User Manual – Basic User

Intelligent search in product records

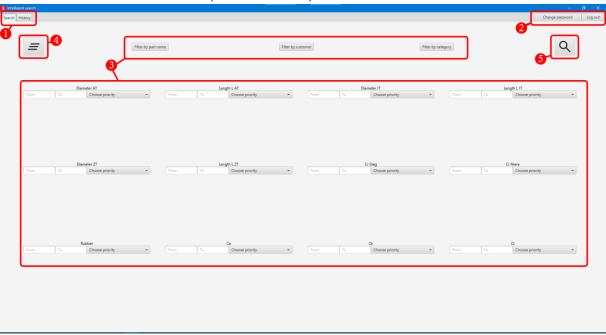
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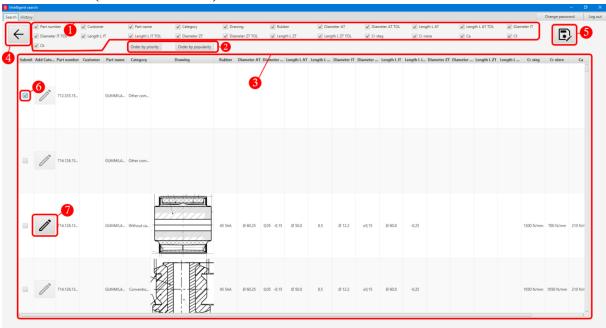
User interface overview

Main screen – Search tab (First search)



- 1. Application tabs
- 2. Change password / Log out buttons
- 3. Filters
- 4. Clear all filters button
- 5. Search button

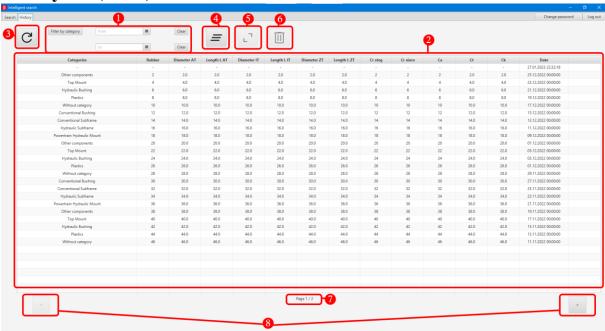
Search tab (Second search)



- 1. Activate / Hide column(s)
- 2. Filters
- 3. Search result list
- 4. Back button (back to First search)

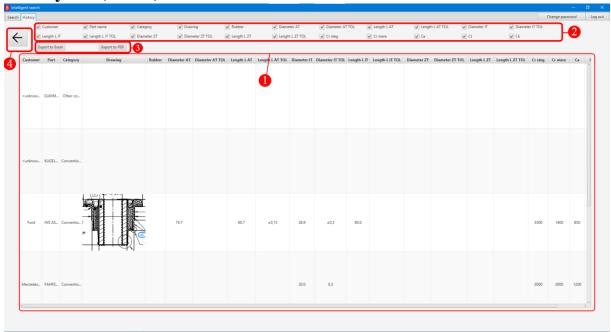
- 5. Confirm / Save search
- 6. Checkbox for selecting desired search result(s)
- 7. Edit category button

History tab (Main)



- 1. Filters
- 2. History list
- 3. Refresh list
- 4. Clear all filters button
- 5. Open selected row button
- 6. Delete selected row(s) button
- 7. Page information
- 8. Next / Previous page buttons

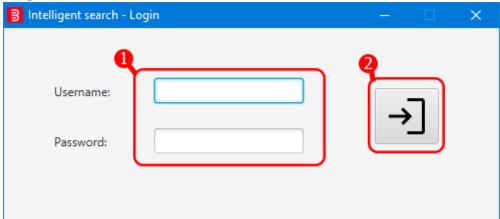
History tab (Detail)

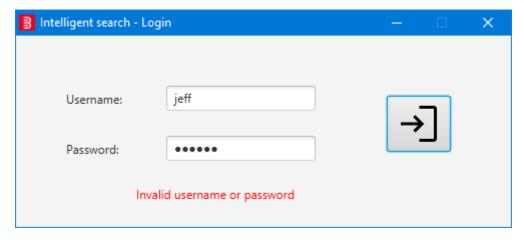


- 1. Part list
- 2. Activate / Hide column(s)
- 3. Export to PDF / Excel
- 4. Back button (back to History (Main))

Log in/out and password management

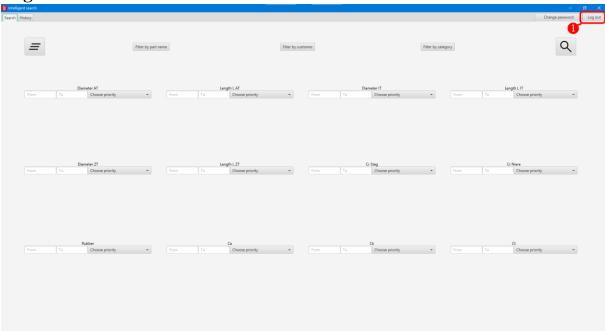
Log in





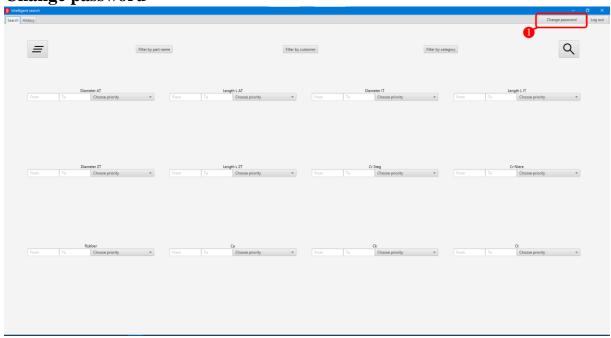
- 1. Type in **your username** and **password**.
- 2. Click on **log in icon** or press **Enter** key on your keyboard. In case of an error, a text message will be shown.

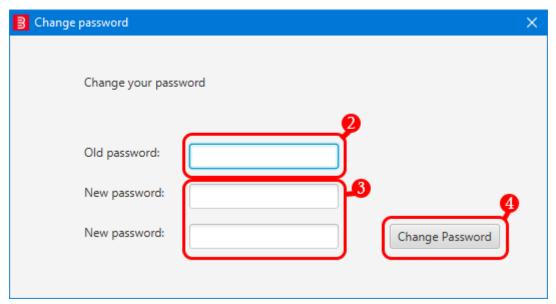
Log out

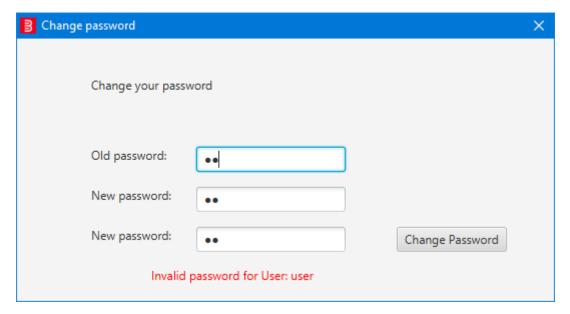


1. Click the **Log out** button located at the top right corner. Window will close and you will be greeted with log in window.

Change password



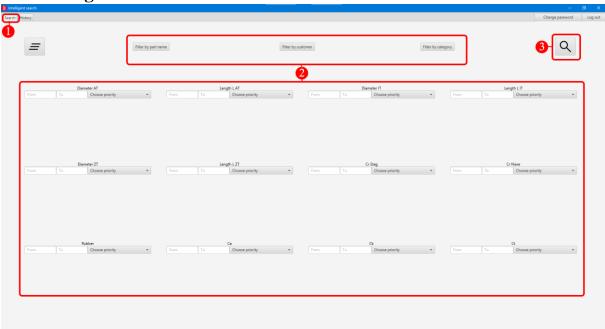




- 1. Click the **Change password** button located at the top right corner, new window will open.
- 2. Type in your **old password**.
- 3. Type in your **new password 2x**.
- 4. Click on **Change password**. In case of an error, a text message will be shown. Otherwise, the window will close and your **password will be changed**.

Search

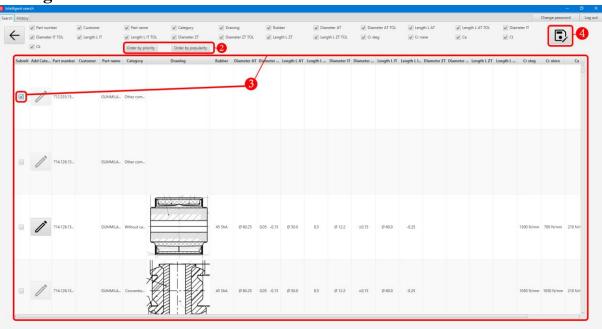
Performing search



- 1. Click on the **Search** tab.
- 2. (Optional) Apply **filters**.
 - a. (Optional) Click on **Filter by part name** button, new window will open, select desired part name(s) and confirm your choice. When filter is applied button background is darker, indicating that filter is active.

- b. (Optional) Click on **Filter by customer** button, new window will open, select desired customer(s) and confirm your choice. When filter is applied button background is darker, indicating that filter is active.
- c. (Optional) Click on **Filter by category**, new window will open, select desired category(es) and confirm your choice. When filter is applied button background is darker, indicating that filter is active.
- d. (Optional) Type in values in text fields of any desired parameter(s).
- e. (Optional) Assign priority for any desired parameter(s).
- 3. Click on **Search** button. Results of your search will be shown on your screen.

Saving search results





- 1. **Perform search**. Check **Performing search** chapter for more details.
- 2. (Optional) Result **ordering**. Following options are **mutually exclusive**.
 - a. (Optional) Order your results by **priority**.
 - b. (Optional) Order your results by **popularity**.
- 3. Navigate the result(s) and **select desired parts** by clicking on the **checkbox(es)**.
- 4. Click on the **save** button, new window will open.
- 5. (Optional) Click on **Export to PDF** or **Export to Excel** to **export** your results. You will be prompted to **select location** where it will be **exported**.
- 6. Click on **Save to history** button to **save your search** and **finish the search**. After that you will be returned to main screen First search.

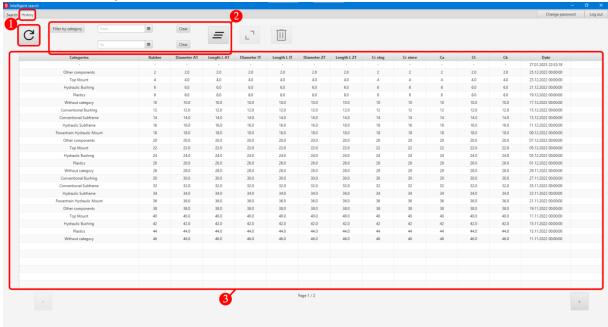
Exporting

1. Exporting is associated with **searching**. Check **Performing search and Saving search results** chapters for more details.

Note: For export to work, path to save file can't contain diacritics, i.e. 'or '

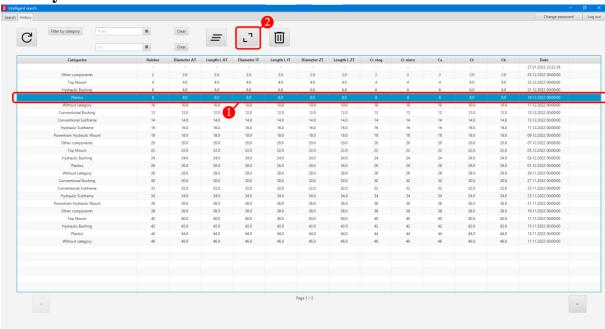
History

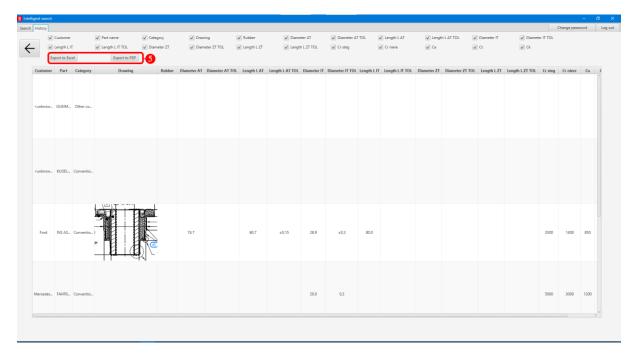
Browse history



- 1. Click on the **History** tab. (History should be refreshed automatically on entering this tab, if no use manual refresh, see History tab (Main) section)
- 2. (Optional) History **filtering**.
 - a. (Optional) Click on **Filter by category** button, new window will open, select desired category(es) and confirm your choice. When filter is applied button background is darker, indicating that filter is active.
- 3. View results.

History detail



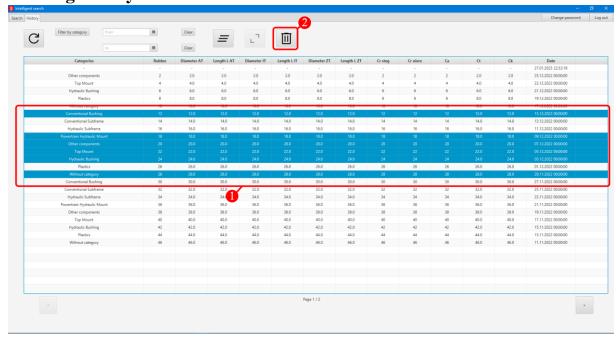


- 1. **Browse history**. Check **Browse history** chapter for more details.
- 2. Click on desired row. Selected row will be **highlighted**.
- 3. Click on open row button (Button is only enabled when only one row is selected).

Or

- 4. Double click on the desired row.
- 5. History detail will be shown on your screen.
- 6. (Optional) Click on **Export to PDF** or **Export to Excel** to export.

Deleting history



- 1. **Browse history**. Check **Browse history** chapter for more details.
- 2. Row selection.
 - a. To select only one row, left click on the row. Selected row will be highlighted.

- b. To select multiple rows from start to end, left click on any row to select the start, then while holding the left Shift key left click on the end row. Selected row(s) will be highlighted.
- c. To select multiple rows, while holding the left Shift key left click on any other row you wish to add to your selection. Selected row(s) will be highlighted.
- 3. Click on the **Bin icon**, new window will open.
- 4. Click the **confirm** button to **confirm the deletion**. Selected row(s) will be **permanently deleted**.

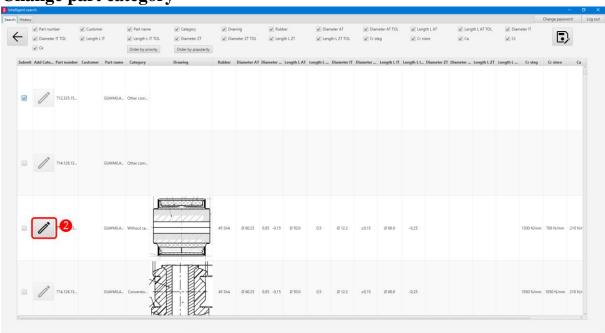
Exporting

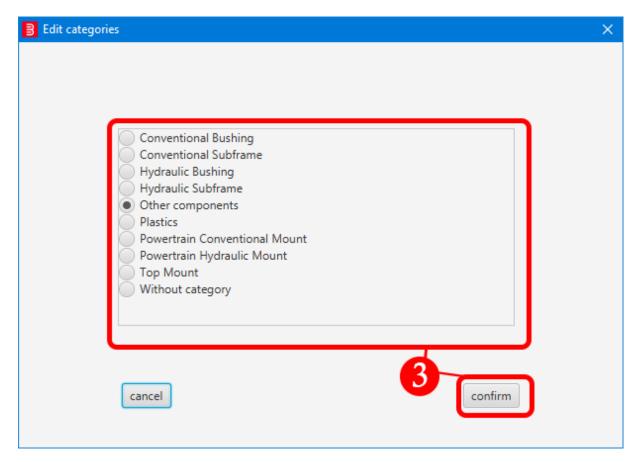
1. Exporting is associated with **History detail**. Check **History detail** chapter for more details.

Note: For export to work, path to save file can't contain diacritics, i.e. 'or '

Category management

Change part category





- 1. **Perform search**. Check **Performing search** chapter for more details.
- 2. Click on the **edit icon**, new window will open.
- 3. Select **new category** from the list and **confirm** your choice. The window will close and part category will be updated.

Note: You can only change category for parts that are without category i.e. Their category is "Without category".