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# Welcome to ESO9

This document aims to summarize and explain the basic principles of ESO9 applications. It is designed for new users of ESO9 system.

## Summary

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## 1. Application

The ESO9 application consists of database, application web and application server.

- The database contains all data, code classifiers and all the functions and procedures working with data.
- The application web is a set of graphic models through which the data is displayed to a user. On each workstation client component is installed. This component provides web and database connections.
- Application Server is the core technology of ESO9 applications. It is installed on the server.

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## 2. Application Database

Each ESO9 application works with its application database which contains:

- Tables (code classifiers and application data) and relations between them
- Views
- Procedures and functions for data processing
- Report definitions

The database model was designed to optimize the amount of data. It consists of many **data tables** and many **relations between the data tables**.

(E.g. There is always one supplier related to one invoice. This fact is realized by relation between the table "Document header" and the table "Subjects").

**The view** is the way to display together the data recorded in several tables and to display only those information of each table that are needed in the moment.

(E.g. invoice header – the view contains data from the table "Document header" (voucher number, date of issue, data of payment, constant, variable, etc. symbols, amount to be paid, VAT, ...), from table "Departments" (codes and names of the CREDIT and DEBIT sides), table "chart of accounts" (codes and names of CREDIT and DEBIT accounts), the table "Subjects" (code, name, address, bank account) and others.)

**The majority of processed data are evidences of different kinds of document = vouchers.** (Invoices, stock receipts, bank statements, cash receipts, etc.)

Each document (voucher) of each evidence has one header and zero or one or more items.

All **document headers** of all evidences are recorded together in only one table. And each record (=each document) contains an identifier of its kind. The kind defines the role and the behavior of each document in the whole system.

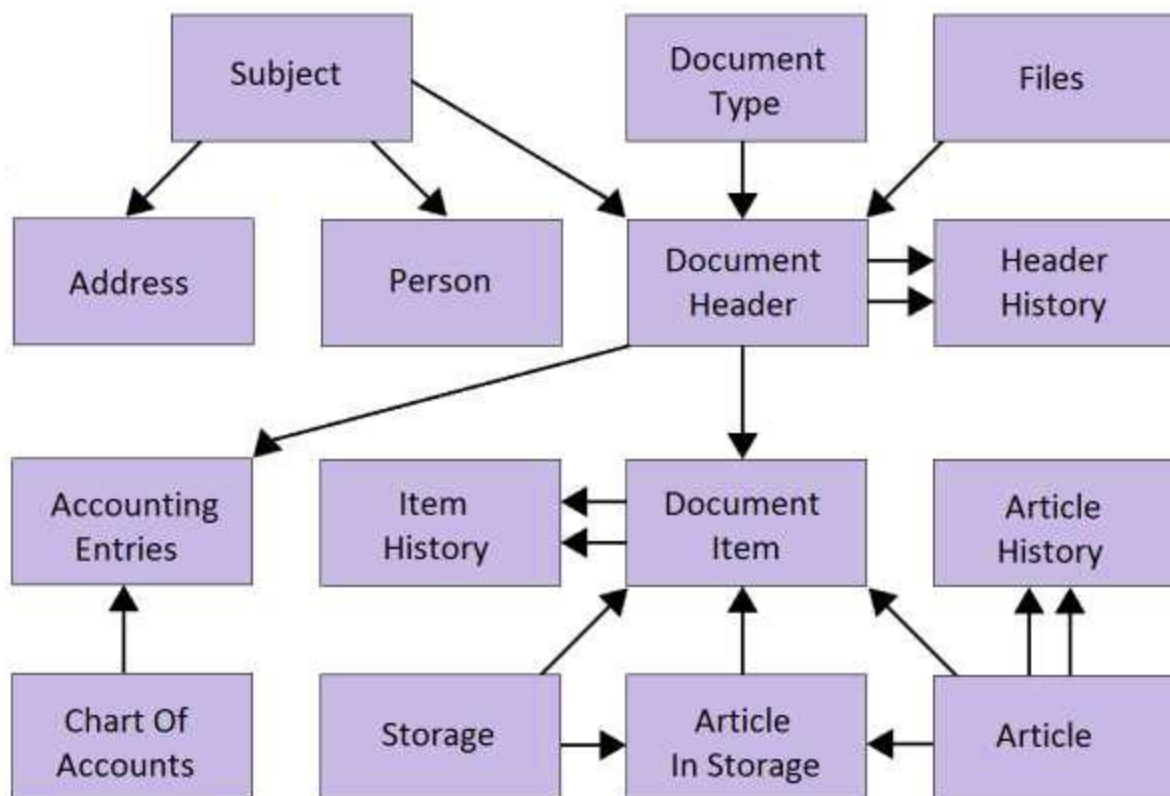
All **document items** are saved together in only one table. Each item record must be related to one header record. The items specify the description of service or good – code, quantity, unit price, total price, etc.

Some documents are **accounting documents** (e.g. invoice) and some are not (sale orders). This characteristic is common to all documents of one kind.

Records in the table “**Accounting entries**” are automatically generated for each accounting document. They are related to document header. The rules how accounting entries are generated are set up during the process of system implementation. They are different for different kinds of evidence.

This database model of one table of document headers, one table of document items and one table of accounting entries is advantageous for reporting.

## 2.1 Basic tables of the database model:



## 3. Two other databases

To each ESO9 application belongs not only the application database but two other databases: document database and log database.

Document database is a database of files (.doc, .pdf, .jpg, etc.) that can be related to a record in the application database or not.

E.g. a sale order sent by your client by e-mail will be related to a record of sale order evidence. But a document describing internal rules of your company is not related to any record of any evidence. Document Management System is a part of ESO9 application.

## 4. How to work with ESO9 application

The screen is divided in 2 frames and a menu above the two frames.

### 4.1 Top menu

**Application name:** link opens the page of Events.

This page is used for a quick overview about the actual situation of the company, user's day tasks, system actualities and others. New events can be defined and can be appropriated to one user or group of users.

**User name:** link opens user's home page.

**Current date:** link allows the user to change the day. It changes the date only for current user and only during one session.

**Activities:** Close and open the left frame (activities)

**Visited:** all activities opened by user are remembered during one session so that he can easily change activity. His position and not-finished work will not be lost.

**Full-text search:** in tables: Subjects, Document headers, Document Items. Full-text search is also accessible in activity 6.4.1.2

**Help**

**Client cache deleting**

**Log-off**

### 4.2 Left frame - List of operations

The whole system functions are accessible to users via **operations**.

Users are organized in groups describing their working position. Operations used by each group are assigned during the system implementation.

Each operation has its number. (Useful to identification of operation user is talking about.)

The operations are structured in hierarchic groups. The groups can be opened and closed.

The user can define his favorite operations. Useful when his list of operations is really long.

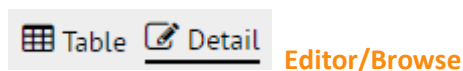
## 4.3 Right frame - working area

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## 5. Watching, inserting, editing data

Page related to the data presents them in a **form**. There can be one or more forms on the page.

### 5.1 Icons in the form



To change the way records are presented to user. In both of them user can accede to same functionalities.

Shortcut: F8. Browse to editor can be switched by double click.



Opens a dialog for define parameters of search:

- Searched value
- Field to search in
- If search only for records where the searched field begins by given value or records where given value is anywhere inside the searched field.
- If activate the filter according to searching.

Shortcut: CTRL + F



Filter dialog can open automatically when user opens the operation or it can be opened by user.

Active filter is indicated by an icon of filter (top left in Browse, down left in Editor)

Shortcut: CTRL + G

There are four tabs in the filter:

### **Tab Basic**

Dialog contains all fields of the form. User can fill in one or more of them (relation AND).

For filling in filtered value special symbols can be used:

Symbol	Meaning
%	any characters (replaces one or more characters)
_	any character (replaces one character)
[A..Z] or [0..9]	interval or list of filtered characters at the position
[^]	interval or list of filtered characters is not at the position

For every field there is an operator. Use mouse to change the operator.

Operator	Meaning
~	like
!~	not like
=	equal
>	bigger than
<	smaller than
>=	bigger or equal
<=	smaller or equal
<>	not equal
X	is Null (empty)
!X	is not Null (not empty)

Filter is activated by **button Filter**.

Filter can be sometimes activated empty (without values). Attention, the result are all records – this can slow down the system! For many operations empty filter is not allowed.

**Button Insert** opens empty form, ready for inserting new records. Only newly inserted records will be shown.

**Button Delete** cleans all filled fields and settled operators in the filter dialog.

### **Tab Extended**

For experienced users. Filtered fields and values can be added one by one, all operators can be used.

### **Tab Manual**

For experienced user and system administrators. SQL definition of filter. Relation OR can be used.

### **Tab Configurations**

See chapter “ Configuration”



### Refresh data

When user opens an operation, he can see the data records existing at that moment. During the time he works in the operation, a new data can be inserted or existing data can be updated by other users. To see actual data user must use this icon.



### Configuration

Configuration is a set of characteristic of a form. Configuration contains:

- Definition of displayed columns in Browse and their order, definition of displayed fields in Editor
- Sorting
- Filter

A configuration is saved with a name - title. There can be several configurations defined for one user and one form.

A configuration can be accessible for only one user or it can be for all users. One configuration in the form can be chosen as default configuration for one or all users.

Shortcut: CTRL + U

Configuration dialog gives to user a possibility to set up one of saved configuration.

Only dedicated users are allowed to define and save new configurations.



### Print data copy

TXT output – copy of displayed records.



### XLS data copy

XLS output – copy of displayed records.



### Saved reports

Dialog shows a list of reports that were created for the operation by dedicated users and system administrators. Every user can print them.

### Help

General description of the system. Not accessible in English.



## 5.2 Buttons in editor

Arrows, Save, Insert, Cancel, Delete (depends of user authorization), Menu

### 5.2.1 Button “Menu” in the form

Menu is accessible or by button “Menu” in Editor, or by right mouse button in Browse.

#### Change sort

Dialog to choose fields for sorting. More levels are possible.

In browse also can be done by double-click on the column title (CTRL + double-click for more levels).

#### Create row copy

Accessible only for dedicated users and system administrators. To insert a new record as a copy of existing one.

#### Mark row

To select and mark records for an action.

User can mark one record (double-click or CTRL + Z in browse, CTRL + Z or cross-field on left bottom corner of editor) or all records (ALT + Plus).

User can invert his selection of marked records.

Marked records can be printed, summarized, deleted (is authorized).

#### Configuration

In the submenu there are functionalities to create and define configuration, establish security rules, view technical information. Some items are accessible only for dedicated users and system administrators.

#### Reports

- print TXT output – copy of displayed records
- define new reports
- list of reports that were created for the operation by dedicated users and system administrators. Every user can print them.



## 6. Shortcuts

Data actualization		
	Browse	Editor
How to move		
Previous record	arrow up	button < or ALT + J
Next record	arrow down	button > or ALT + K
Previous page of records	PAGE UP	---
Next page of records	PAGE DOWN	---
First record	CTRL + PAGE UP	button << or ALT + I
Last record	CTRL + PAGE DOWN	button >> or ALT + N
First column (only in browse)	HOME	---
Last column (only in browse)	END	---
Move inside the record	arrow right or left	TAB, Shift+TAB – through all fields and links
		Enter, Shift+Enter – only through editable fields
Previous form on the page	ALT + PAGE UP	ALT + PAGE UP
Next form on the page	ALT + PAGE DOWN	ALT + PAGE DOWN
First column of first record	Ctrl + Home	---
Last column of last record	Ctrl + End	---
Display info about the record	Ctrl + I	Ctrl + I
How to edit		
New record	button INSERT	ALT + V
Save record	When quit record by arrow up or down, HOME, END	ALT + U
Cancel editing record	ESC	ALT + S
Delete record	button DELETE	ALT + Z
Write into field	directly	directly
Edit field	F2	directly
Drop-down fields	F2 + arrow up or down – choosing new value	arrow up or down – choosing new value
	F2 + letter – choosing value by first letter	letter – choosing value by first letter
	F2+ ALT+ arrow down – menu opens	ALT + arrow down – menu opens

Day fields	Alt + Q – calendar or calculator	Alt + Q – calendar or calculator
	ENTER: insert date from calendar	ENTER insert date from calendar
	SPACEBAR: insert today’s date	SPACEBAR insert today’s date
Classifiers	F12 – open	F12 – open
Special actions		
Local menu	ALT + M or menu key or right mouse button	ALT + M or button Menu
Data refresh	ALT + F5	ALT + F5
Help	F1	F1
Switch BROWSE/EDITOR	F8	F8
Find record	CTRL + F	CTRL + F
Open filter	CTRL + G	CTRL + G
Change sort	CTRL + S	---
Record copy	CTRL + K	CTRL + K
Mark / Unmark record	CTRL + Z	CTRL + Z
Mark all records	ALT + plus	ALT + plus
Unmark all records	ALT + minus	ALT + minus
Previous marked record	CTRL + arrow up	CTRL + arrow up
Next marked record	CTRL + down	CTRL + arrow down
Configuration	CTRL + U	CTRL + U
TXT data copy	CTRL + J	CTRL + J
Action menu	ALT + C	---
Sum of column	CTRL + A	---
Actions in data outputs and reports		
Print dialog	CTRL + T	
PIVOT table configuration	CTRL + U	
Actions in “Visited”		
Link on the module name	Start page of the module	
Cross at the module name	Close all operations in the module	
Link on the operation	To the operation	
Cross at the operation	Close the operations and all sub-operations	
Green arrows	To the operation with data refresh	
Filter icon	To the operation with filter	