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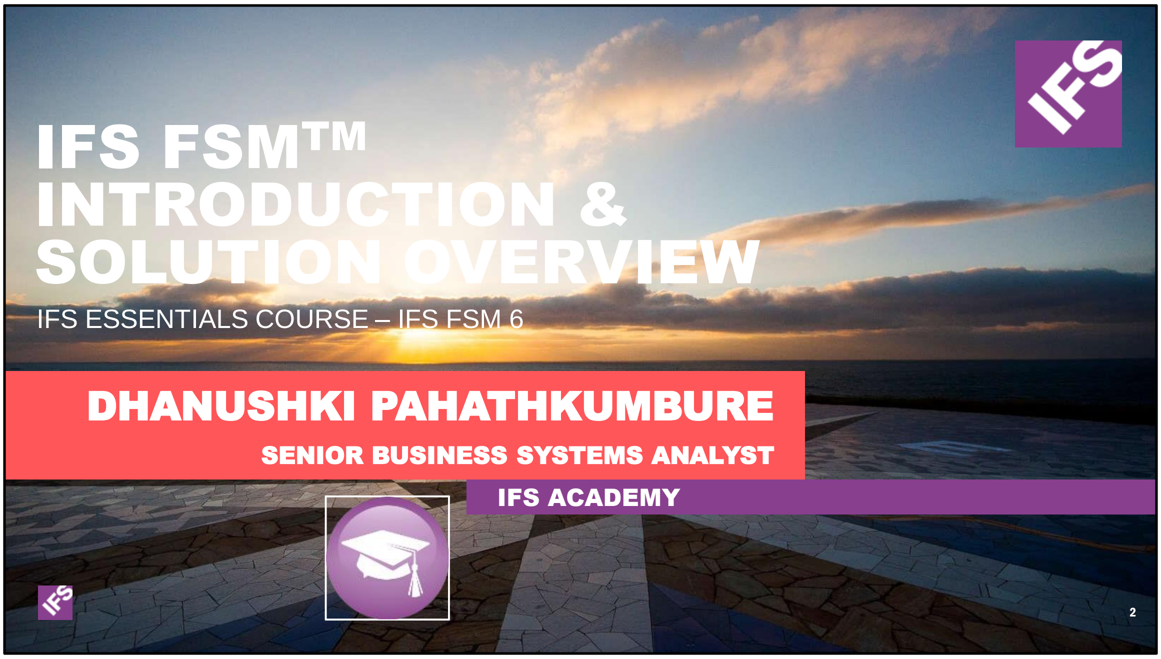
IFS
IFS FSM™
INTRODUCTION &
SOLUTION OVERVIEW
IFS ESSENTIALS COURSE – IFS FSM 6
DHANUSHKI PAHATHKUMBURE
SENIOR BUSINESS SYSTEMS ANALYST
IFS ACADEMY
2

This is the agenda for the week's course.
This morning is highlighted in the green box


SESSION AGENDA
01
INTRODUCTION
02
UI PERSONALIZATION THEMES
03
SCREEN SETTINGS & SHORTCUTS
04
ACTIVITY FEEDS
05
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WRAP UP
IFS

LEARNING ACTIVITIES

Facilitator-led Instruction
We try not to do too much of this, but it's inevitable that some of that we do during the course will involve me taking you through some slides and providing some information about how the system is structured, is designed to work and to show you how to configure the solution.

System Demos
Then, of course, we'll show you what this looks like in the system so that you can fully appreciate what we've been talking about

Hands-On
The most important part of what you'll do while you're here is get the opportunity to do some hands-on work in the training environment. This will always be a bit artificial compared to what you'll do back in the real world, but it's really important to have a go

Activities
These will be designed to give you a break from the screen and add a bit of fun!

Review sessions
This is where we'll aim to consolidate the learning that we've covered and make sure everyone has the basis they need to move on to the next steps

Knowledge Tests
Nothing heavy, just a little self-assessment so that you can check your learning progress and understand where your knowledge gaps are

LEARNING APPROACHES

Outcomes-based
For each lesson we'll set out, at the beginning, what we anticipate you'll be able to do by the end of the course – this means we're focused on what you'll be able to do with the training, not just on the training itself

Field service context-based
Field service is quite a distinctive business area and if you understand a bit about that context, it will really help you to appreciate what IFS customers are looking for when they implement this solution

Practically, functionally-based
We want to teach you things that are useful; whilst the code behind the scenes might be interesting to some, this course is about a practical, functional knowledge base that will allow you to implement the solution

Peer learning
There are people here from different backgrounds, with different experiences; if you get the opportunity to hear and share some of that, you'll find it makes the course more useful and more interesting

UI PERSONALIZATION
LEARNING OUTCOMES

By the end of this lesson, you should have:

- Understood there are several UI Themes
- Known that the Home page can be personalized
- To know how to setup activity feeds and personalize the lobbies

UI PERSONALIZATION
OVERVIEW

- Themes
- Screen Settings
- Saved Searches
- Shortcuts
- Lobbies
- Activity Feed

Personalization is the ability of individual users to personalize certain aspects of their user experience and to save the settings for future sessions. This is separate from the ability of administrators to configure the environment for all users.

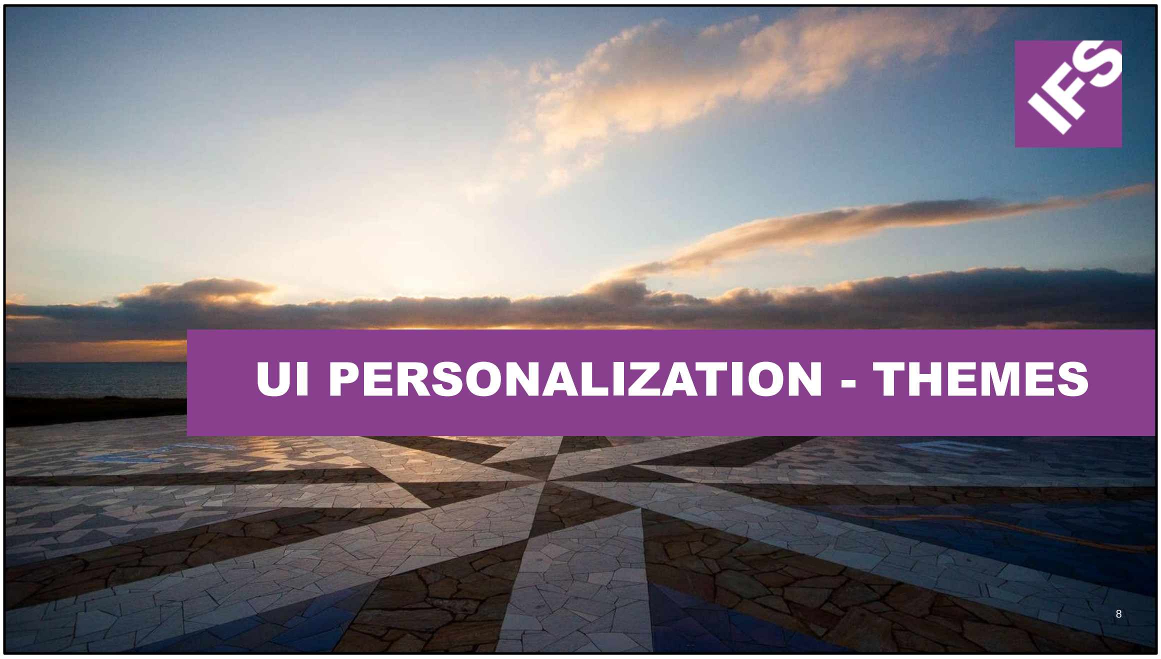
There are several ways a user can personalize the application.

Themes allow users to change the overall look and feel of the user interface. The themes have different colors and a flat or 3D look.

Screen Settings on screens can be personalized.

Saved Searches by individual users to save search criteria for individual screens. Saved Searches are not covered in this lesson, but will be covered in the "Search" lesson.

Shortcuts allows the user to quickly access frequently used screens and data.
Lobbies is a personal dashboard that can be adjusted to your needs, showing you what's happening in your business, what you need to do and what you need to monitor.
Activity Feed is used to monitor changes to selected records in near-real time.


UI PERSONALIZATION - THEMES
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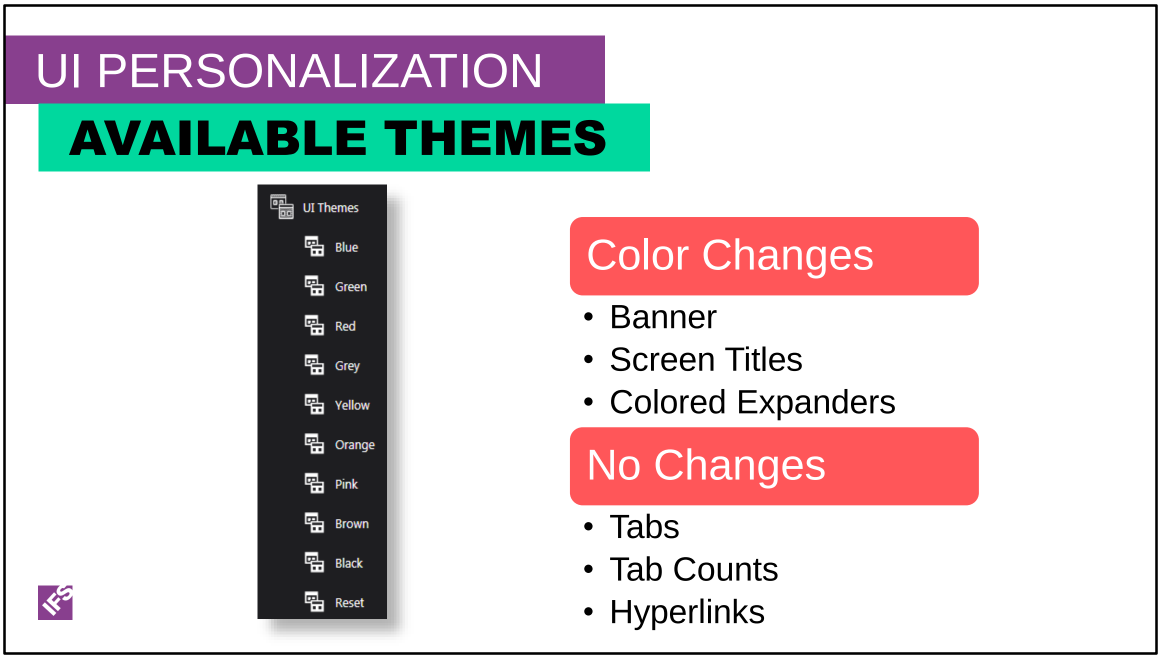
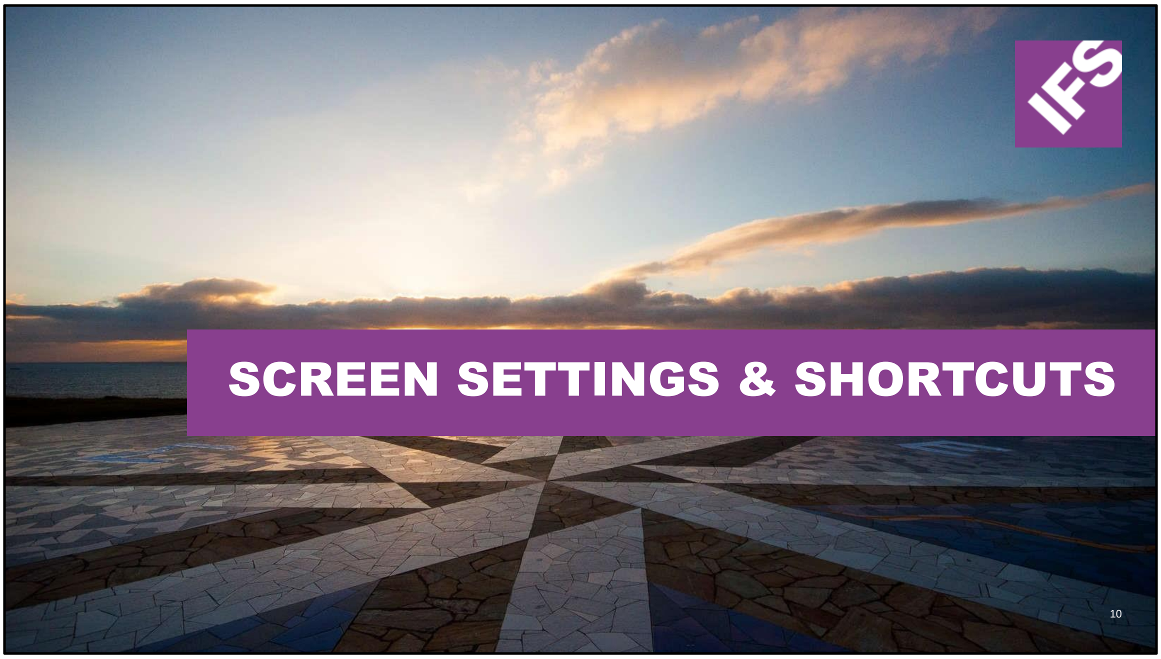


Individual users can change their UI Theme if the **allow_user_theme_change** application parameter is set to Y. Changing themes saves automatically, and the default theme can be returned by clicking **Reset** on the UI Themes submenu. Themes are found on File, UI Themes. Note, only the banner at the top of the application, screen titles and the colored expanders will change with the different themes. The tabs and tab counters remain purple. The hyperlinks remain blue.

An application parameter, **use_gradient_styling**, controls gradient styling on things like Tab items, Schedule Board task cards, and other UI elements that use gradients when using custom colors. The default is “N” upon installation.


SCREEN SETTINGS & SHORTCUTS
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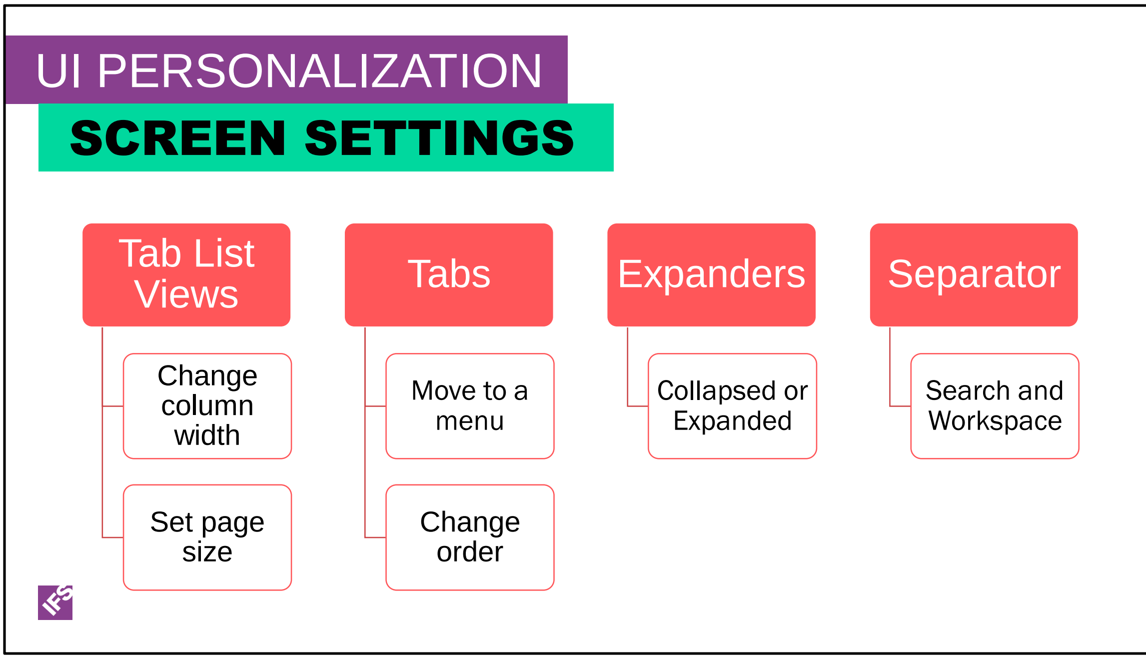


Many **Screen Settings** can be saved. Click on Save Screen Settings from the Help menu. To remove personal screen settings, click No on the dialog box that pops up.
My Settings is used in conjunction with **Save Screen Settings**. My Settings can be editable or view only based **the role function, MYSETTINGS**.

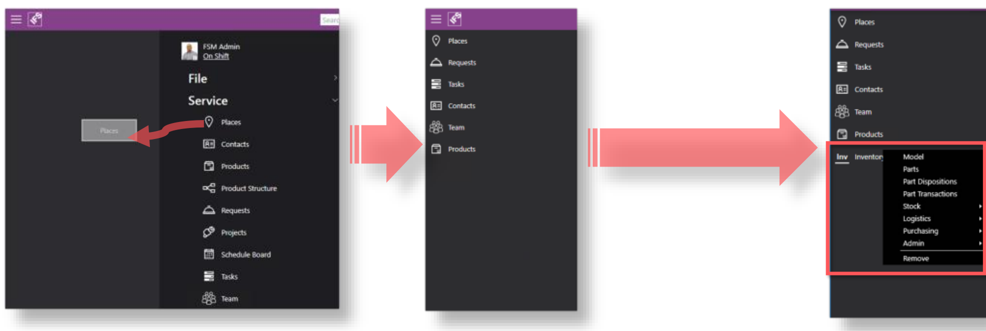
Within **Tab List Views**, the column width of record lists in the tabs can be changed by dragging the column header's border. Also, right-click to Set Page Size to the number of records you want to see on each page. Selecting All will increase vertical scrolling, but will eliminate the need to scroll between pages with the arrow buttons or mouse.
Tabs on a screen can be moved to the Tab Menu and their order can be changed by right-clicking on the tab.
Expanders toggle buttons are used to collapse or expand sections of the screen or switch between List and Detail view of record lists.
Point to the **Separator** between the Search and Workspace panels, which becomes a crosshair, to drag the column to the desired size.

UI PERSONALIZATION

SHORTCUT TOOLBAR

Each user can personalize their own Shortcut Toolbar

- Shortcut can be added via drag and drop
- List of Personalized shortcuts
- Submenu Groups can also be added, these are shown <u>Underlined</u>



The Shortcut Toolbar can be personalized to each individual. The toolbar is on the left side of screen.

You must have the application parameter set **enable_shortcut_toolbar** to enable Shortcut and Recent Screens Toolbar. It does require a Relogin or Exit to take affect after refresh cache.

On Roles, you can have the function **"SHORTCUTTOOLBAR"** disabled.

You are allowed to have functions and menus added to toolbar adding via drag and drop functionality. You will get a scrollbar for more functions and menus then visible on the shortcut menu.

Process:

1. Search from menu. Click and hold. Drag and drop on menu (becomes a tile).
2. If the screen is already opened, right mouse click on the tab to open a menu to "Add to Shortcuts".

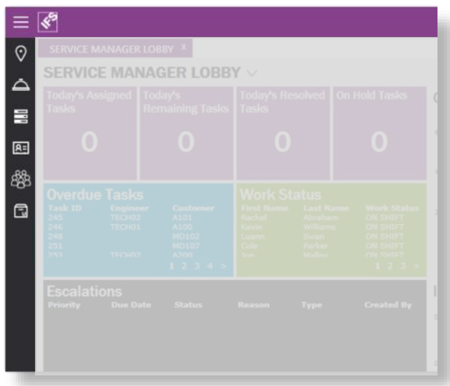
To Remove a tile:

1. Right mouse click to get the "Remove" on the tile. Click to remove.
2. If the screen is already opened, right mouse click on the tab to open a menu to "Remove from Shortcuts".

UI PERSONALIZATION

SHORTCUT TOOLBAR

- Icons for shortcuts remain visible when working



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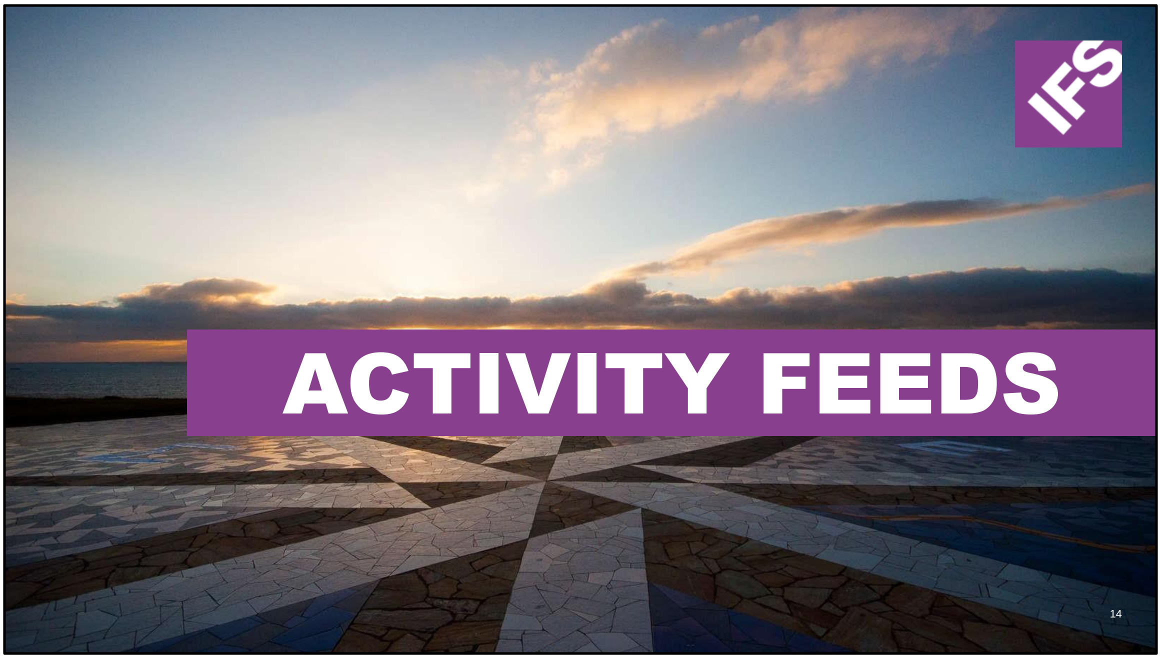
IFS
ACTIVITY FEEDS
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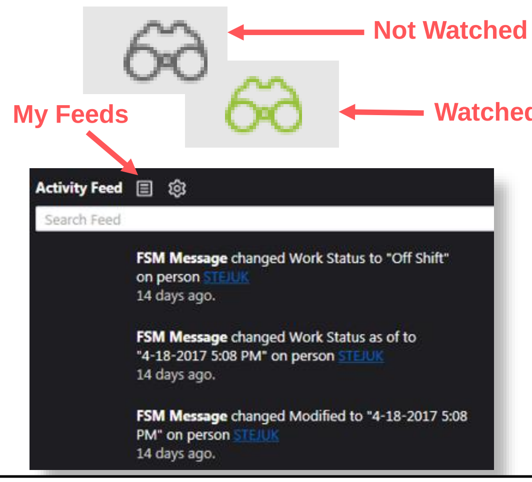
UI PERSONALIZATION

ACTIVITY FEED OVERVIEW

- Track and monitor changes on a record
- Binoculars icon changes color on monitored record
- Activity Feed on menu provide changed records



The Activity Feed is used to monitor changes to selected records in near-real time. These could be customers, contract details and other configured entities. This feature is for a few people to watch a few records; many people watching many records can degrade performance.

For example, for a CSR, an activity may be for group of customers. For a FSE, perhaps for a customer in service. For a Contract administrator against any of the contract for which the user is responsible. For a System admin to easily see changes that have occurred against the primary metadata tables which impact the behavior of the application including business rules, sync rules, etc.

On a screen whose primary table you want to watch, you select the fields to watch and specify any constraints. When a change matches your parameters, the record appears in your activity feed. When you set up multiple columns to watch with optional constraints, they are treated as an implicit OR.

Child records can be followed as well as primary records. For example, you can choose to follow tasks related to a specific request.

Setup:

Applications Parameters

Activity_feed_enabled = Y

Activity_feed max_follow = default 20 - maximum number of records/changes that can be followed. Larger values may degrade performance.

Activity_feed_refresh_rate = default 1 - number of minutes between refreshes. Smaller values may degrade performance.

Person record

If you want to send email notifications, you must have the email address set. This indicates whether a notification is sent in addition to recording the change.

Process:

Click binoculars to access the Feed Settings screen, where you select the fields and optional constraints you want to watch.

Icon changes color.

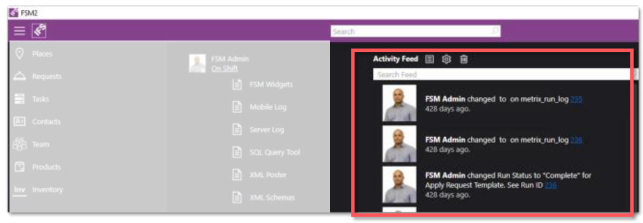
From the menu, view the Activity feed. The feed will display changes up to the maximum allowed by the application parameter.

Click on the "My Feeds" icon to see the configured activity feeds.

UI PERSONALIZATION

ACTIVITY FEED OVERVIEW

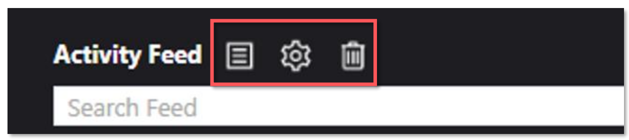
- The Activity Feed is the third column in the main menu
- The feeds shown can be customized by the individua user



My Activity Feeds

Settings

Mark All as Read



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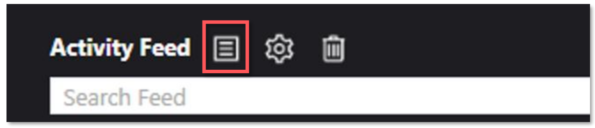
UI PERSONALIZATION

ACTIVITY FEED OVERVIEW

My Activity Feeds

1 Clicking on the Icon displays a list of all Feed Items

2 These can be filtered using the Search Fields



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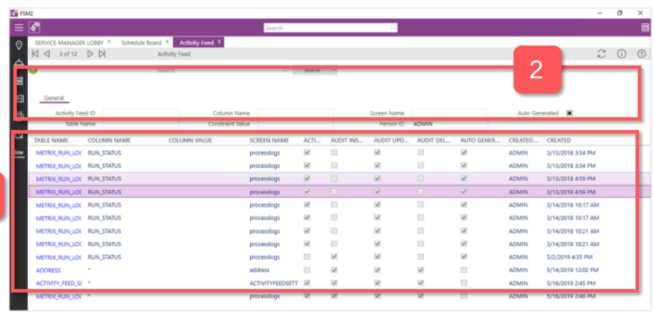

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Icon changes color.
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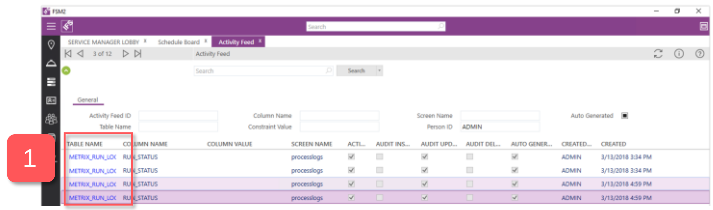
UI PERSONALIZATION

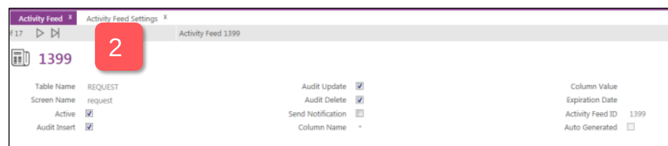
ACTIVITY FEED

- To change the settings or constraints that make a feed appear

1 Select the setting

2 Make changes to the Activity Feed settings





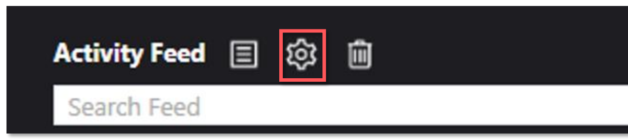
This window is used to select the fields and enter the constraints that cause a record to appear in your activity feed. Instead of deleting a field from the feed, you can choose to deselect it instead. It will remain, deselected, in the feed. If it is not selected again within 14 days, it is automatically removed from the feed.
Send Notification indicates whether a notification is sent in addition to recording the change.
Expiration Date identifies when this feed expires.

UI PERSONALIZATION

ACTIVITY FEED OVERVIEW

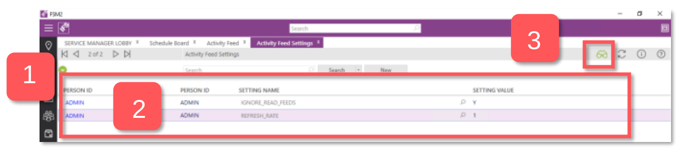
Settings

1 Clicking on the Icon displays a list of users Activity Feed Settings



- Each Setting can be made active/Inactive

2 Select setting from list



3 Click Glasses Icon


Active


Inactive

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Icon changes color.
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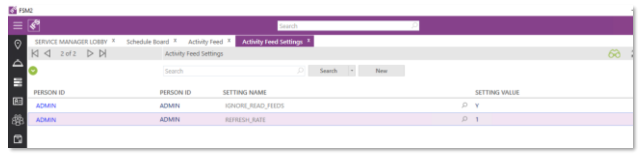
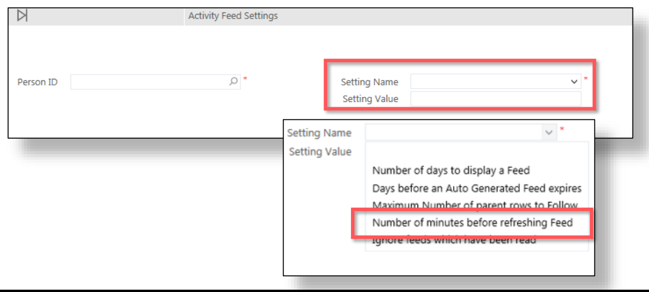
UI PERSONALIZATION

ACTIVITY FEED SETTING

- Settings are added to enable the Feed per user
- In this example, the refresh rate for the feed is set
- Select the setting name
- Then add the setting value





The Activity Feed Setting is used to create the settings per user. If needed, one record will need to be created for each of the values in the Setting Name field.
Select the Setting Name and enter the Setting Value.
For example:
Setting Name = Number of Minutes before Refreshing Feed
Setting Value = 5


LOBBIES
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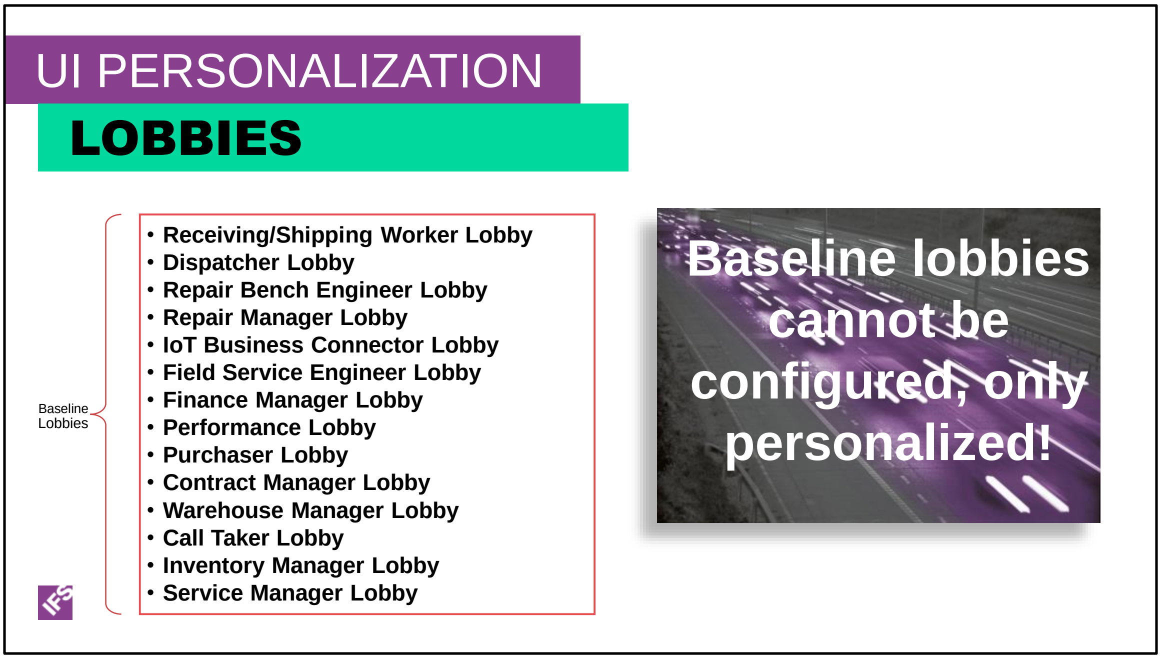

Lobbies is a personal dashboard that can be adjusted to your needs, showing you what's happening in your business, what you need to do and what you need to monitor. With the **appropriate licensing and Studio access**, you can create or edit Lobbies. Before Lobbies you had to work from numerous screens. With Lobbies, it possible to work from one dashboard. Lobbies can be created per individual, per role and even per process or business area. It is used for operational and analytical information. Lobbies are NOT supported in the XBAP web client.
We supply the following Lobbies to you:
Receiving/Shipping Worker Lobby
Dispatcher Lobby
Repair Bench Engineer Lobby
Repair Manager Lobby
IoT Business Connector Lobby
Field Service Engineer Lobby
Finance Manager Lobby
Performance Lobby
Purchaser Lobby
Contract Manager Lobby
Warehouse Manager Lobby
Call Taker Lobby
Inventory Manager Lobby
Service Manager Lobby
Baseline can't be configured but can be personalized. We will discuss how to create Lobbies in an another . In this lesson, we will discuss how to personalize the baseline lobbies.
To personalize baseline:
Click the Personalize icon (far right hand corner).
Gears will appear.
Click on a gear to personalize colors (text and background), background image, or image URL.
You can also reset personalization.

Change UI Theme and Reset the theme.
Open the Request screen.
Change the search results to List view, and move the position of the separator.
On the Part and Labor tab, enter a part need and expand part need details. Collapse the Part Usage and Labor and Expenses list views.
Move the Events tab and change column widths. Set page size to All. Move a tab to the tab menu.
Save Screen Settings and open a new screen to verify the settings.
Delete the screen settings and open a new screen to verify the original settings have returned.
Add screens and menus to the Shortcut menu
Set an Activity Feed for a change of description on a request. View what happens when the description is changed.
Show how to personalize the Service Manager Lobby.


WRAP-UP
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#forthechallengers