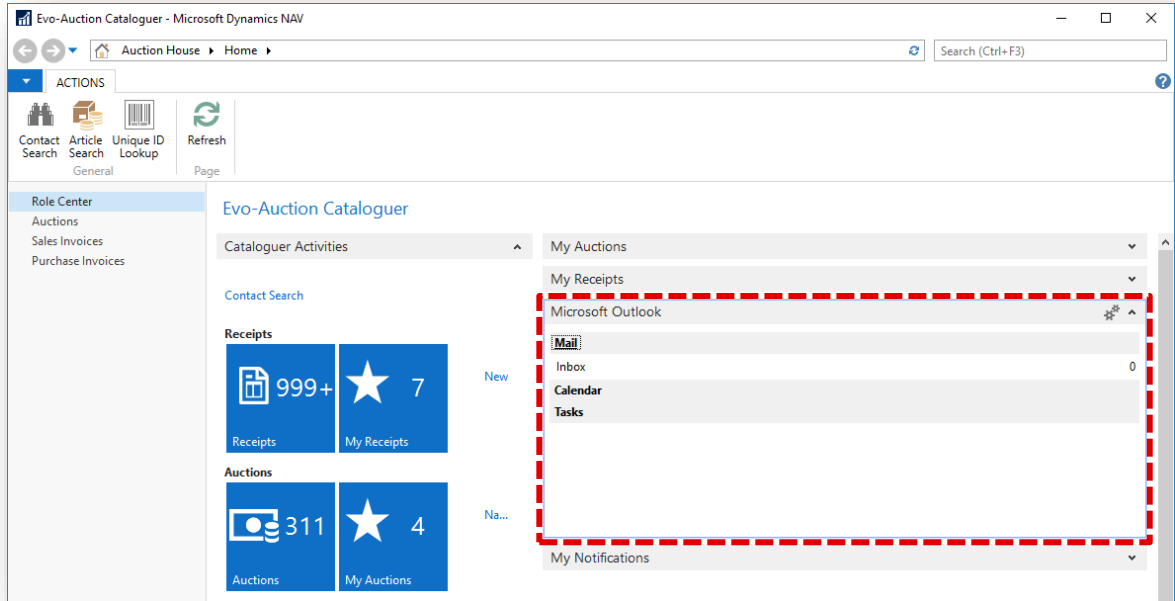
The screenshot displays the 'Evo-Auction Cataloguer' interface. On the left, a 'Role Center' sidebar lists 'Auctions', 'Sales Invoices', and 'Purchase Invoices'. The main area is titled 'Evo-Auction Cataloguer' and features a 'Cataloguer Activities' section. This section contains several cue cards: 'Receipts' (999+ documents, 7 stars), 'Auctions' (311 documents, 4 stars), 'WEB' (2 report requests, 999+ wish lists), and 'Web Commissions' (0 bids ready to insert, 0 bids failed to insert). A red dashed box highlights the 'Cataloguer Activities' section. To the right, a 'My Auctions' table is shown with the following data:

No.	Auction Name	Auction Type	Auction Category	Auction Date
AS050117	Oriental works of art	SPECIALIST	Specialist	05/01/2017
AS060117	Oriental works of art	SPECIALIST	General	06/01/2017
AS070117	Oriental works of Art	SPECIALIST	General	07/01/2017

The bottom status bar shows 'Auction House', '18 January 2017', and 'EVOSOFT.PAULINA.DRUMEW'.

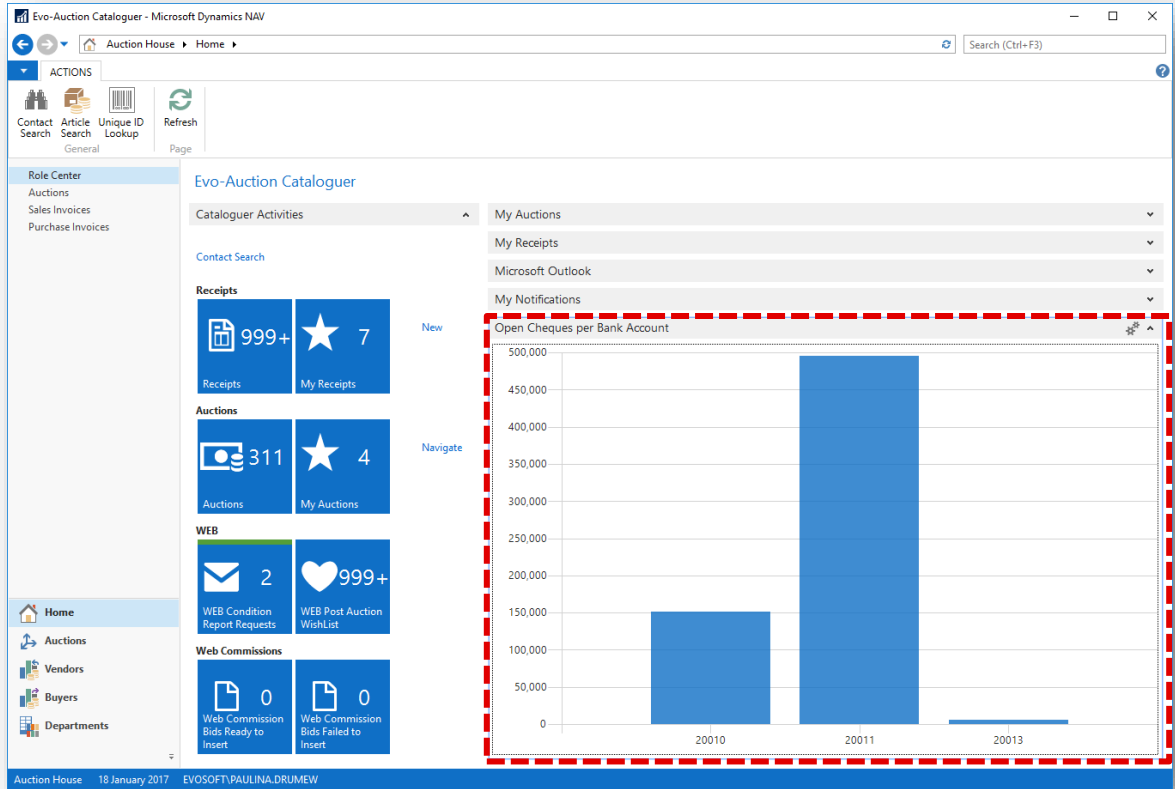
OUTLOOK

The Outlook part provides an overview of your email messages, calendar, and Outlook tasks. You can click an item to open the corresponding folder, email message, or appointment in Outlook.



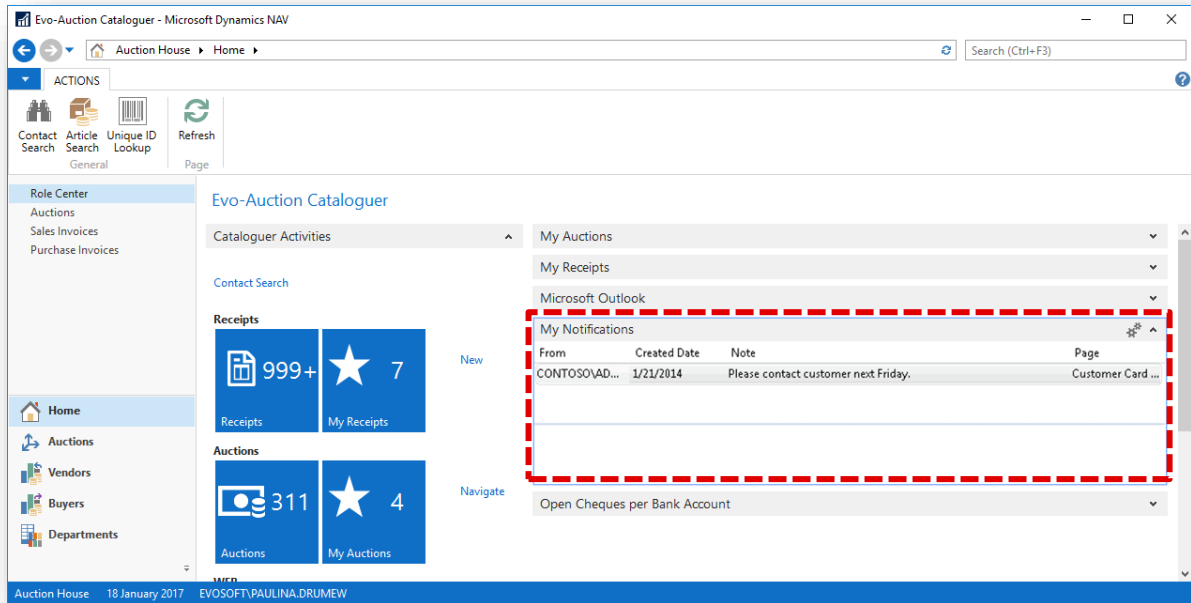
CHARTS

Your Role Center may contain one or more graphs that display information that is relevant to your work. Rest the pointer over a part of the chart to see the related data in text. If you click a part of a chart, you see a list of the records on which the part of the chart is based.



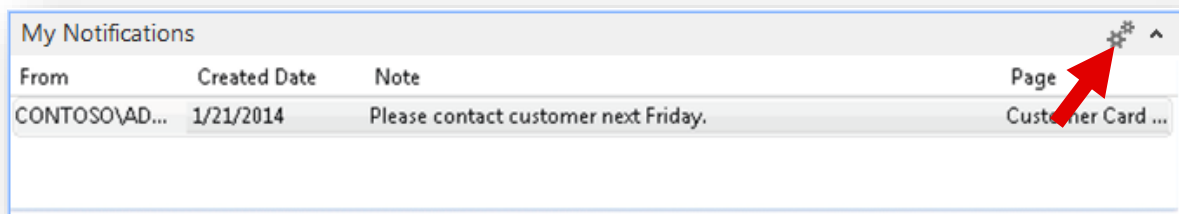
MY NOTIFICATIONS

In the My Notifications part, you can see notes that your colleagues have sent to you. You can click a note to open the document that is related to the message.



From the Actions button, you have the following options:

- Open Page – Open the record that is related to the notification.
- View Notification – View the full text in a note.
- Remove Notification – Delete a notification.

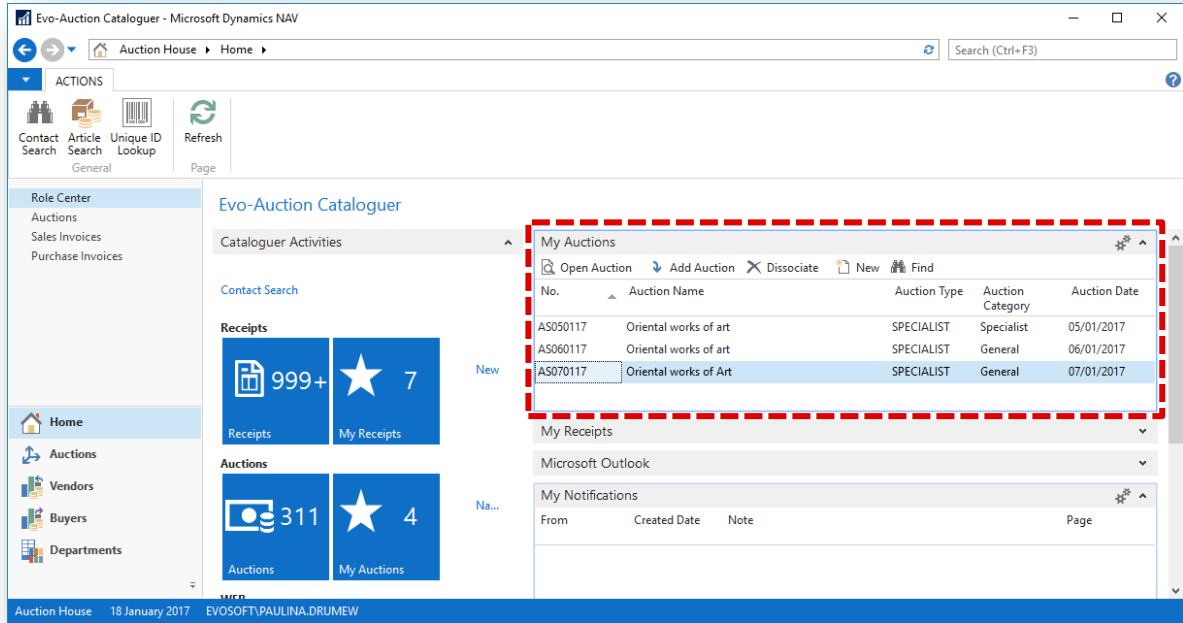


LISTS

Your Role Center may contain one or more lists with for example receipts, auctions, and so on. You can decide which receipt or auction to include on the list.

By selecting a line and clicking Open, you can open the auction header or receipt.

Your user profile defines which lists are available in your Role Center.



The screenshot displays the 'Evo-Auction Cataloguer' application. On the left, the 'Role Center' contains cards for 'Receipts' (999+ items, 7 favorites) and 'Auctions' (311 items, 4 favorites). The main area shows 'Cataloguer Activities' with a 'Contact Search' section. A 'My Auctions' list is open, displaying the following data:

No.	Auction Name	Auction Type	Auction Category	Auction Date
AS050117	Oriental works of art	SPECIALIST	Specialist	05/01/2017
AS060117	Oriental works of art	SPECIALIST	General	06/01/2017
AS070117	Oriental works of Art	SPECIALIST	General	07/01/2017

The 'AS070117' row is highlighted in blue. Below the table, there are sections for 'My Receipts', 'Microsoft Outlook', and 'My Notifications'.

