



# GENERAL SETTINGS

## DATA REQUIREMENTS

IFS ACADEMY

# AGENDA

**01**

COMPANY &  
SITES

**02**

USER,  
PERSON &  
EMPLOYEE

**03**

CUSTOMER &  
SUPPLIER

**04**

PART  
STRUCTURE

**05**

GENERAL  
BASIC DATA





An aerial photograph of a red running track with white lane markings. Several runners are visible, their shadows cast long and dark on the track surface, suggesting a low sun position. The runners are in various stages of their stride, moving from the top left towards the bottom right of the frame.

# LEARNING

# OBJECTIVES

**After this lesson you should have...**

- a basic understanding of the structure and the set up of:
  - Company and Site
  - User, Person and Employee
  - Customer and Supplier
  - Part Catalog
- a general idea of how to create them
- an understanding of the General Basic Data available in IFS Applications and the purpose of each item



# COMPANIES AND SITES



# COMPANY & SITES

## DEFINITION

### COMPANY

Starting point to set up the enterprise. The main purpose of the company is to collect and report the financial activities.

### SITE

A subdivision of the company. Logical entity to support logistic processes such as purchasing, sales, inventory handling, manufacturing, etc.



The background of the slide features a blurred image of a laptop with a rainbow-colored keyboard and a person's arm in a blue patterned shirt. Two horizontal bars, one red and one purple, are overlaid on the image to contain the title text.

# USER- PERSON-EMPLOYEE

# USER - PERSON - EMPLOYEE

## STRUCTURE

**USER**

A user is an entity that can log on to IFS Applications to perform a task

A person object has information which is connected. The person, but not necessarily a user of IFS Applications or employee of a company.

**PERSON**

Company

**EMPLOYEE**

An employee fulfills a job position for a organizational unit of a company.

# USER – PERSON - EMPLOYEE

## USER INFORMATION

- **Company Access:** A User needs to be connected to the Company in the Users per Company screen. This is required for the User to be able to perform any transaction for the Company, or view Company specific data.
- **Site Access:** A User needs to be connected to a Site in Sites per User screen, if he is required to perform functions related to Supply Chain, Manufacturing, Maintenance Operations, etc.
- **User Groups:** For specific finance actions, the User will need to be connected to a User Group. Finance setup is partly done per User Group
- **Security:** By assigning Security Roles to a User the users will or will not have access to modules and screens in IFS. Per screen settings are made that will allow the User to view, create and modify records there. For example a sales representative can be allowed to create and handle Sales Orders, but only allowed to view Customer Agreements and Price List information. Security is global for the entire application, not Company specific.
- **User Profile:** Any settings the User makes in terms of changed to the layout of specific screens in IFS, or any stored queries and shortcuts, are saved in the User Profile.



# USER – PERSON - EMPLOYEE

## USER SETTINGS

### CONNECT USER TO A COMPANY

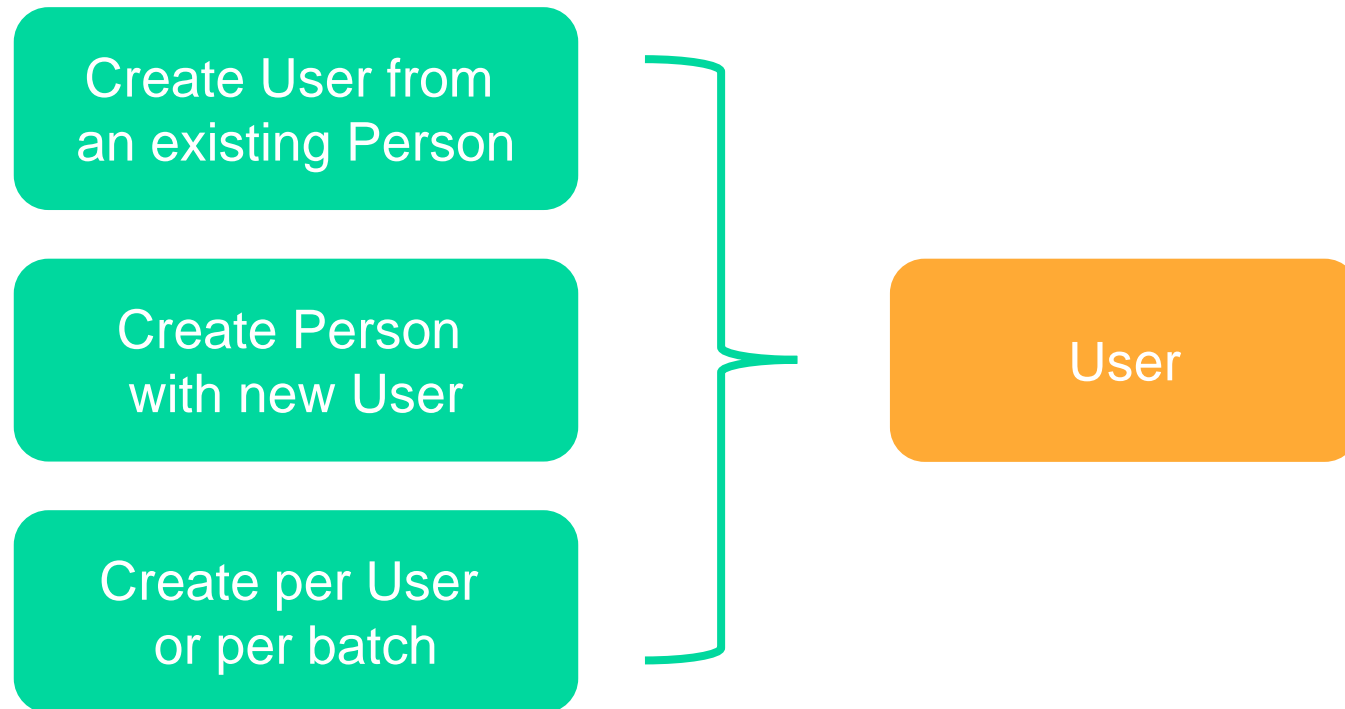
- View Company records
- Perform transactions for the Company
- Can be connected to multiple Companies

### CONNECT USER TO ONE (OR MULTIPLE) SITE(S)

- Allows User to access Site specific data
- Allows User to perform transactions for Site

# USER – PERSON - EMPLOYEE

## OPTIONS FOR USER CREATION



# USER - PERSON - EMPLOYEE

## PERSON INFORMATION AND USE

The Person record in IFS has the following information:

- **Address:** The Business Address for the Person
- **Contact information:** Ways to contact the Person, such as a phone number and email
- **Documents:** Any personal documents for that Person

The Person record in IFS is used for several purposes:

### SUPPLIER

Connect a Person to a Supplier as a Supplier Contact

### CUSTOMER

Connect a Person to a Customer as a Customer Contact

### BUSINESS ROLE

Connect Person to several available Business Roles to sign Businesses Objects such as Purchase Orders, Contracts and Customer Orders

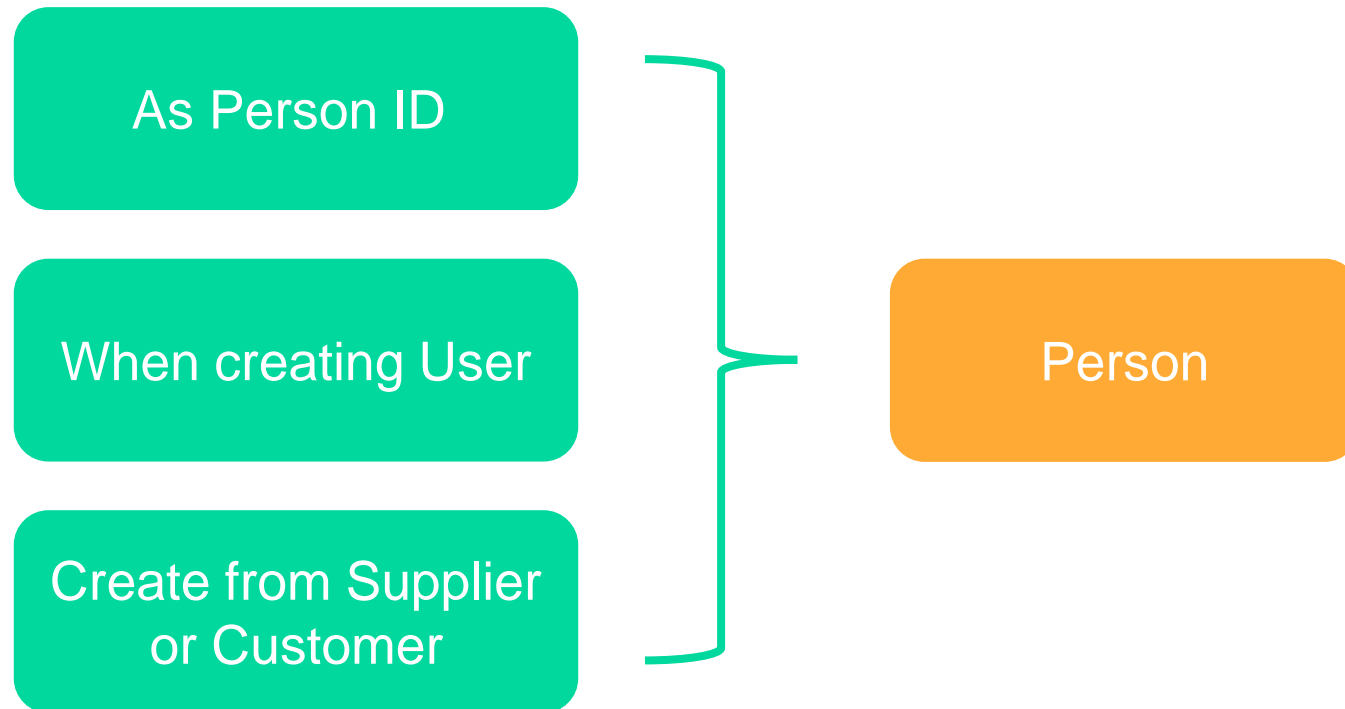
### EMPLOYEE

To create an Employee record it must be connected to a Person record, contact information is then available for the Employee.



# USER – PERSON - EMPLOYEE

## OPTIONS FOR PERSON CREATION



# USER – PERSON - EMPLOYEE

## EMPLOYEE INFORMATION

An Employee is connected to a Company (this is why there can be x Employees connected to a single Person, since it is possible that the same Person fulfils positions within multiple Companies).

- **Personal Information:** Personal information on the Employee, such as personal documents, personality traits and personal contact information.
- **Employment:** the job position(s) the Person fulfils for which Organisation Unit of the Company, along with the valid period for that Position. The Work Schedule for the Employee is also registered here.
- **Compensation information:** Salary and Benefit information for the Employee
- **Qualification:** Employee Competencies, Training Registration, Work Experience and Education and Licences can be registered here.

# USER PERSON EMPLOYEE

## EMPLOYEE GENERAL

- Employee must be registered in HR to enable for Time and Expense Reporting.
- Availability information for resource planning in relevant modules of IFS (Projects, Maintenance etc.).
- The Employee master data is available to all Human Resources components.
- Personal data is transferred from the Person record.



A high-angle photograph of a group of business professionals in a meeting. A man in a dark suit is shaking hands with a woman in a light blue blazer. Other people are visible around them, some with their hands raised in a gesture of agreement or celebration. The floor is made of large, light-colored tiles.

CUSTOMER

SUPPLIER

# CUSTOMER AND SUPPLIER

## DEFINITION

### CUSTOMER

A business partner to whom a company may sell goods or services.

A customer could be either external or internal depending on the business context.

### SUPPLIER

A business partner from whom a company may purchase goods or services.

A supplier could be either external or internal depending on the business context.

# CUSTOMER AND SUPPLIER

## CUSTOMER INFORMATION

A Customer typically has the following information connected:

- **General:** Language, Business Form and other general information (global)
- **Contact:** Contact Persons and Communication Methods for Customer (global)
- **Credit Info:** Settings for Credit Analysis and Control
- **Order:** Customer Order settings for this Customer, requirement to use this Customer on the Customer Order process (Company)
- **Invoice:** Invoice settings for this Customer (Company)
- **Payment:** Payment information such as Payment Methods for this Customer (Company)
- **EDI Setup:** message setup to enable EDI for this Customer



# CUSTOMER AND SUPPLIER

## SUPPLIER INFORMATION

A Supplier typically has the following information connected:

- **General:** Language, Business Form and other general information (global)
- **Contact:** Contact Persons and Communication Methods
- **Purchase:** Purchase Order related settings are defined here
- **Invoice:** Invoice settings for this Supplier (Company)
- **Payment:** Payment information such as Payment Methods for this Supplier (Company)
- **EDI Setup:** Message setup to enable EDI for this Supplier

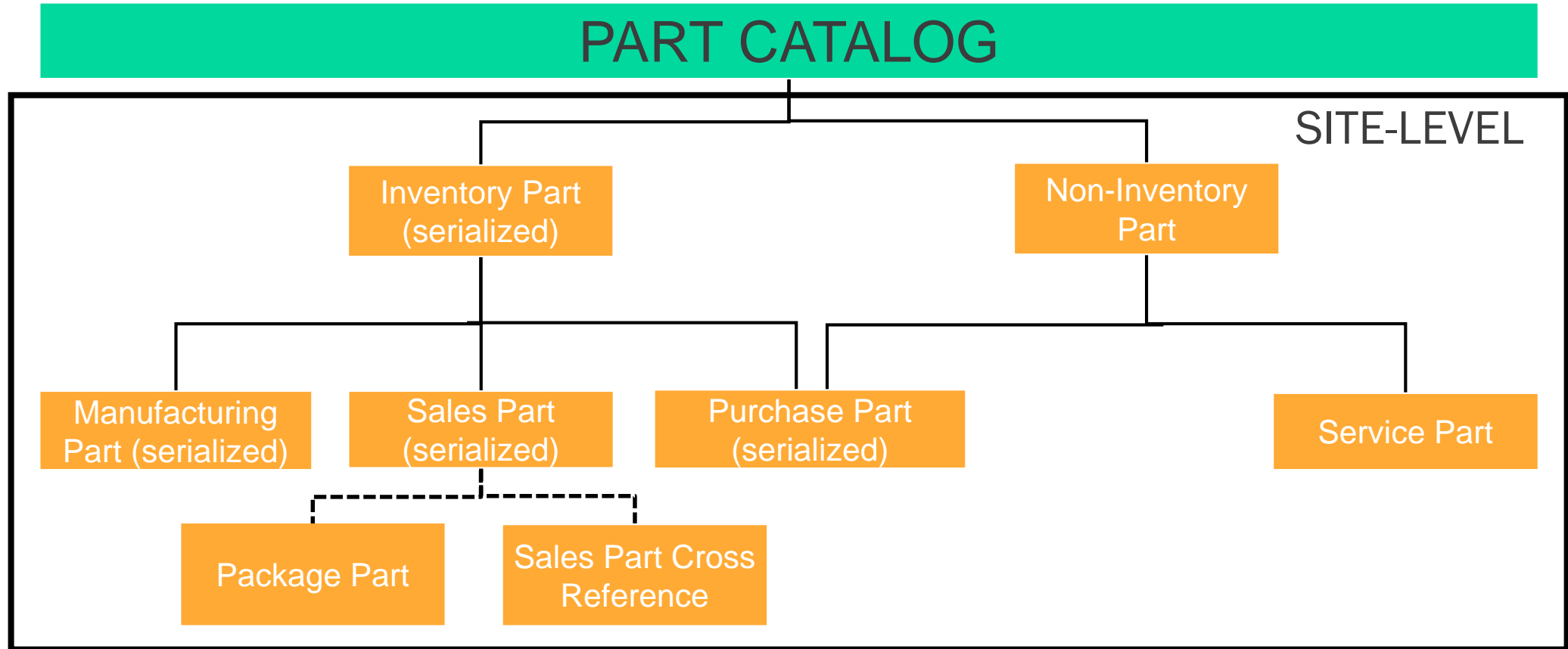


PART

**STRUCTURE**

# PART STRUCTURE

## OVERVIEW



The Part Catalog is global and not site-specific!

# PART STRUCTURE

## GENERAL

- Parts are required to sell, make, purchase and design
- In IFS Applications a part type exists for every logistical or design process
- A part in IFS consists of a string of parts per site with a part for every process it partakes in
- At the top of a part structure is a Global Part Catalog
- There are different types of parts in IFS Applications
- All types can have their own specific attributes (e.g. price, characteristics, units of measure,..) depending on the perspective the part is viewed from (e.g. Sales, Inventory, Engineering, Purchasing)



# GENERAL BASIC DATA



# GENERAL BASIC DATA

## MISCELLANEOUS

DOCUMENTTEXT

CHARACTERISTICS

Technical Classes, Attributes

WORK TIME CALENDAR

Calendar Periods, Day Types, Schedules, Exceptions, Calendar

ISO CODE USAGE

Country, Currency, Language, Unit of Measure, Time Zone

SYSTEM DEFINITIONS

PARAMETERS FOR DISTRIBUTION AND MANUFACTURING

CHARACTER AND NUMERIC VALUE DEFAULTS

# GENERAL BASIC DATA

## DOCUMENTTEXT

Text that can be added to an outgoing business object that will be visible on the printed documents. Documents are grouped with the use of outputs

- Documents are system defined - new documents cannot be entered
- You can attach “Phrases” to documents in order to print them and to group the documents together under an Output Type
- Output Types are used to methodically group the documents
- It is a collective term for all the documents it contains.

# GENERAL BASIC DATA

## CHARACTERISTICS

The Characteristics function enables you to connect a set of Attributes to a Business Object, describing the Technical Characteristics of that Object.

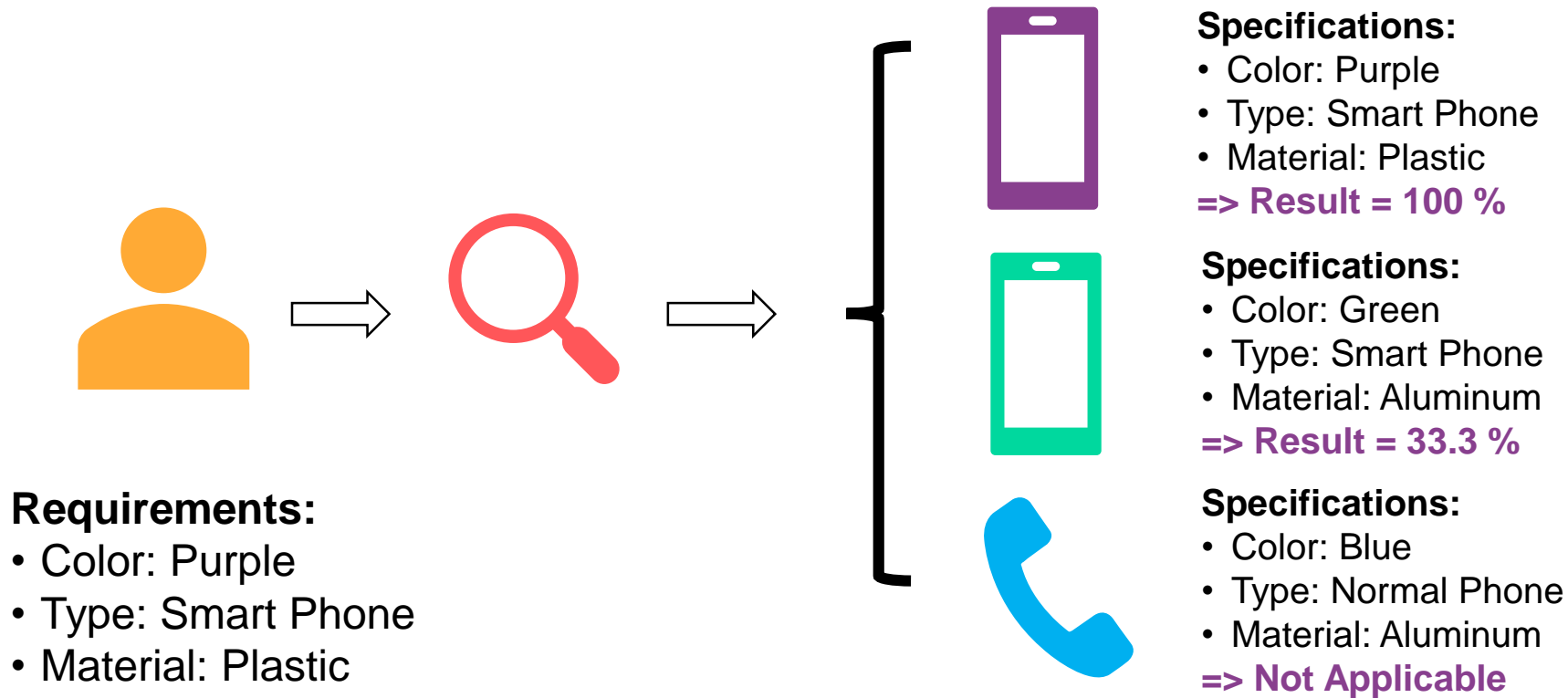
Characteristic Templates are defined in Basic Data.  
Using these Attributes, you can perform a Best Fit Search to find an Object (e.g. Engineering Part) that best suits your needs.

To connect Technical Attributes to a Business Object, you will need the following Basic Data:

- **Technical Attributes:** Technical Attributes describe the Object in some way, e.g. width, length, color, height, etc.. Attributes can be either alphanumeric or numeric.
- **Technical Classes:** Technical Attributes relevant to a specific type of Object are grouped into a Technical Classes.

# GENERAL BASIC DATA

## DEFINE CHARACTERISTICS BASIC



# GENERAL BASIC DATA

## CALENDAR

### A CALENDAR CONSISTS OF

- Day Types (working or non working)
- Schedule (days per week)
- Exceptions (bank holidays)

### A CALENDAR IS CREATED FOR A SITE TO DETAIL ACTIVITIES CAN OCCUR

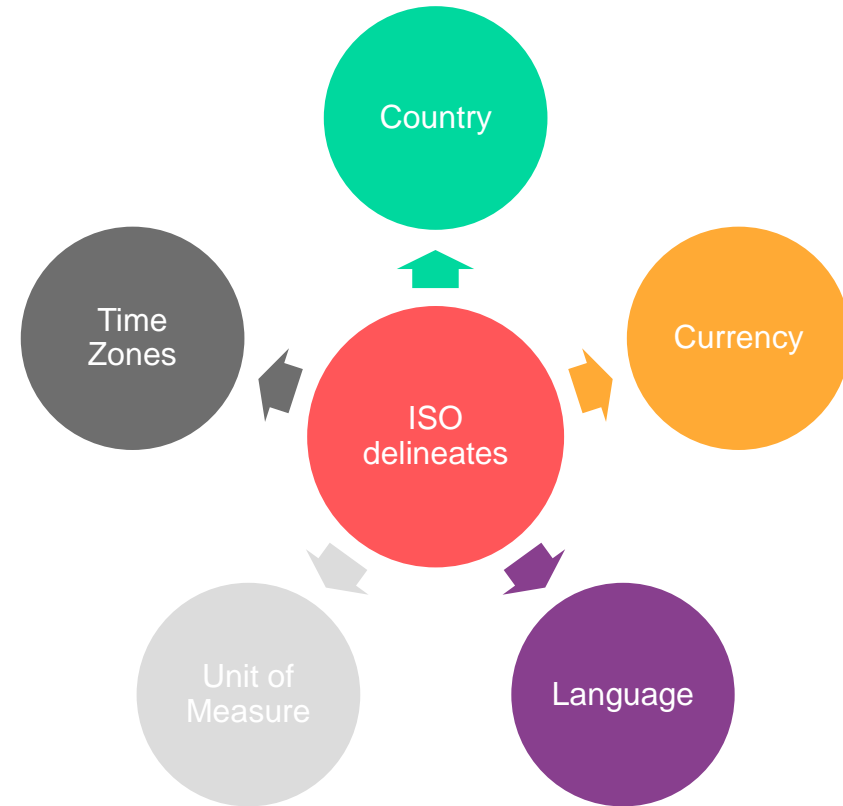
- Distribution
- Manufacturing
- Maintenance



# GENERAL BASIC DATA

## ISO CODES (LANGUAGE, CURRENCY, COUNTRY CODES)

- ISO is a standard published by the International Standards Organization
- All ISO codes are preinstalled, but must be activated before use
- You can make additions to Country, Currency and Unit of Measure



# GENERAL BASIC DATA

## PARAMETERS FOR DISTRIBUTION AND MANUFACTURING

In the System Definition window you can create customer specific definitions of certain Attributes and Objects in IFS Applications

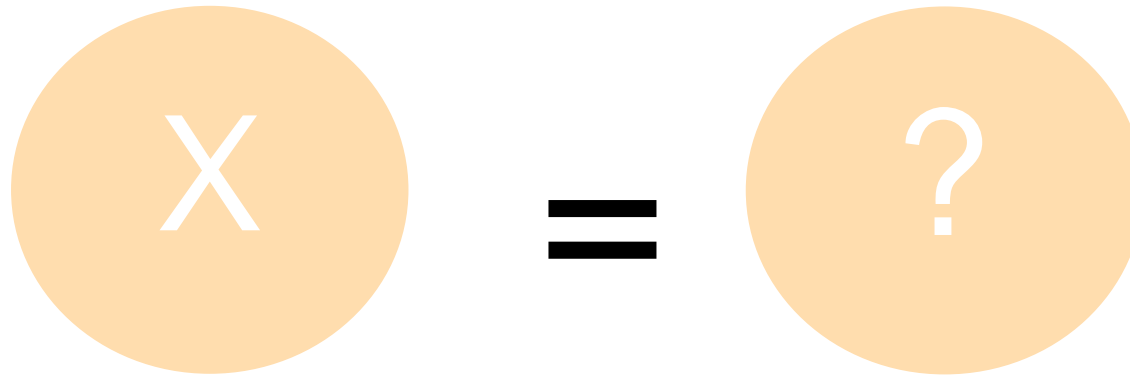
You can configure the properties of any Object or Attribute in the System Definitions window.

The Attributes and Objects available depends on the IFS Applications components installed.

# GENERAL BASIC DATA

## PARAMETERS FOR DISTRIBUTION AND MANUFACTURING

The Distribution and Manufacturing processes allow the setting of a number of parameters to **YES** or **NO**



### FOR EXAMPLE...

#### Create SO in status Planned:

If you want automatically created Shop Orders to be created in the status “Released” and not in “Planned”, value must be No.

# GENERAL BASIC DATA

## CHARACTER AND NUMERIC VALUE DEFAULTS

Set default values for a preset number of variables in IFS Applications



The default value can be a Character or a Number:

The default character value that is used in the Application if the data type is CHAR. This value can be changed by the User.

The default numeric value that is used in the Application if the data type is NUMERIC. This value can be changed by the User.



**#forthechallengers**