**The Menu Pane**

This shows the current active module. Clicking on will hide the menu giving more screen space.

- **Expand all**: shows all screens in the folders.
- **Collapse all**: show only the folders.
- **Home**: returns you to your home (shortcuts) screen.
- **Help**: shows the generic Agresso help index.

**Menus**: The expanded folder and screen options. The icons represent input and enquiry screens.

- **Refresh**: To go to the Home (or Start) screen.
- **Logoff**: Log off Agresso Self Service.

**Modules**:
- **My Tasks** – Tasks for approval/rejection/action.
- **Reports** – Area specific reports to use and export.
- **My Employment** – Holds personal details
- **Time and Expenses** – Out of Pocket Expenses entry.
- **Procurement** – Requisition entry and Receipting.
- **Project Management** – Project costs, billing and resources
- **Customers and Sales** – Sales Order/Credit Note entry.
- **Information Pages** – Create your own report page.

Access to modules is dependant on your role.

**The Home (Shortcuts) screen**

The home screen has a shortcut area. You can add a shortcut to any screen by going into the desired screen and clicking on the button in the tool bar.

**Navigation Tips**

- **Use the [tab] button** - to move to the next field after entering data into a field. Pressing [tab] validates the field you have just entered a code into and will (if the code is valid) show the text description of that field.

- **Maximize the screen area** – Press F11 to hide all the browser menu bars. Press it again to bring them back.

- **Never use the Back & Forward buttons** – Self Service does not remember the previous screen you were looking at and you will be logged out. Any data screen you have not saved will be lost.

- **Make your screen icons and text bigger/smaller** – Press Ctrl and using the mouse scroll wheel.

- **Single click only** – when clicking any option/button/folder on the screen.

- **If you have no Start Page set up then both buttons will take you to the Home screen where you can see your shortcuts.**

- **If you have a Start Page set up, Refresh will take you to that page instead.**
Setting your Start Page

Navigate to **My employment → Options → Set Self Service Start Page**

**Set Self service start page (RH)**

You can make accessing a page you use often even quicker by setting a ‘Start Page’. This is a screen of your choice that will be available as soon as you enter Agresso as a default.

Select the **Module** that contains the desired screen and then select that screen from the drop down list. **Save** and you should receive a confirmation: 🔄 Start page is updated.

When you next enter Agresso or refresh you will see your chosen start page on the main screen. If you wish to see the Home screen to access your shortcuts, simply press the 🏡 Home button.

Using Field Help

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**Field Help is important as it is used to find codes for many fields in Agresso.** The following 3 explanations apply to any field where Field Help is used:

1) **Auto Search** If there are only a few possible options they may appear automatically. Just click on the desired option.

2) **Simple Search** Enter a word (or part of a word) into the search field and press **Search**. Agresso will search in all non (T) columns and show the results below.

3) **Advanced Search** Expand **Advanced**. You can now search in a specific column and use wildcards (*) to represent unknown values. The search below looks for any Product codes beginning with 'KZ' and with 'con' anywhere in the description.

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If you get over 100 results you will be asked to refine your search. Be careful when entering more than one word as there maybe a dash, dot or space you are unaware of. In Field Help, less is often more.