

Configuration Settings

Logging into Evolution



Go to the Barbour ABI homepage. Under the Customer Login area at the top right of the page, change the service to Evolution using the drop down menu. Enter your username and password and click on the **submit button**.

You will now be logged into Evolution. The main menu is displayed on the left hand side of the page. Click on the **Configuration** option.

Configuration

This will open the configuration page at the list of your users. At this point you are able to **add new users**, **activate** or **deactivate** users and **manage** what your users have access to.



Adding a user

Add New User

Click on the **Add New User** button. The Add/Modify user screen will open.

Barbour ABI
EVOLUTION

Welcome, Elaine Turburville

Main Menu Configuration Manage Users Add / Modify User Assign Privileges Assign Licenses Custom

Welcome
Analytics
Project Analytics
Company Analytics
Evolution
Projects
Companies & People
Territory Manager
Activity Manager
Configuration

Add / Modify Users

First Name :

Last Name :

Email address :

Username :

Phone :

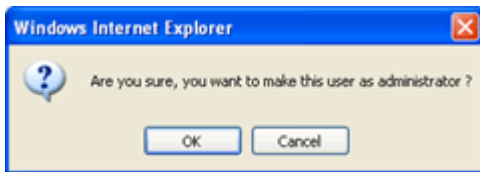
Mobile :

Is Admin :

Back Save

Add / Modify Users page

Fill in the required details. If you wish the new user to have administrator privileges, place a tick in the **Is Admin** checkbox. When you tick the **Is Admin** checkbox, a message box will open asking you to confirm that this user should be an administrator. Click **OK** to continue.



Click on the **Save** button to add the new user to the system.

Save

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Welcome
Evolution
Projects
Companies & People
Territory Manager
Activity Manager
Configuration

Add / Modify Users

First Name : Steve

Last Name : Plant

Email address : st@barbour-abi.com

Username : splant

Phone : 0151 353 3500

Mobile :

Is Admin :

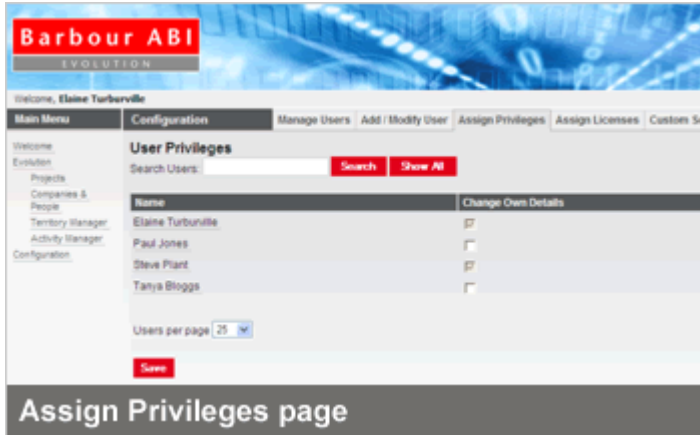
Back Save

Add / Modify Users page

Assigning Privileges

Once you have added your new users, click on the **Assign Privileges** tab at the top of the page.

Assign Privileges

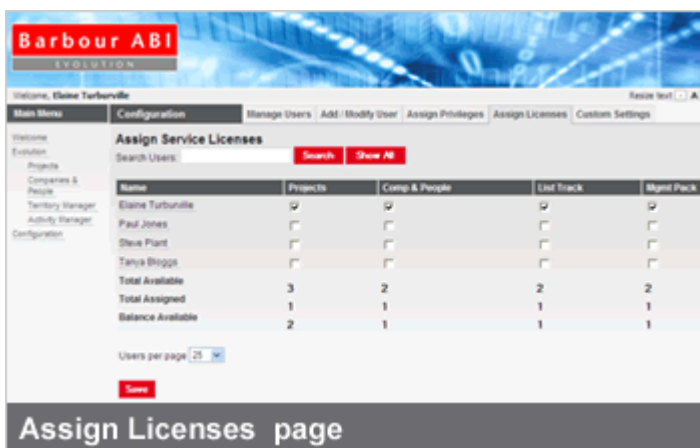


Here a full list of your users will be displayed. You can tick the checkbox to allow each user to be able to change their details, or leave the checkbox blank if you wish to have just one or two people able to make changes.

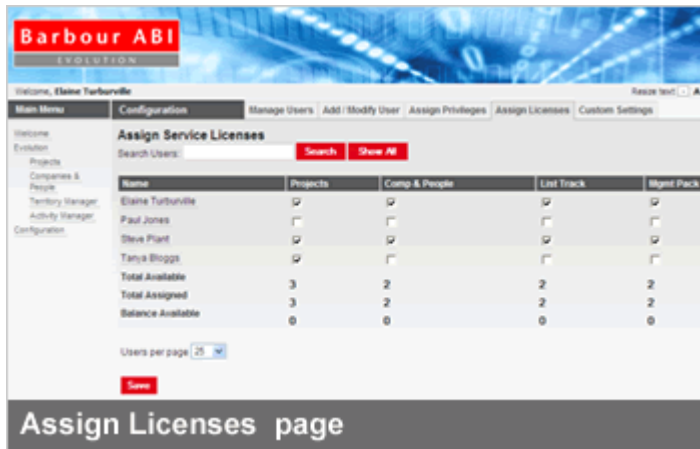
Assign Licenses

Click on the **Assign Licenses** tab at the top page. This page will show you the number of licenses your company holds for each service. You can assign licenses to your staff members by placing a tick in the relevant checkboxes.

Assign Licenses



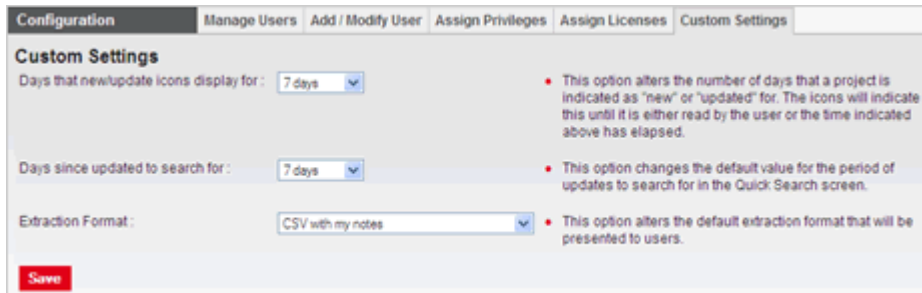
The example below shows licenses allocated using the checkboxes. If it was decided that Paul Jones needed to be able to access Evolution, you would need to either give him another users license or contact Barbour ABI to purchase an additional license.



Once you are happy with your license allocation click, on the **Save** button at the bottom of the page to save your changes.



Custom Settings



The custom settings screen allows you to change the way new and updated icons are used, or to change some of the default settings such as the default extraction file format.

Make any changes you wish and then click on **Save** to continue.

