PASTEL | TRAINING

MANAGING EVOLUTION AGENTS

CREATE NEW AGENTS

1. Click on the **Agents Administration** tab in the main menu or system tree.
2. Select **Agents**.
3. Click on **Add**. The following screen displays.

4. Click on the **General** tab.

Enter your Agent's information. You can add contact details and address details using the tabs at the top.

5. Click on the **Options** tab. This tab allows you to set up the agent's password options, out of the office options and incident options.
6. Click on the **Defaults** tab to set the agent's default settings, whichever applies.
7. Click on the **Groups** tab. This tab will allow you to select the group that the agent is part of.
8. Click on the **Access Permissions** tab. The following screen will appear:

This screen allows you to set up permissions for agents. This will determine what the agents can and cannot access in Evolution per module.

To work in the Access Permissions tab:

1. The left side of the tab shows a tree of functions and permissions. You can open the tree to see the detailed functions. You can click the + button at the bottom to open every branch of the tree, and you can click the - button to close every branch.
2. The right side of the window contains check boxes. Unlike usual check boxes, which are on or off (two states), these check boxes have three states:
3. If the check box is checked, access is on.
4. If the check box is unchecked, access is off.
5. If the check box is green, access is set at a higher level.
3. You set the state of the check boxes through these states by clicking them. As you do so, the check box cycles through the possible states.
4. You work with the Add, Edit, and Delete columns as follows:
5. You can choose per function to enable or disable one or more of these functions.
6. You can enable or disable functions for a set of functions at once by using the check boxes on the heading nodes. All levels below the level you set will change, and you can then edit the lower levels individually. For example, to disable all master file creation for all general ledger master files, use the check box on the General Ledger heading line.
7. If you enable even one function below a heading, the heading will show as enabled.
5. You use the check boxes in the Access column to set individual elements not related to the other three columns. You can use the check box at the module name access to enable or disable access to these elements for the whole module.

The options are:

Add	• If you wish to allow most agents to create new master records in the modules in which they work, check this check box. • If you prevent most agents from creating new master records, uncheck this check box. • In either case, you can modify this access rule per agent group or per agent.
Edit	• If you wish to allow most agents to edit existing master records in the modules in which they work, check this check box. • If you prevent most agents from editing existing master records, uncheck this check box. • In either case, you can modify this access rule per agent group or per agent.
Delete	• If you wish to allow most agents to delete master records in the modules in which they work, check this check box. • If you prevent most agents from deleting master records, uncheck this check box. • In either case, you can modify this access rule per agent group or per agent.

Rule Access (Access)	• In each module, you set rules. For example, you set whether an agent can sell an inventory item below cost. You set rules in the Access Permission tab of the agent or agent group.
	• If you wish to turn on all rules by default, and then disable them where necessary, check this check box.
	• If you wish to turn off all rules by default, and then enable them where necessary, uncheck this check box.

9. Click on the **System Tree** tab. Here you can view the agent's system tree and double check that the agent has the correct permissions set up.
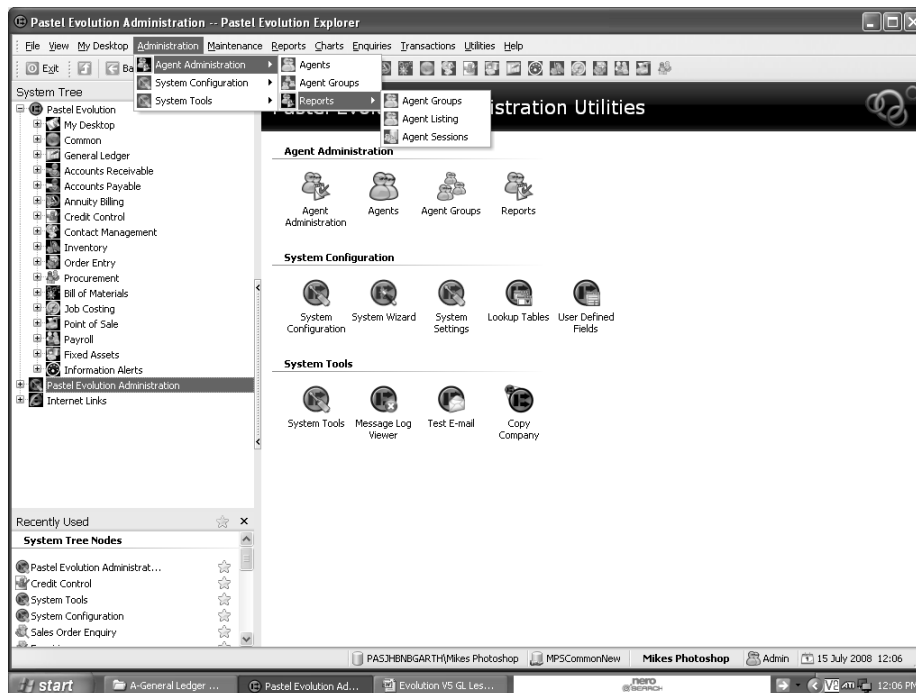
CREATE AGENT GROUPS

1. Click on the **Agents Administration** tab in the main menu or system tree.
2. Select **Agents Groups**.
3. Click on **Add**.
4. Create an Agent Group by entering the details of the group you require.
5. Click on the **Member** to link an agent or various agents to a group.
6. Click **OK** to save.

AGENT REPORTS

To generate Agent Reports follow the following process:

1. Go to the **Administration** tab in the main menu or system tree.

2. Click on the **Agents Administration**.
3. Select **Reports**.

4. The following reports are available:

Report	Contents
Agent Groups	This reports details the different agent groups you have set up in your system.
Agent Listing	This report lists all the different agents that use or have access to the system.
Agent Sessions	This report details the agents that are currently logged into the system.