

UNIT4 ERP

Introduction to the System

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Logging onto the systems

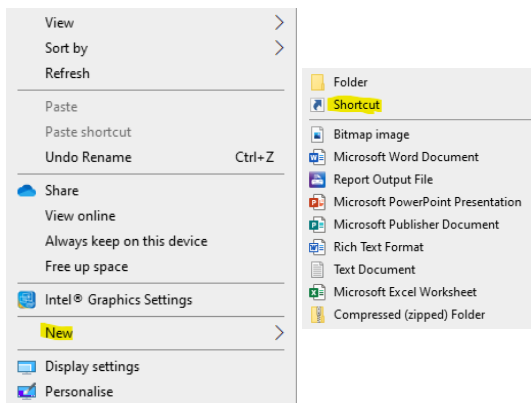
You would have received your username and password from the Systems department, if you haven't, please contact your line manager who will make arrangements to get you set up on the system.

In order to access Unit4, you will need to open Microsoft Edge and go to the following web address:

http://u4bwweb/U4BW_Web

Creating a Shortcut for Unit4

1. To create a short cut for Unit4, go onto your computer desktop and right click on an empty space.
2. Hover the curser over new and click on Shortcut from the list



3. Enter the web address (above) in the location box and press next

Type the location of the item:

4. Call the short cut UNIT4 Web and press finish.

Type a name for this shortcut:

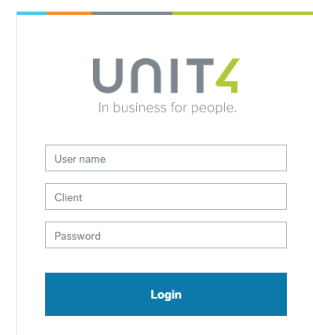
The short cut will appear on your desk.

Logging onto Unit4

Once you have opened your Unit4 shortcut, the log in screen should appear

1. Enter the username you received from systems (starts with an f) – make sure you enter your username in lowercase
2. Enter CC into the client
3. Enter your password and press login

If the following box appears, please press 'No' – selecting 'Yes' will cause issues when you're prompted to change your password every 122 days.



Do you want to update your stored password for u4bwwebdev?

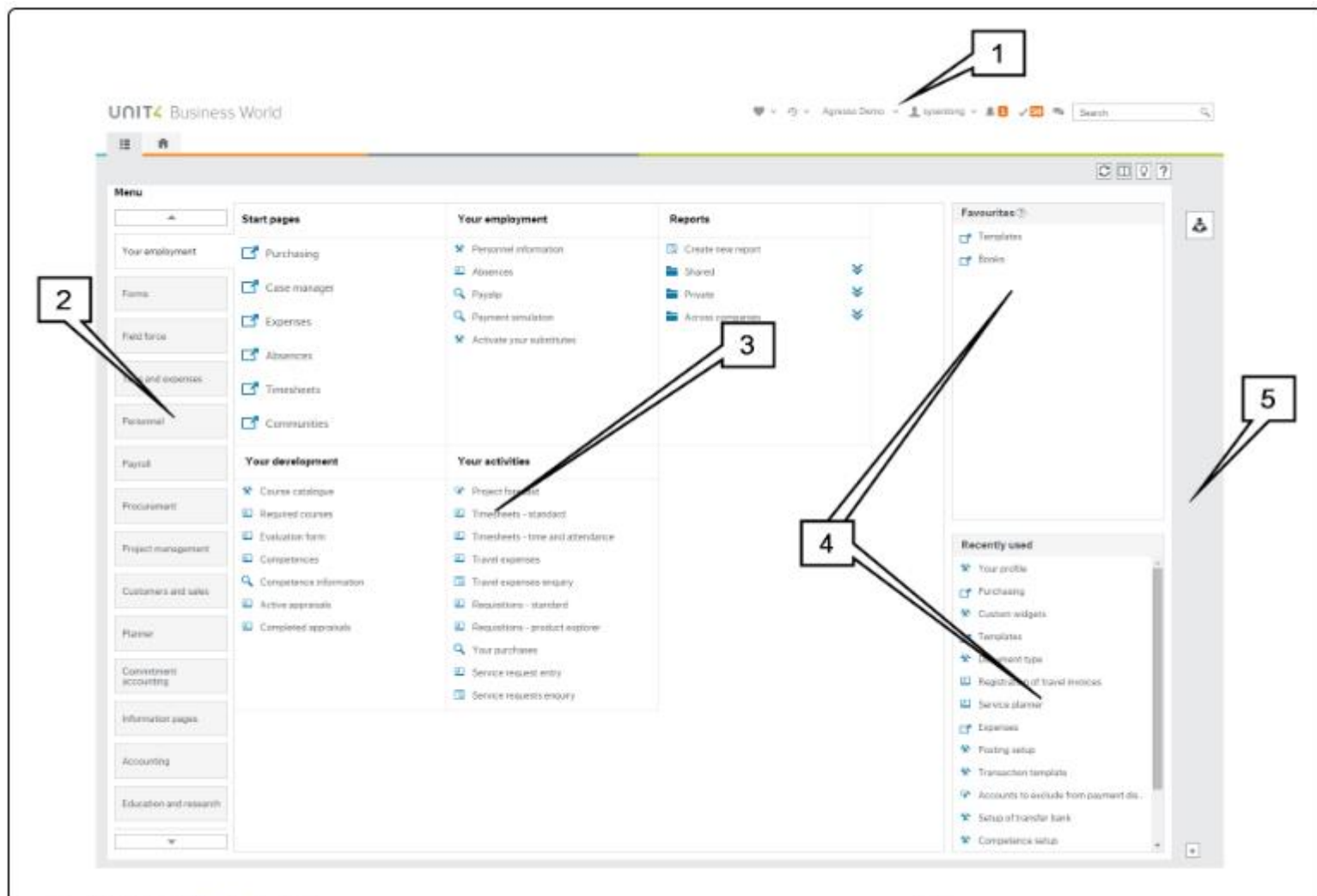
Yes

No

×

Workspace Functions






When you log in, the Unit4 workspace will always be the first screen that you see.




The workspace contains the following elements:


1. The application header containing items such as the Action menu and notification and task lists.
2. The main menu which displays the menu buttons for the available modules such as Time and expenses and Personnel.
3. The main view area which displays the available menu items for the selected module, or the open activities such as Expense entry or Timesheet entry and where you will perform your main tasks.
4. Favourites and Recently used panes.
5. Widget panel. Any widgets available will appear here.

Application Toolbar

Element	Description
 (Favourites)	Lists the activity steps which you have marked as favourites.
 (Recently used)	Shows your recently opened items in the order you used them.
Agresso Demo Corp. (Client menu)	Show the client currently logged on to and opens to show the available clients.
ian (Action menu)	Allows you to configure settings, logout and change the client you are working on.
 (Alerts)	Shows all alerts.
 (Tasks)	Shows all your current tasks. You can open individual tasks from this list or, if Task management is available, open the Task list window where you can create and manage tasks.
 (Collaboration)	If the Collaboration tool is installed then you can open the Collaboration panel to allow you to chat with other Unit4 ERP users.
<input type="text" value="Search"/> (Search)	Allows you to search through the menu to quickly find a window.

Adding and Removing from the Favourites List


To add an activity to your Favourites list, simply open the activity and click on the  icon in the activity toolbar. The icon then changes to red, and the activity is listed in the Favourites pane on the main menu (4) and in the Favourites list.

You can remove an activity from you Favourites by clicking on the  icon when the activity is open.


Searching with Unit4

A powerful search function allows you to search for activities, files or records throughout the entire application.



To search, simply enter what you want to search for in the search bar and click the  to run the search. The returned search results are displayed in the search window and are ranked according to relevance.

Tasks

Your open tasks are indicated by the Tasks icon in the application header and the number of open tasks is shown in the badge .









When you click on a task it is opened in a new activity window where you can take the appropriate action (such as approving an invoice).

Activity Menu

The activity menu appears on the top right-hand side of the activity window.

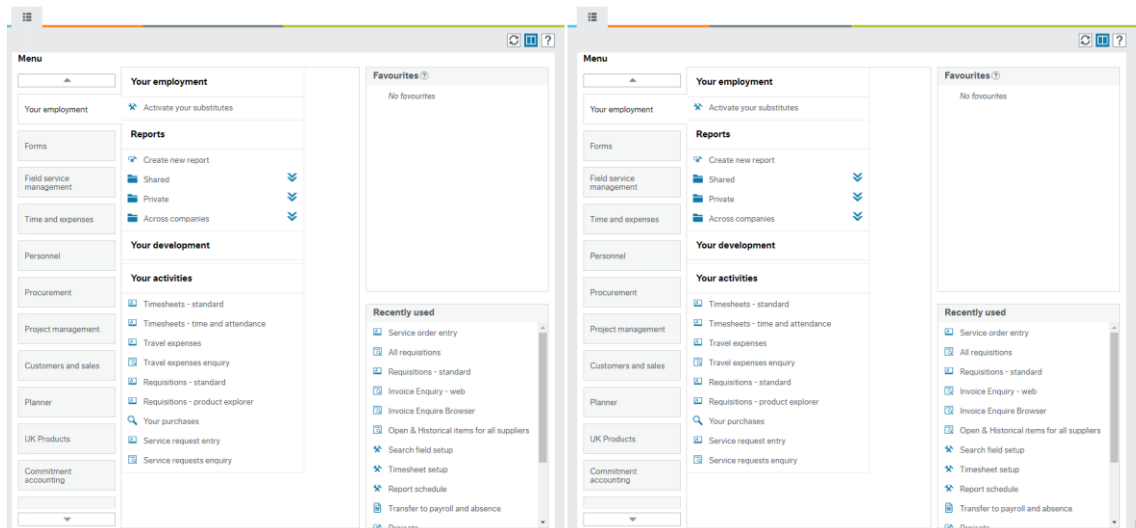


What is shown on the activity menu depends on the type of activity. The following items can appear:

Activity menu item	Description
	Refreshes the menu tree and is available when in the top menu of the application or an individual module.
 (Split view)	Splits the window vertically into two equal parts allowing you to open two activities side by side. which can be useful if you want to, for example compare two activities or .
 (Pinned conversations)	If available for the activity, allows conversations to be pinned to the activity allowing easier online collaboration.
 (Open documents)	If any documents are associated with the activity then this icon is active allowing you to open them etc.
 (Knowly)	If the optional Knowly Experience pack is installed then this icon appears in the activity toolbar allowing you to pin notes to the open window and share this information with other users.
 (Mark as favourite)	Lets you make an activity as a favourite and this allows you to access it more quickly from the Favourites list on the main menu and in the toolbar.
 (Window options)	Opens the Window options pane which allows the activity to be customised. Note that this icon is only available for users with the correct access (super users and system administrators).
 (Help)	Opens the online help for the currently viewed activity.

Split View

You can split the viewing area by simply clicking the Split view icon on the activity toolbar menu. The icon is subsequently activated to show that the view is currently split. The viewing area is then split into two equal parts, and you can open a separate activity in each half of the split view.

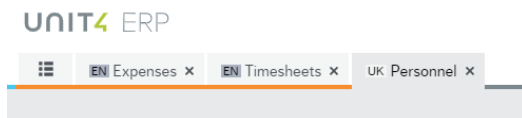


You can resize the split view horizontally by hovering the mouse over the divider until the resize handle appears and then dragging the handle either left or right as required.

To return to a single view, click on the activated split view icon and the view returns to a single view and any activities that were open are kept open and appear in the activity tabs.

Activities and activity tabs

When you open a menu item it opens an activity which is shown in the main area of the window. You can open several activities at a time, and these are shown as tabs in the application header. Each tab shows the client (e.g. CC for Carmarthenshire CC) and the name of the activity as shown below.



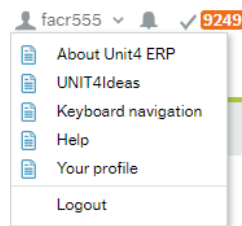
You can easily switch between activities by clicking the tab of the activity you want to work on.

To close an activity, simply click the **X** icon.

Changing your Password

Your initial password would have been supplied by the Systems department. It is recommended that you change the password to a password of your choice when you first log in, or if System ever reset your password on your behalf.

1. On the application toolbar, select the dropdown arrow against your username and open *Your Profile*



2. The *Your Profile* activity tab will open. Press the *Change Password* button that is towards the bottom of this page

Your profile

Settings Personal alert setup

Email

Primary e-mail
ACReynolds@carmarthenshire.gov.uk

Application start page

Module Start page

Document archive

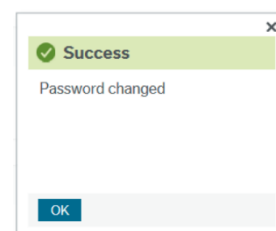
Open in new window

Change password

3. In the pop up screen, enter your current password in the old password cell
4. Enter your new password in the new password and verify new password cell

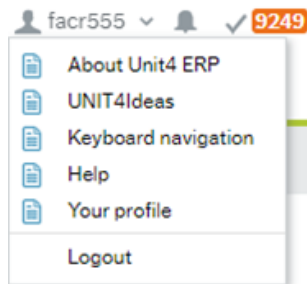
Your new password must be 8 digits long contain 1 uppercase, 1 lowercase and 1 of the following special characters; @#*!\$%?=~^+

5. Once you press Change password, if successful, the following message will appear



Logging out of Unit4

To log out of Unit4, go to the application toolbar and select the dropdown arrow against your username and press log out.



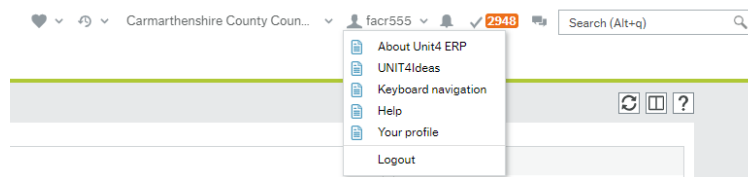
Clearing the cache

Some areas of the system store data to enable quicker retrieval of data in future. This is known as the cache. This can lead to issues at times when changes are made by system administrators as the web version of the system will continue to display the old data/fields.

If a change has been made on Unit4 ERP (Agresso) by the Systems section and you cannot see this change yet, you may need to clear the cache to fix this.

By clearing the cache, the system will then 'talk' to the updated database and retrieve the latest data available. This can be done by using the following the steps.

1. On the main menu's toolbar, expand the drop down by your username and select **About Unit4 ERP**



2. Press the Clear the Cache button.



Note that you might need to log out and back in for changes to take place.

Access Queries

Please contact the systems department for any issues regarding accessing Unit4

CRFinanceSystems@carmarthenshire.gov.uk