



Getting started

Edition 4

Monitor ERP System AB

Getting started

Welcome to Monitor G5! This guide is intended for you who are a new user of the ERP system. Monitor G5 is primarily used as a program installed in Windows. There is also a web client of the program. This is run in a regular web browser or as an app for Android and IOS. In the guide you can learn about the program's user interface, different functions, and also about the web client. It is also possible to download the guide as a PDF file from the start page of the online help function.

Before you start your training in the ERP system and before going live, there are different default settings which need to be controlled and possibly changed. Different basic data should also be registered. If the company converts from a previous generation of Monitor G5 all data will be included, except for certain basic data which need to be registered again. If the company changes from another ERP system to Monitor G5 you can import parts, customers, and suppliers from your old ERP system. The work regarding basic data needs to be performed before you can create inquiries, quotes, different orders, etc.

You find more information about the basic data you normally should register in the *Configuration* guide. It is also possible to download the guide as a PDF file from the start page of the online help function.

In the online help function you can read more about order flows, how to use Monitor G5, and different options. There are different order flows you need to have knowledge of to understand how you work with inquiries, quotes, and different orders in Monitor G5. These Monitor G5 options are purchased separately.



The system administrator must register users and also needs to configure different parts of the system before you can start using Monitor G5.

Login

When you start Monitor G5 a login window is displayed. Select company and enter your user name and password. When you start Monitor G5 next time, the company and the user you most recently entered will be default in the login window.

The login window is also shown if you have logged out of Monitor G5. You log out in the desktop backstage. Using the *Close* button **×** in the top right corner, you close the program.



The system administrator can link your user account in Monitor G5 to your Windows account. This means you will automatically be logged in when you start Monitor G5.

Desktop

The desktop in Monitor G5 is the main window. The user interface is clear and flexible. It contains different menus, tool bars, and functions.

From start, the desktop shows different background images, determined by the color range/theme you have selected. You can also create desktop configurations and fill the desktop with interactive desktop components showing different types of information. You find desktop configurations and color range/theme under the headings *Desktop* and *Settings* in backstage.

You can minimize the desktop window or partially reduce the size of it. If the desktop is minimized or reduced in size you can still see, open, and close procedure windows as usual since these are not locked to the desktop. When you restart Monitor G5, the desktop will be shown in the same size and position, as well as on the same screen, as when you were last using Monitor G5.

At the top of the desktop you find the title bar. To the left on the title bar you find the buttons *Window* (1), *Message center* (2), *Clipboard* (3), and the *Find procedure* field (4). In the middle of the title bar there is a section (5) where you see in which company, database number, warehouse, accounting year, and period, you are working. Your user name is shown at the end of the text section. To the right of the text section there is a help button (6) which opens the start page for the online help function. Next to it there is a field for *Monitor search* (7) which is used to search for records in the entire system.



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In the online help function you can read more about each function on the title bar.

At the top left on the desktop you find the *Backstage* (1) function. In the backstage there are different functions and settings. Next to backstage you find the *Module menu* (2) with a button for each module. There you find all procedures to which you have access.



Backstage

In the desktop backstage there are some general functions and settings for Monitor G5 and you as a user.

Function	Explanation
Settings	Here you configure settings for color range/theme, reminders, printouts, etc.
Warehouse	Here you see and select among the available warehouses.
Language	Here you see and select default language and the current language.
Accounting year	Here you see and select default accounting year and the current accounting year.
Desktop	Here you select layout and desktop components for your desktop.
About	Here you will find information about Monitor G5.
Log out	Here you log out from Monitor G5.







In the topic *Backstage* in the online help function you can read more about the respective functions in backstage.




The Module menu

The module menu contains a button for each module in Monitor G5. When you click a module button you will see a list with all procedures that module. The procedures in the list are grouped in sections according to the table below. If an asterisk (*) is shown, it means that the procedures in that section is part of an option.

The module menu is determined by user rights. If you do not have user right to show any procedure in a module, that module button will not be shown at all. Under the module button you will see the procedures to which you have access in the module in question.

Icon	Name	Sections
	Manufacturing	Parts, Configurator*, Calculations, Orders, Planning, Subcontract, Reporting, Statistics/Follow-up, Work centers, Tools & Maintenance
	Purchase	Suppliers, Inquiries, Orders, Arrivals, Statistics/Follow-up, Accounts payable, Cash flow forecast
	Sales	Customers, CRM, Quotes, Delivery schedules, Orders, Delivery, Invoicing, Statistics/Follow-up, Accounts receivable, Cash flow forecast
	Stock	Parts, Requirements planning, Stock count, Valuation, Statistics/Follow-up, Traceability, Cases, Activities, Calculation, Stock location system*

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Icon	Name	Sections
	Time recording	Personnel, Recording, Authorize/Adjust, Basic data
	Accounting	Chart of accounts/Dimensions, Automatic posting/allocation, Accrual accounting, Stock accounting (Management accounting*), Vouchers, Reports/Follow-up, Projects, Budget, Change of period/year, Fixed assets register*, Create report
	General registers	Basic settings, Economy, Document management, File management, Export/Import, EDI*, Users/Personnel, Categories, Other tables, System maintenance, Agent*, Connections, Customer order transfer*



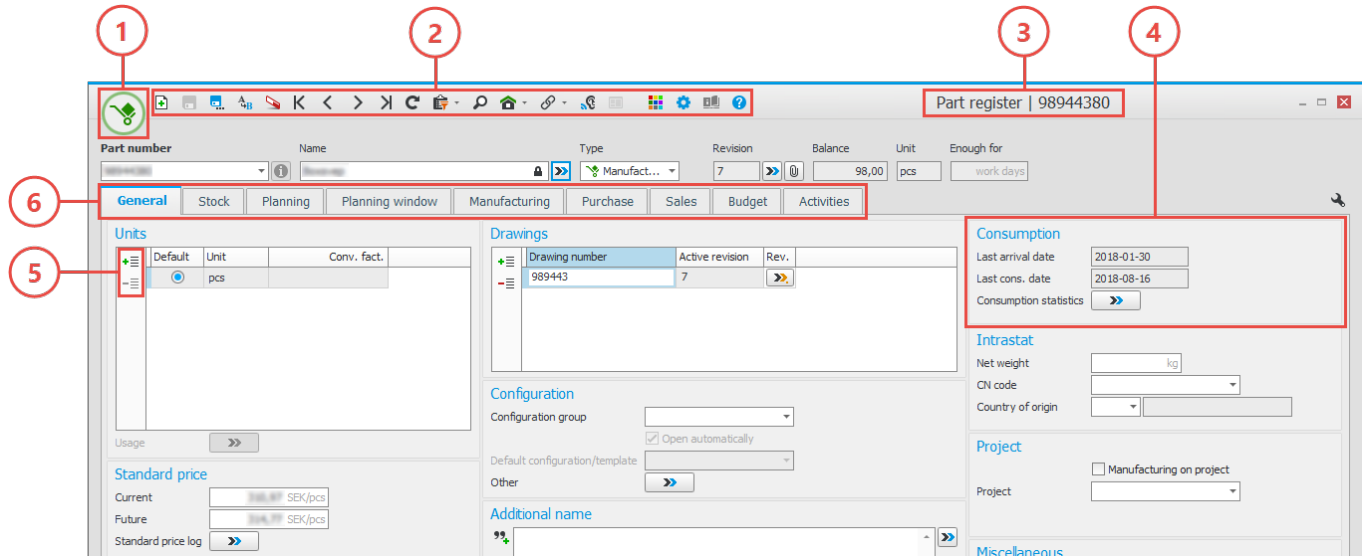
As an alternative to opening procedures via the module menu there is a search field called *Find procedure* on the title bar. This is a find-as-you-type function to find and open procedures.

By using the shortcut key F9 you can open a temporary version of the module menu including the search field *Find procedure*. This function is especially useful when the procedure windows are maximized on your screen.

Procedure window

The procedure windows in Monitor G5 are separate from the main window. You can place them anywhere you want on your screen. If you have more than one screen you can also move the procedure windows between the screens. The procedure windows are adapted for a screen resolution of at least 1280 × 720 pixels (HD).

The procedure windows always contain the following parts: Backstage (1) with different general alternatives and settings for the procedure, Toolbar (2), Title bar (3), Boxes (4) with different contents. A function menu (5) is available in certain boxes. Some procedure windows are also divided into several tabs (6).



There are principally three different types of procedure windows in Monitor G5, single-record procedures, list procedures, and table procedures.

When you close a procedure, the system will remember the size and position of the procedure window until the next time you open the procedure.

Please note! This function is not applicable in the Daily management and customized reports.

Single-record procedures

Single-record procedures are used to register and update one data record at a time. These are data records which contain a lot of information, for example parts, customers, and customer orders. The procedure windows also contains the following sections: Header row (1) with record selector, Status row (2) with information about when the record was most recently modified and printed, Validation window (3) showing warnings and errors, if any, from different validations in the procedure, and the Side panel (4) containing useful information from different registers linked to the data record in question.

The screenshot shows a web application window titled "Customer register | 10". The interface is divided into several sections: "Customer" (top left), "Contact information" (top middle), "Mailing address" (middle left), "Delivery address" (bottom left), "Tags" (middle right), "References" (bottom middle), "Communication" (bottom right), and a summary panel (far right). Annotations 1 through 4 highlight specific areas: 1. The "Customer" dropdown menu and name field. 2. The "Created by" and "Last modified by" fields at the bottom. 3. An error message box stating "1 errors" and "Name Cannot be left empty". 4. The summary panel on the right, which includes sections for "Order backlog", "Invoice basis", and "Invoicing log".

1 Customer Name

2 Created by: Last modified by: ADMIN 2015-04-21 07:51

3 1 errors
Name Cannot be left empty

4 Summary panel (Order backlog, Invoice basis, Invoicing log)

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List procedures

List procedures are used to select and load several data records to different list for printing and reporting. The procedure windows also contain the following sections: List types (1), Presentations (2), Selection rows (3), Settings (4), and Grouping header in lists (5). Some of the lists also have a side panel.

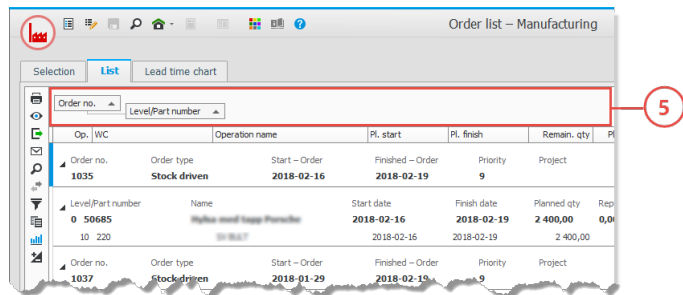
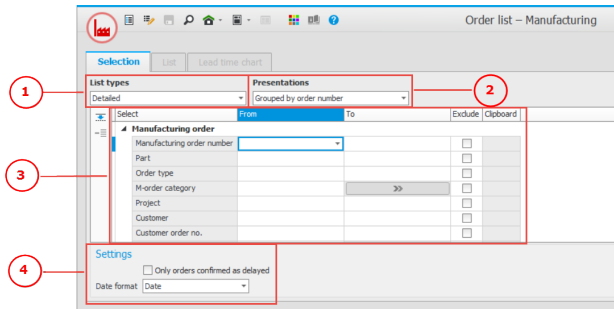
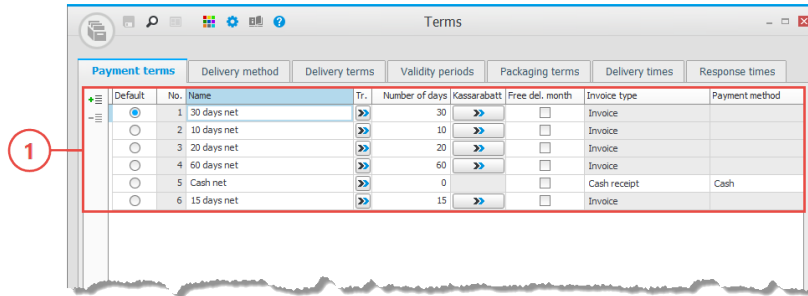


Table procedures

Table procedures are used to register different basic data in a table, for example terms, codes, price lists, and categories. Procedure windows of this type contains one or several tables (1) divided in different tabs.



Subordinate windows

There are also subordinate windows to many procedure windows in Monitor G5. These are modal windows (dialog windows), but also certain boxes and windows found under different buttons. These can be unpinned from the procedure window and then they become floating windows subordinate to the procedure window. Read more about subordinate windows in the online help function.

Backstage in procedures

Each procedure has a backstage with different functions depending on the type of procedure.

Function	Explanation
Side panel	Here you select which components to show in the side panel.
Links	Here you copy hyperlinks to this procedure and record.
Instruction	Here you can create your own instructions for the procedure in question.
Selection rows	Here you choose which selection rows to show under the <i>Selection</i> tab.
Presentations	Here you can create own presentations for different list types.
Settings	Here you can configure settings in BI procedures.
Format templates	Here you can create your own (custom) format templates for import of data from text files in import procedures.



In the topic *Backstage in procedures* in the online help function you can read more about each function in the procedure backstage.

The toolbar

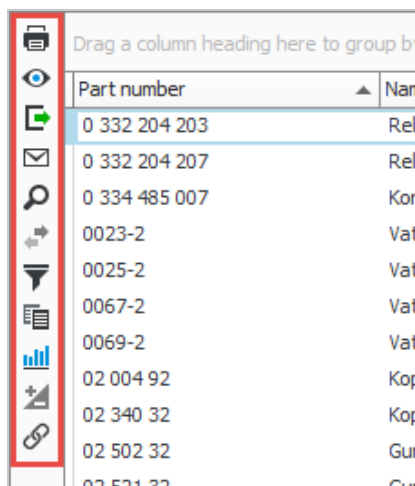
You will find the toolbar in the title bar at the top of all procedure windows. Here you will find buttons with general functions for the procedure in question. The buttons available in the toolbar differs depending on which type of procedure it is. If you place the cursor over a button, the function of the button is shown in a tooltip. In the image below you will find an example of a toolbar.



In the topic *The Toolbar* in the online help function you will find a list of the most common buttons and their functions on the toolbar.

The Function menu

There is a function menu to the left of all lists, selection rows, and different tables in the procedures. This menu contains buttons with different functions. If you place the cursor over a button, the function of the button is shown in a tooltip. In the image below you see an example of how the function menu might look at in a list.



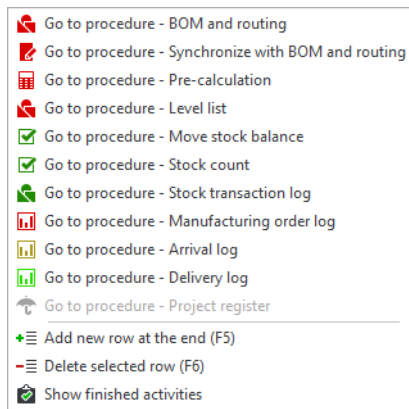
Many of the buttons on the function menu are also available on the context menu when right-clicking for users who prefer to use that menu instead.



In the topic *The Function menu* in the online help function there is a table of the most common buttons on the function menu, also containing an explanation of the function. In the table you also see the shortcut keys, if any.

The Context menu

In Monitor G5 there is a context menu which you open by right-clicking.



The context menu has different contents depending on where in the procedure window you open it. It is available in input fields, boxes, lists, tables, as well as column headings in tables and columns in lists. The context menu can be seen as an alternative to the function menu, for example to link to other procedures.


The context menu can also contain certain special functions. This applies if you open the menu in input fields, lists, column headings in tables, and columns in lists.

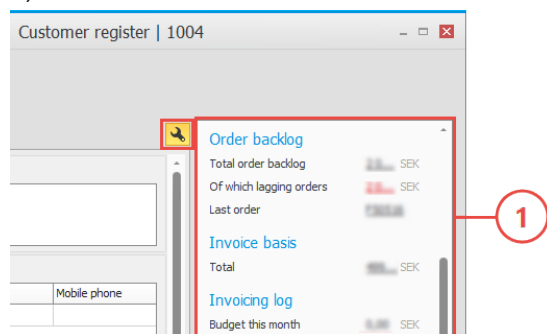


In the topic *Context menu* in the online help function you will find more information about these special functions.

The Side panel

Under *Side panel* in the backstage of the procedure you can add or delete different register components in the side panel in the procedure in question.

You find the side panel (1) in the right portion of the procedure windows. You show the side panel using F10 or by clicking the button *Show the side panel* . When the side panel is shown you can also use the same button to hide it, or F10.



The components in the side panel show information and values related to the record in question in a procedure or to a selected record in a list. Certain values also have hyperlinks to affected procedures so that you directly can see the background information for the specific value.



Under *Settings – General* in the desktop backstage you can configure to show the side panel by default in certain procedures.

General features



In Monitor G5 there are many general features which you can use in the entire system. In this chapter some important general features are described.



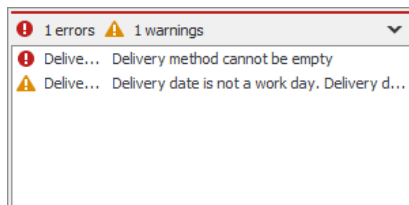
In the online help function you can read more about all general features in Monitor G5.


Data validation in procedures


In all single-record procedures and in all lists and tables which can be updated, the system performs validations of certain fields. The system then checks if data is missing or if the entered data is incorrect. The validation can result in error messages and warnings.

For example, if a delivery method is missing on a customer order the validation will show an error symbol  next to the field. If the delivery date on a customer order row is not a work day or is not one of the customer's recommended delivery days, then the validation will show a warning symbol  next to the field.

If you place the cursor over the symbol, the cause of it is shown in a tooltip. When there are errors and warnings in a field, a validation window will also be shown in the bottom right corner of the procedure window.




The validation window shows all occurring errors at the top and occurring warnings at the end. The causes are also shown. Where there is not enough room for the full cause text you can place the cursor over the error or warning and the text will be shown in a tooltip. If you double-click on an error or a warning in the validation window, the cursor will be placed in the affected field. You can minimize the validation window using the button  if you at the moment do not want to see the information or if the validation window blocks information in the procedure window.

You do not need to correct the error at once, it is possible to go ahead and enter other information. However, you cannot save in the procedure until the error has been corrected. This is made visible as the *Save* button on the toolbar is red and shows an exclamation mark . If warnings exist it is possible to save since a warning is only informing you that the value entered might not be the best to save.

Property management

An administrator (a user with the role *MONITOR responsible* or *System administrator*) can configure properties on different objects in procedures and save this in property sets that in turn can be linked to the user. The objects on which you can configure properties are checkboxes, fields, buttons, and tabs.

The administrator will access the function by using the *Property management*  button in the toolbar of the procedure. When using the button a window opens where the administrator adds one or several property sets as well as select to which users, groups, or roles the property set shall be applied. The administrator configures properties on affected objects in the property set.

Move and hide columns

In lists and tables you can move columns around. It is also possible to hide columns.

To move a column you drag the column heading sideways using your mouse pointer and then you drop it where you want to place it, between two other columns. You are helped by two arrows showing when you can drop the column heading.

To hide a column you drag the column heading from its place and drop it above or below the other headings in the list or table. You are helped by an X showing when you can drop the column heading.

Function keys on the keyboard

Most of the function keys (F1–F12) on the keyboard are used in shortcut commands for central functions in Monitor G5. Read about the shortcut keys in the online help function.

Finished and adaptable document templates

In MONITOR a complete set of document templates is included for different purposes which cover the need of most companies, for example for inquiry, quote, different orders and invoices, as well as different reports. These document templates are finished and ready to be used directly.

If you want to adapt a document template, for example change the contents or layout of the document template, you have the option to create variants of the document template and use a report tool integrated in Monitor G5 for this purpose.

Finished and adaptable list types

There are many list procedures in Monitor G5. The procedures often contain multiple list types which can be displayed using different presentations. List types and presentations are used to for example load data records to a list to show a chart, print, analyze, or update values in records in the database. The list types and presentations included are ready to use. As a complement you can for each list type configure from which columns in a register

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you wish to select data records. You can also create own presentations for list types. This way you can adapt the selection opportunities and complement the list types.

As mentioned earlier you can easily create new presentations for list types. You can then use a standard presentation or start with an empty presentation. A presentation for example determine which columns should be included in the list and which columns to be aggregated, how the list should be grouped and/or filtered.

Built-in calculator in numerical fields

In numerical fields you can write formulas to calculate a value. A formula expression is shown in **red** color if the expression is not correct. If the expression is correct it is shown in **green** color. When you leave the field, the value is calculated and shown in the field. See the image below.

Quantity	Quantity	Quantity
0,40* kg	0,4*20 kg	8,00 kg

Built-in date parser in date fields with calendar

In date fields that have a calendar component, a parser is included for input of dates. This interpreter translates codes into dates according to the table below. When you leave the field, the code is interpreted and shown in the field. For default values in selection rows, these codes can be used to e.g. get the date for a certain day of the week, or to get a date in relation to today's date. When a code is used to determine a date, the date will be displayed in italics as soon as you move the focus out of the field. If you again move focus into the field, the code will be displayed to make it possible to make changes.



The language in the calendar component (names of months and weekdays) is determined by the region selected in the user's operating system.

Code	Explanation
1-7	Day of the current week
01-31	Day of the current month
t	Today's date
m	The first day of the current month
n	The last day of the current month
y	The first day of the current year
z	The last day of the current year



All letter codes can be combined with digits. If you for example type **m-3** the resulting date will be the first day of the month, three months before the current month. If you type **y+2** the resulting date will be the first day of the year, two years after the current year. If you do not type +/- sign, that is if you only type **y2**, it will be interpreted as **y+2**.

Integrated BI

Business intelligence (BI) is integrated in the system and consists of the procedures called *BI – Sales* and *BI – Purchase*. In these procedures you see order inflow, sales statistics or purchase statistics, and different important key figures presented in gauges, charts, and lists.

In the *Settings for BI* procedure you decide from which companies in the system data such as purchase statistics, sales statistics, and order inflow, should be loaded. You also decide how often this should be done.

When activating the *Use alias when exporting to Business intelligence* system setting, the "Alias for BI" field becomes available in various procedures. This is done in order to determine what the data mining data should extract to the BI and if different records should be aggregated in the BI.


You can also create own views from the procedures' backstage.

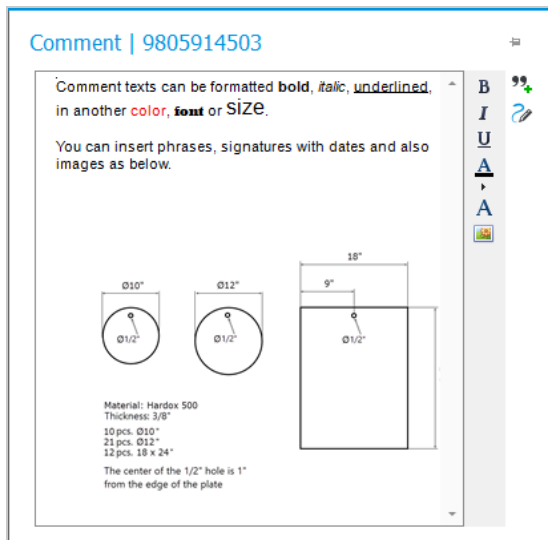
Interactive desktop

The desktop in Monitor G5 is interactive in such a way that you can build your own desktop configuration and fill the desktop with interactive desktop components showing different types of information presented in gagues, charts, and lists. It is also possible to select a finished desktop component created by an administrator. All this is done from the desktop's backstage. On the desktop you can then double-click the components and get detailed information in the related procedures. If you have created a desktop configuration of your own you can also change settings in the components directly on the desktop.



Comments and additional texts


In registration and reporting procedures you can enter different types of comments, instructions, additional texts, etc. for loaded records. Then you will find a small text editor containing functions for text formatting. Besides

writing text, you can also insert images, phrases (from a phrase register), and your signature (consisting of today's date and your user name). You can also unpin the text editor window by using the button  in the top right corner.




By using the drag and drop function you can also drag certain file types from the Explorer in Windows to the text editor. If it is a Word file, HTML file, or text file, the content is extracted and inserted in the text editor. If it is an image file, the image will be inserted.

When a comment exists a filled speech bubble  will be shown on the comment button. If there is no comment, the speech bubble is shown empty .



In most cases it is also possible to link files to the comment using the *Files* button  placed next to the Comment button. Read more about this below.

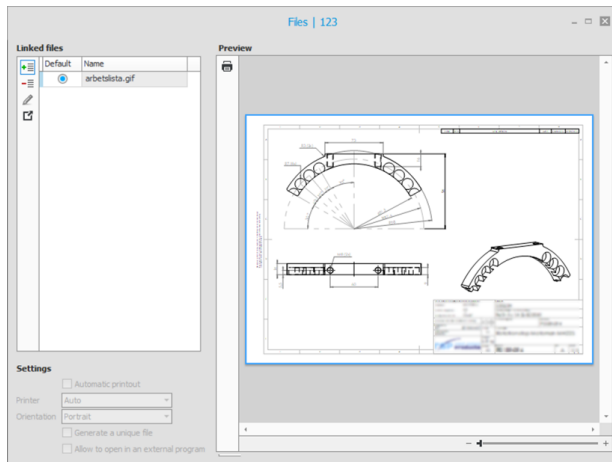
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The text editor is also available on additional text rows (row type 4) on quotes, inquiries, and orders. There you can choose which on which document types the additional text shall be displayed.

Pos.	Row type	Part	Name	T	LSR	Quantity	Unit	Price each	Price alternative	Price com.	Discount	Setup price								
10	1	9805914503	Boxcover		PR	1,00	pcs	93,00 SEK			0,00 %	SEK								
	4	<p>Attention! The Boxcover must be shipped with the bushing part.no. 123-5 (see image)</p>  <p>B I J U A + • •</p> <p>Show on Documents</p> <table border="1"><tr><td><input checked="" type="checkbox"/></td><td>Quote</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Order confirmation</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Delivery note</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Invoice</td></tr></table>											<input checked="" type="checkbox"/>	Quote	<input checked="" type="checkbox"/>	Order confirmation	<input checked="" type="checkbox"/>	Delivery note	<input checked="" type="checkbox"/>	Invoice
<input checked="" type="checkbox"/>	Quote																			
<input checked="" type="checkbox"/>	Order confirmation																			
<input checked="" type="checkbox"/>	Delivery note																			
<input checked="" type="checkbox"/>	Invoice																			

Link files

By using the *Files* button  in registration and reporting procedures, you can for the record loaded also link files as complement to entered comments. This button opens a window where you can link files and view linked files. It is also possible to link multiple files and select which of the files should be the *Default* one. You can *Preview* the file directly in the window if it is in PDF format. The *Open* button  in the window opens the linked file in the program which the file type is associated with in Windows. If you link a file to records such as quotes, orders, operations, and material, you can activate *Automatic printout*. This means the linked file will automatically become printed together with the main document.



The *Extended file viewer* option enables previewing of additional file types directly in the viewing window, for example, different drawing formats and Office files such as Word, Excel, etc. In the extended file viewer you can use the arrow buttons   to browse through a document containing more than one page. The extended file viewer also makes the automatic printout of linked files possible for the mentioned file types and not only for files in PDF format.





It is possible to drag a file directly from for example the desktop or the Explorer in Windows and drop it in the file link window. A dialog window then appears where you can copy the file to one of the registered paths (created in the *File paths* procedure) and then you can configure settings for the linked file.

MONITOR printer dialog

In Monitor G5 there is a built-in printer dialog. This printer dialog allows you to control combined printouts which consist of both documents and linked files in different formats and orientations (portrait/landscape) and that are printed on different printers.

Message center

Under the *Message center* button  on the title bar you can see notifications from the system, chat with other users, and see if there are any tasks for you to undertake.

If you have received a notification, a new chat, or a new task (with today's date as planned date) a red symbol with an exclamation mark will be shown  on the button for the Message center. This is done in order to make you observant of the new activity.

MONITOR search

In the field called *MONITOR search* (Ctrl + F) on the title bar you can search for records in the entire system.

A pattern search is made of the text you type. If you for example type "123" you will get hits on all records containing "123" regardless of if it is an order number, blanket order number, part number, customer number, account number, etc. You can also search for records in a certain register by entering the register name (in English) and a colon as a search phrase before what you are searching for. For example, to search for "123" in the customer order register you type "customerorder:123".


MONITOR-to-MONITOR


MONITOR-to-MONITOR will facilitate your communication with customers and suppliers who also use MONITOR.

If you for example send a purchase order via e-mail from MONITOR to your supplier, then the order is attached both as PDF and XML in the e-mail message. The e-mail message also contains information regarding what is attached, in this case a purchase order. The supplier then uses the received e-mail to automatically register it as a customer order in their MONITOR system. The supplier can then send an order confirmation back to you with e-mail and you can then use it to order confirm the purchase order in MONITOR. The supplier can also send you the customer invoice via e-mail and you take that e-mail to register it as a supplier invoice.

Online help function

In Monitor G5 you easily open the online help by pressing F1. Then a help topic is shown for the section where the focus is, for example where the cursor is placed in a field in a procedure (so-called context sensitive help). On the help page there is a description of the selected section. There is also a side menu on the help page with links to other help topics in the procedure.

You open the online help for an entire procedure using Shift + F1 or by clicking the help button  which you find on the title bar in all procedures.

To go to the start page for the entire online help, click on the help button  you find on the title bar in the program window next to the search function called MONITOR search. You can also click the logotype Monitor G5 in the header or in the footer to get to the start page.

There is a powerful search in the online help function. Read more about [searching in the online help function](#).

In the online help function you can navigate by using your keyboard. Read more about [keyboard navigation in the online help function](#).

Language management

Languages in Monitor G5 exists on several levels. There are different languages you can show/use in the program. These can be selected and can also be configured as default for users. A user can then change between different languages to show in MONITOR. There is also a company language which is selected during the installation. This is the language used to show basic data included in the database. Finally there are also the languages which you can register in the *Languages* procedure and which are selected for countries in the *Countries* procedure. Country can in its turn be selected for different addresses in the company, for customers, and suppliers, and it determines which language will be used by default for each address.

Data which is possible to have in different languages can also be translated. This applies to names, descriptions, explanations, etc. of different types of records. The translations are used on external documents such as purchase orders, order confirmations, and invoices.

A basic principle is that all data shown to the user, e.g. fields in different procedures, should be possible to see in the user's language. If the data is not translated, it will be shown in the company language.

Phrase on documents (headings) can be translated into different languages in the *Document texts* procedure.

Lookup in large registers

In large registers such as for example the part register and different order registers, there is a powerful search function to use to find and load records in the register. The function is called *Lookup*. Using this Lookup feature you can browse for records, make pattern searches, and view your most recently loaded records from the register. Here you can also create Lookup presentations. There you enter which columns in the register you wish to search in, and/or you add filters with selections of different types of records that should be possible to search for.

Find procedure

In the field *Find procedure* (Alt + D) on the title bar there is a find-as-you-type function you can use to find and open procedures. This is an alternative to looking for procedures in the module menu.

A pattern search is made of the text you type. If you for example start typing "ust" you will get hits for the procedures containing "ust" in their names, such as *Customer register* and *Price adjustment*, etc.

Updating in lists

In many lists in MONITOR it is possible to update data by modifying values directly in the lists and save to the database for the records in question. You can also use the *Find & replace* feature in lists to change all values in a certain column. This is very useful when you perform mass updates of records in the database.

Clipboard

The *Clipboard* function is in the title bar and it is a table which can contain different temporary data records which you copy from lists to reuse as a clipboard in selections for other lists. The purpose of this is to make it possible to do further data processing of a certain selection of data records.

Changelog and print log

In all procedures which can update different records, a log entry is always created when a record becomes modified. Modifications on field level are saved in the changelog with information about the value before and after the change, when the record was changed, and by which user.

In procedures where you can print documents a log entry is always created when a printout is made. The printout is saved in the print log as is was at the time of the printing together with information about when the printout was

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made and by which user. Regardless of what has changed after the printout was made you can therefore at a later time still see what the initial printout looked like. The printout log is also used in order to make reprints.

Web client

A web client is included in Monitor G5. This can either be run in a regular web browser or as an app for Android and IOS. However, the web client has fewer procedures and functions than the Windows client. Before you can use the web client you must configure some settings for users and Monitor G5 Web server must be installed.

Settings on user

For users who should use the web client and the app, there are a few settings that must be configured by the administrator, as you see below. You find these settings in the *Users* procedure in the Windows client.

General	
Password	*****
Language	SV
Warehouse	Hudiksvall
Employee number	
Windows account	
<input checked="" type="checkbox"/> Can be set as responsible for activity	
<input checked="" type="checkbox"/> Allow login to web client	

- » The setting *Allow login to web client* must be activated. When you activate this setting you must also enter one of the following settings.
- » A password must be entered in the field *Password*. This password is then used for login to the web client.
- » The user's account can also be linked to an account in Windows using the setting *Windows account*. Then you do not have to enter a password in the password field. The user should instead use the password for the Windows account when logging in to the web client.

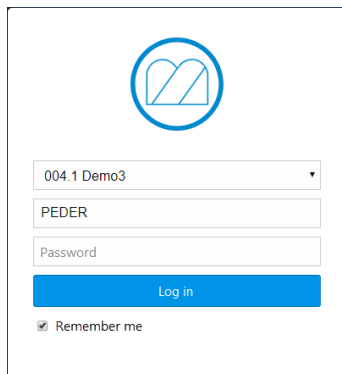
Installation of web server

To be able to use the web client and the app, the Monitor G5 Web server must be installed in your network. The actual installation of the web server is performed by a support technician from Monitor ERP System AB.

Web browser

The web client can be run on a modern web browser with support for HTML5.

You get the address to the web server by your administrator. When you have entered the address in the web browser, a login page is shown. There you enter your user name in Monitor G5 and the password supplied by your administrator. Alternatively, it is the same password you use for your Windows account.



The screenshot shows a login page for Monitor G5. At the top center is a circular logo containing a stylized 'M' and 'G' intertwined. Below the logo is a dropdown menu with the text '004.1 Demo3'. Underneath are two text input fields: the first contains 'PEDER' and the second is labeled 'Password'. A blue button with the text 'Log in' is positioned below the password field. At the bottom left, there is a checked checkbox labeled 'Remember me'.

App for Android and IOS

You can also run the web client as an app on smartphones and tablet computers. There is support for Android and IOS. You download the app from Google Play or Apple App Store. There the app is called "Monitor G5".



When you start the app for the first time you are directed to the page for settings. There you enter the URL (web address) to the web server and you can choose if notifications should be displayed on the unit. You get the information about the web server's URL from your administrator.

Procedures in the web client

The web client today contains the following procedures suitable for use on a smartphone or a tablet computer: You have the same user rights in these procedures as you have in the corresponding procedures (and warehouse) in the Windows client.

Manufacturing

- » Report pick list

Purchase

- » Report arrival
- » Authorize invoice

Sales

- » Register new customer
- » Customer list
- » CRM view
- » Report delivery (pick list)

Stock

- » Part list
- » Stock count
- » Stock count against basis
- » Create stock count list
- » Move stock balance
- » Direct withdrawal
- » Direct arrival
- » Register case
- » Case list

Time recording

- » Attendance list
- » Recording terminal



Read more about the procedures and other functions in the web client's online help function (available in Swedish and English).

Options

It is possible to complement Monitor G5 with different options. These options are purchased separately. For price information about the different options, please contact Monitor ERP System AB.

You can read about all Monitor G5 options under the *Options* menu in the online help function.

How do I proceed?



Training

Monitor G5 is user-friendly and it is easy for you to get started. But you will still need some training in order to be able use the full capacity of the ERP system and to achieve highest possible use of the system.

Prior to the training you will be given access to the e-learning platform *Monitor Academy* where you find Monitor G5 courses. During training you will for example go through different basic data and flows. The training sessions are held on site on your location by consultants/trainers from Monitor ERP System AB.

We also have training materials (PDF) you can download and print when preparing for your training session. You find these under *Training* on the start page for the online help function.

Online help function

In Monitor G5 you open the *online help* with the help button  on the title bar in the program. There are also help topics for different boxes in procedure windows. A box is a section containing different fields. When you have placed the cursor in a field in the box or when an object in the box is marked, you can open a help topic for the box using the F1 key. Each procedure also has an overall help topic which you open using Shift + F1 or by clicking the *Help* button  on the toolbar in the procedure.

The contents of this *Getting started with Monitor G5* guide is also found in a more detailed version in the online help function. You find this contents under *Getting started* on the start page for the online help. You can also access the guide as a PDF which you can download via a link on the start page of the online help. In the online help function you also find information about different ways of *Using Monitor* in Monitor G5.