

A wide-angle photograph of a mountain range at either sunrise or sunset. The sky is filled with soft, warm-colored clouds, transitioning from light blue to orange and yellow. The mountain peaks in the foreground are dark and rugged, while those in the distance are partially obscured by the haze. A red horizontal bar is positioned across the middle of the image, containing the text.

IFS LOOK AND FEEL

IFS ACADEMY

IFS LOOK AND FEEL

LEARNING OBJECTIVES



After this session, you should be able to...

- Start and log into IFS Applications
- Explain the general user interface and its functions
- Navigate the Application using the available navigation options
- Query for data
- Configure screens and present data
- Handle attachments and export data
- Use online help and documentation
- Collaborate within IFS Applications
- Setup your own Start page

AGENDA



01

START UP
IFS
APPLICATIONS

02

USER
INTERFACE

03

OTHER
FEATURES



START UP APPLICATIONS

START UP

IFS APPLICATIONS



IFS Enterprise Explorer
IFS Enterprise Explorer™ is the main user interface for IFS Applications™

IFS Aurena
IFS Aurena is the entry point for casual users

IFS Aurena B2B
IFS Aurena B2B is the entry point for business to business users



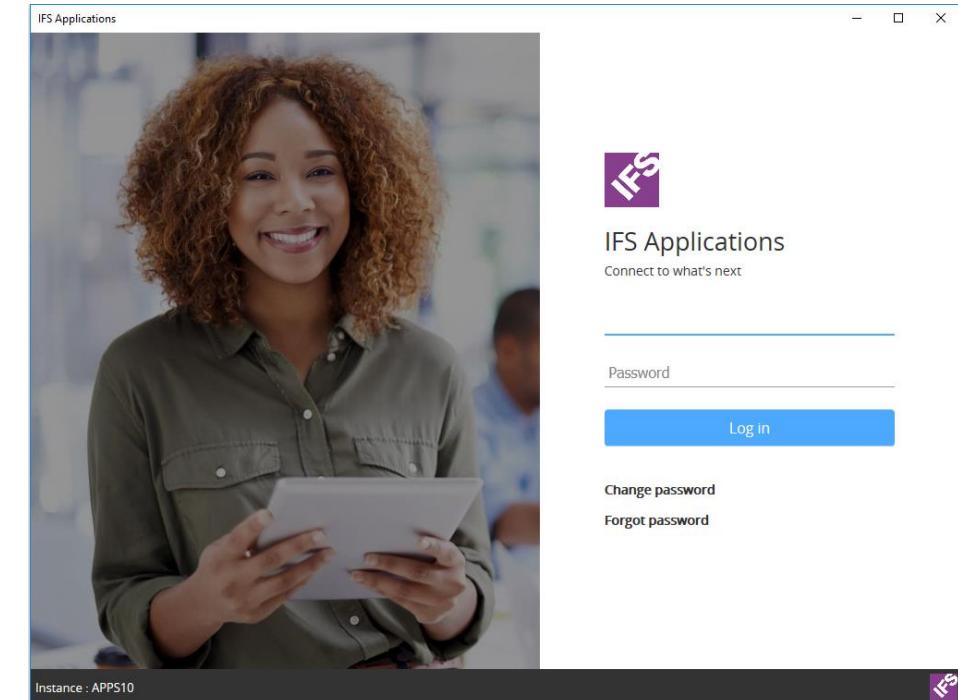
Add-ons
Add-ons needed to run specific parts of IFS Applications™



Documentation
Online documentation in English and technical documentation

Step 1: Click on the IFS link

(To change the language before starting IFS Applications you need to press **SHIFT** before clicking on the IFS link. Hold down **SHIFT** until you get to a new window)



Step 2: Enter your User name and password and click 'OK'

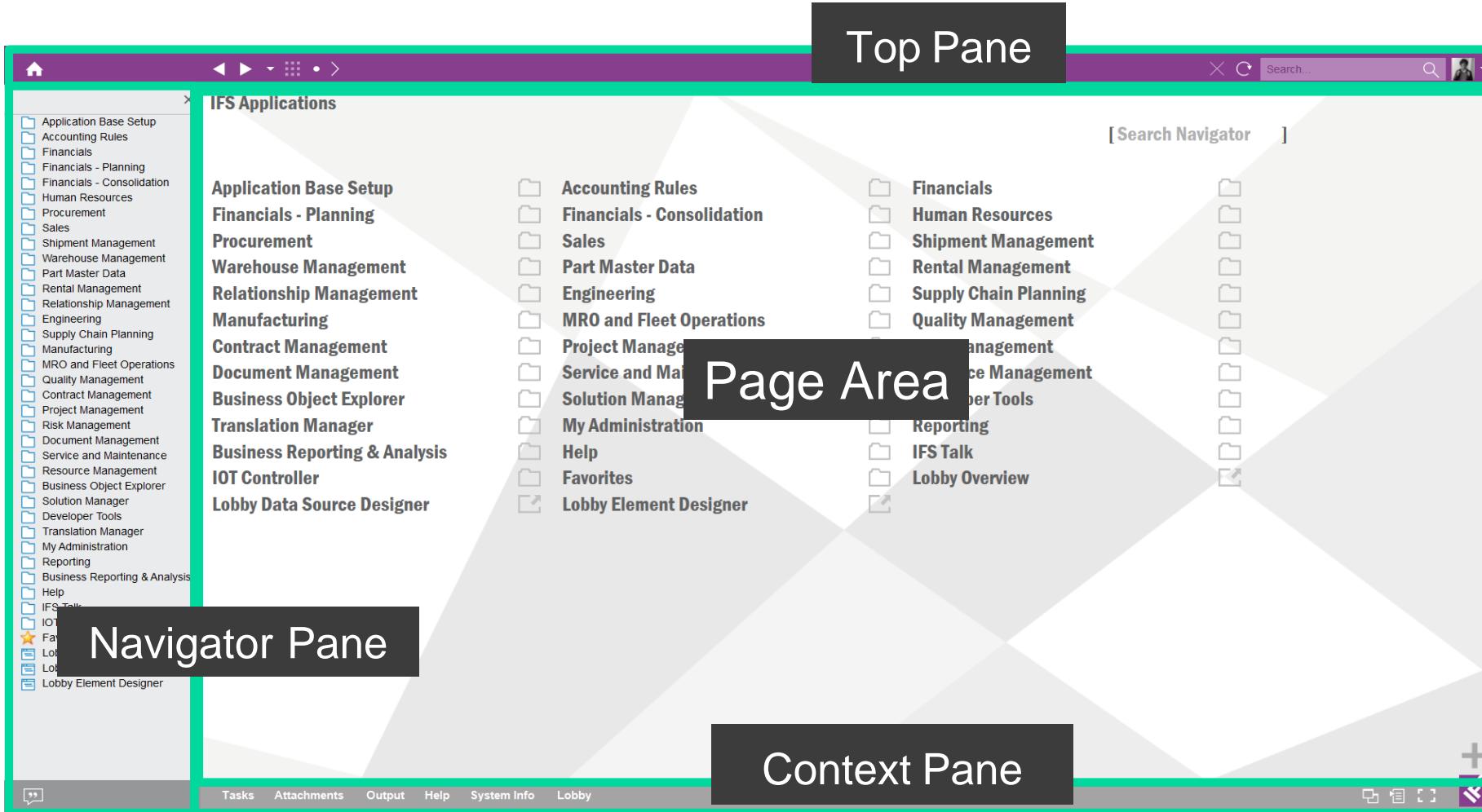
You are now logged into IFS.



USER INTERFACE

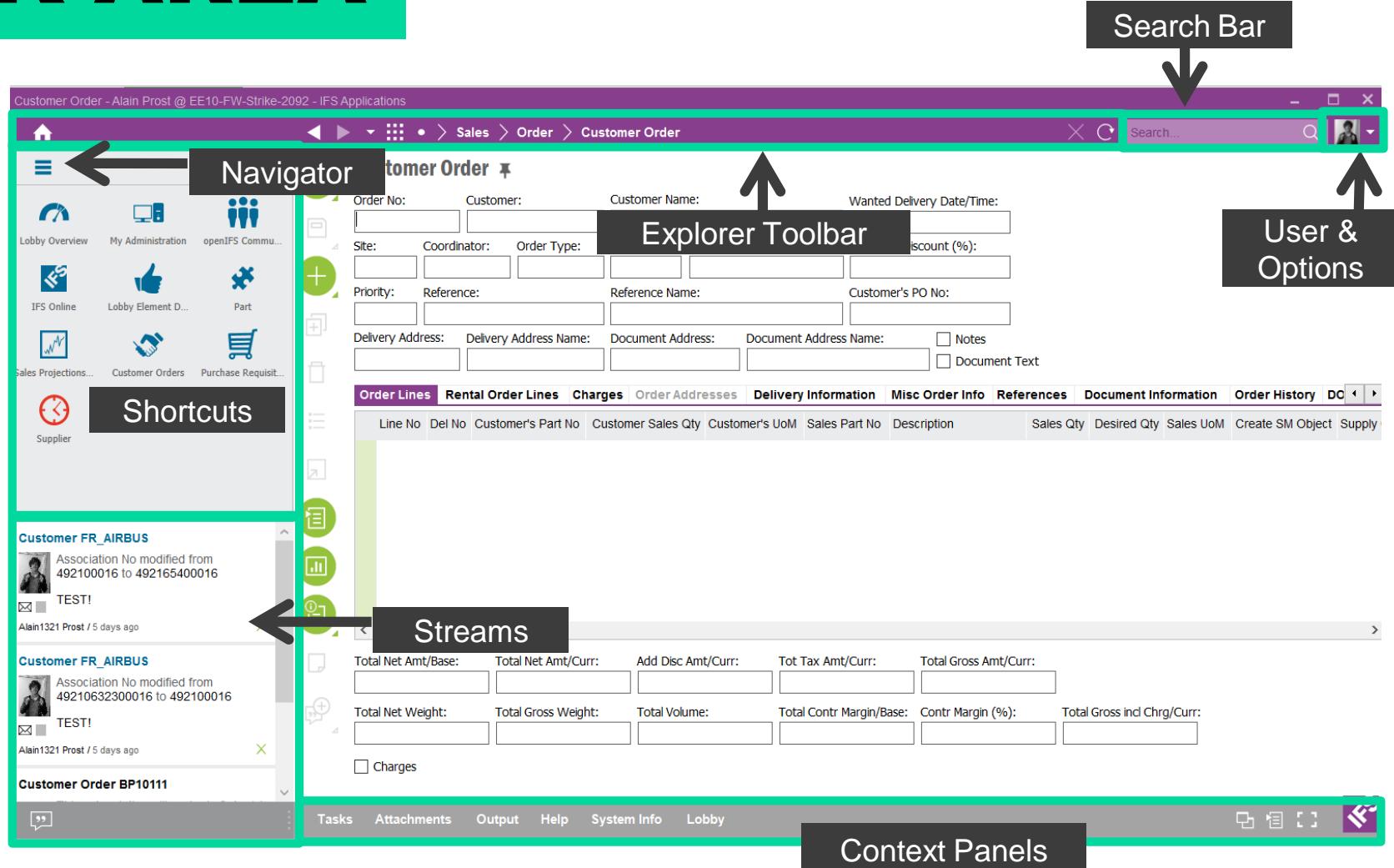
USER INTERFACE

WORK AREA PANES



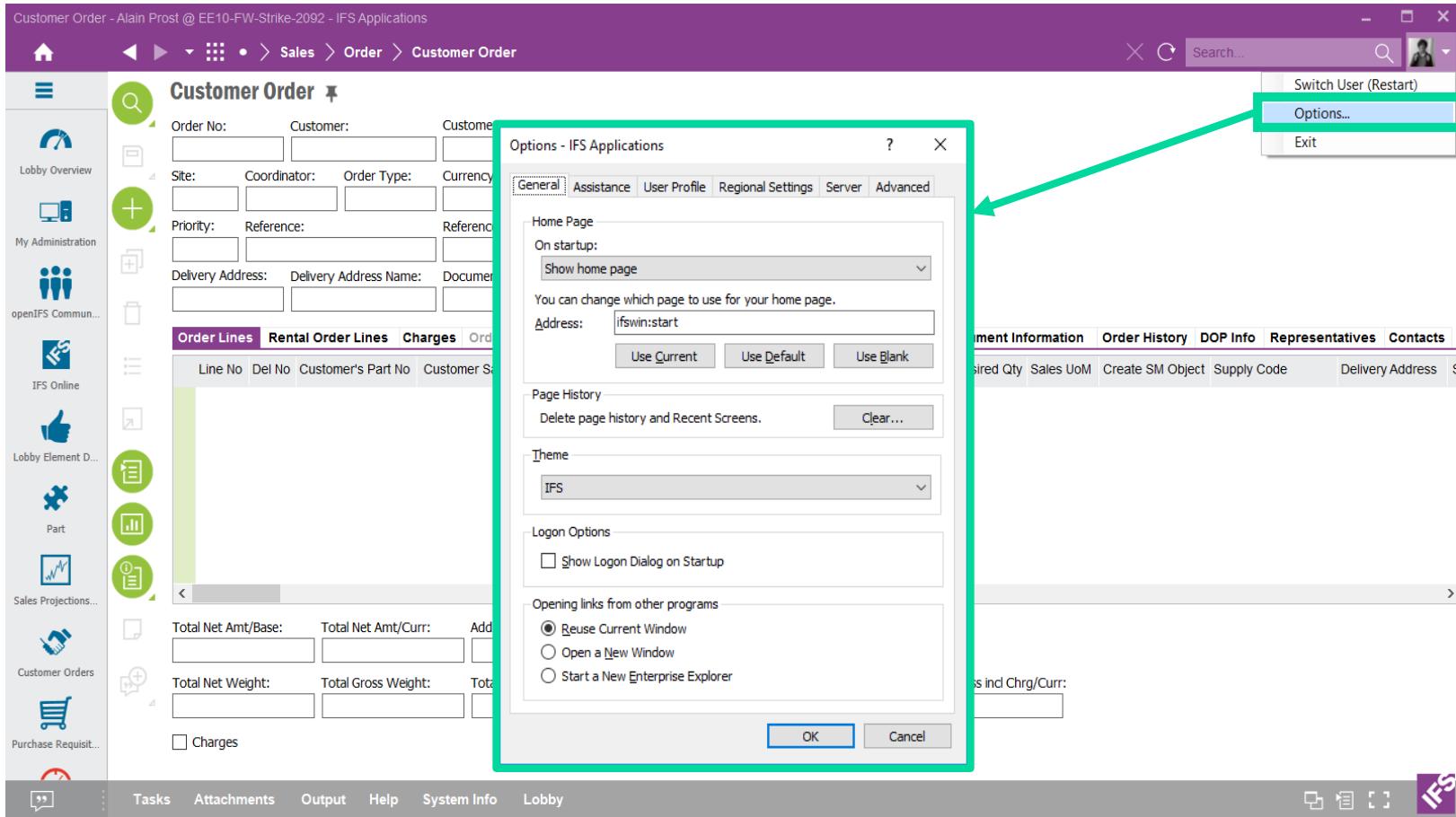
USER INTERFACE

WORK AREA



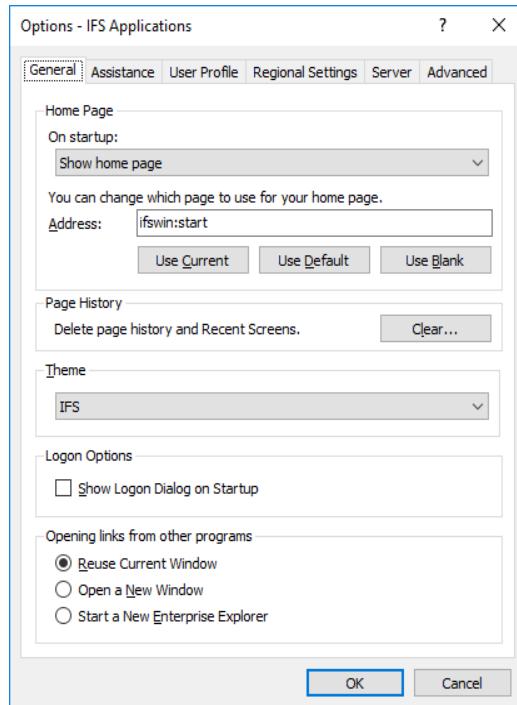
USER INTERFACE

APPLICATION OPTIONS



USER INTERFACE

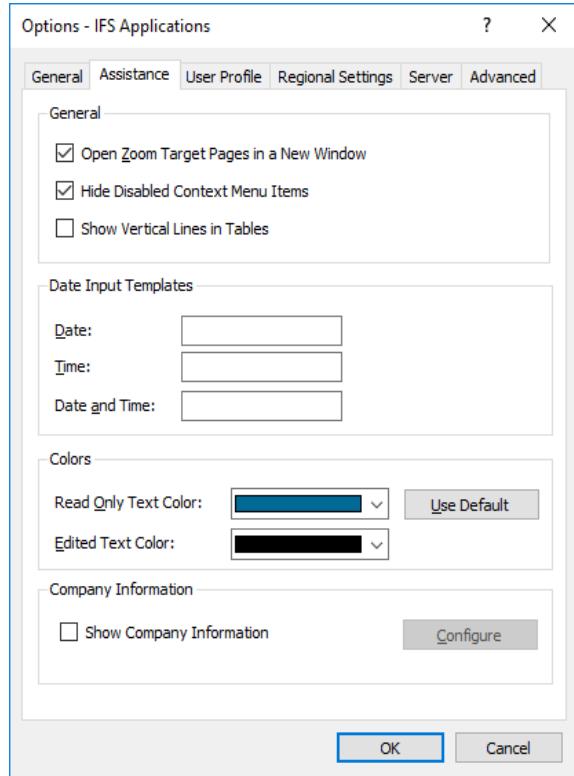
APPLICATION OPTIONS – GENERAL



- **Home Page:** Here you can define which page to use as the Home Page, it can be an IFS Application page or a web page, the default is the Navigator page
- **Page History:** With the Clear button you can clear the history of the pages you have opened
- **Theme:** In the drop-down list there is a number of predefined color themes to choose from
- **Logon Options:** To speed up the logon procedure you can choose to uncheck the check box Show Logon Dialog on Startup
- **Open links from another program:**
 - To keep the same window for all external links choose *Reuse Current Window*.
 - To have new windows created for all external links choose *Open a New Window*.
 - To open a new instance of IFS Applications choose *Start a new Enterprise Explorer*. This option is useful if you want to log into IFS Applications as two different Users.

USER INTERFACE

APPLICATION OPTIONS – ASSISTANCE



- **Show Company Information:** If you are working with several companies, *the Company Information* can help you keep them aside and avoid mistakes. If *Company Information* is active it automatically set different colors to the companies you work with.
- **Hide Disabled Context Menu Items:** If this option is selected it will hide all RMB options in a window that is currently inactive.
- **Show Vertical Lines in Tables:** In App9 vertical lines in tables are invisible by default. If a User requires it, this can be enabled.
- **Colors:** Choose text colors for field values, Read Only Text Color and Edited Text Color.
- Most format settings (like date and currency) are controlled via your Windows settings, Control Panel/Regional and Language Options

USER INTERFACE

APPLICATION OPTIONS – OTHER TABS

User Profile:

- Will be discussed later in this course when the User Profiles will be handled.

Regional Settings:

- The regional settings for formatting dates, numbers etc.., are picked from your computer's current region but there are a few things you can change in the Regional Settings tab.

Server:

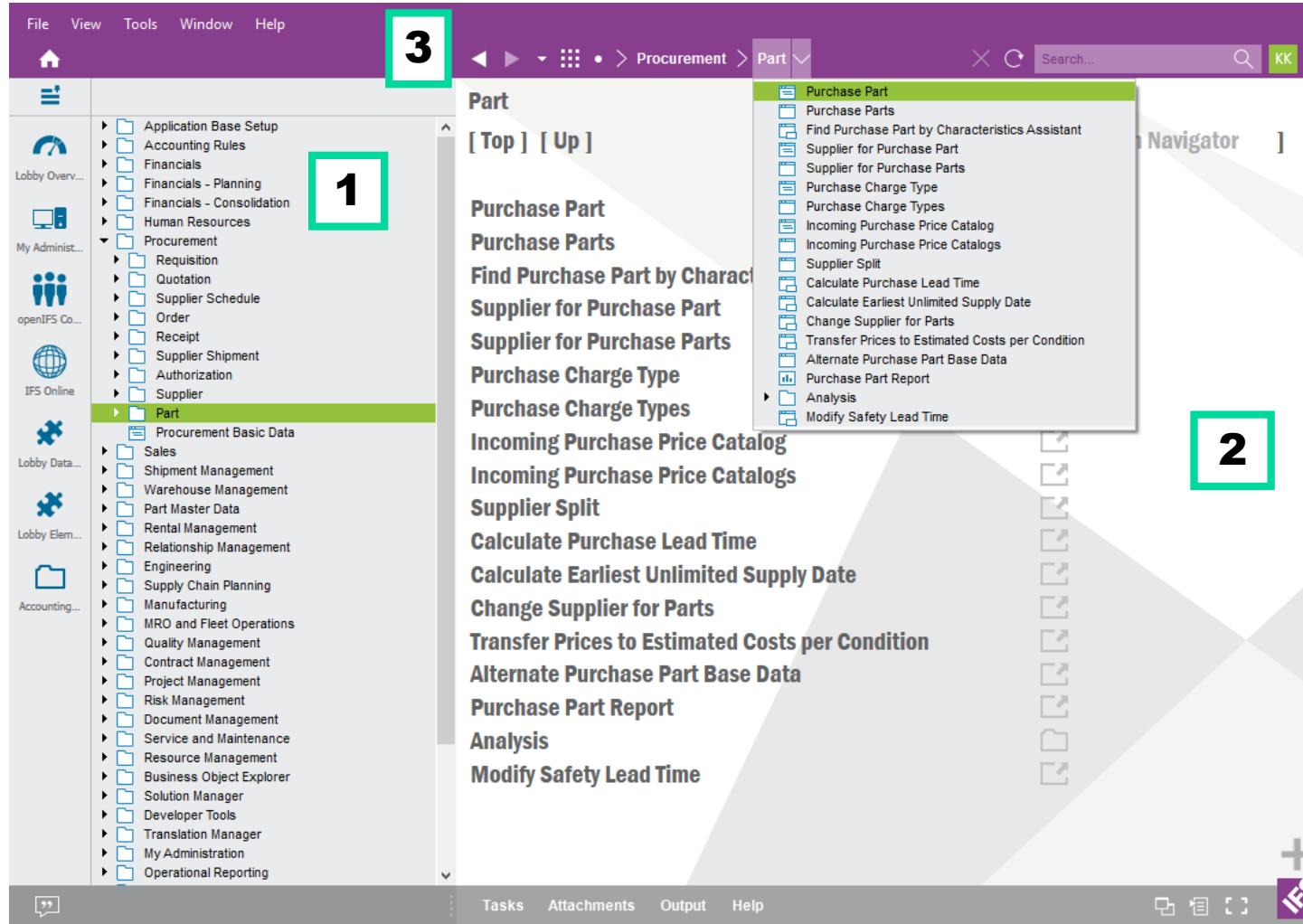
- This tab is usually only available for System Administrators.

Advanced:

- This tab is usually only available for System Administrators.

USER INTERFACE

NAVIGATOR TREE

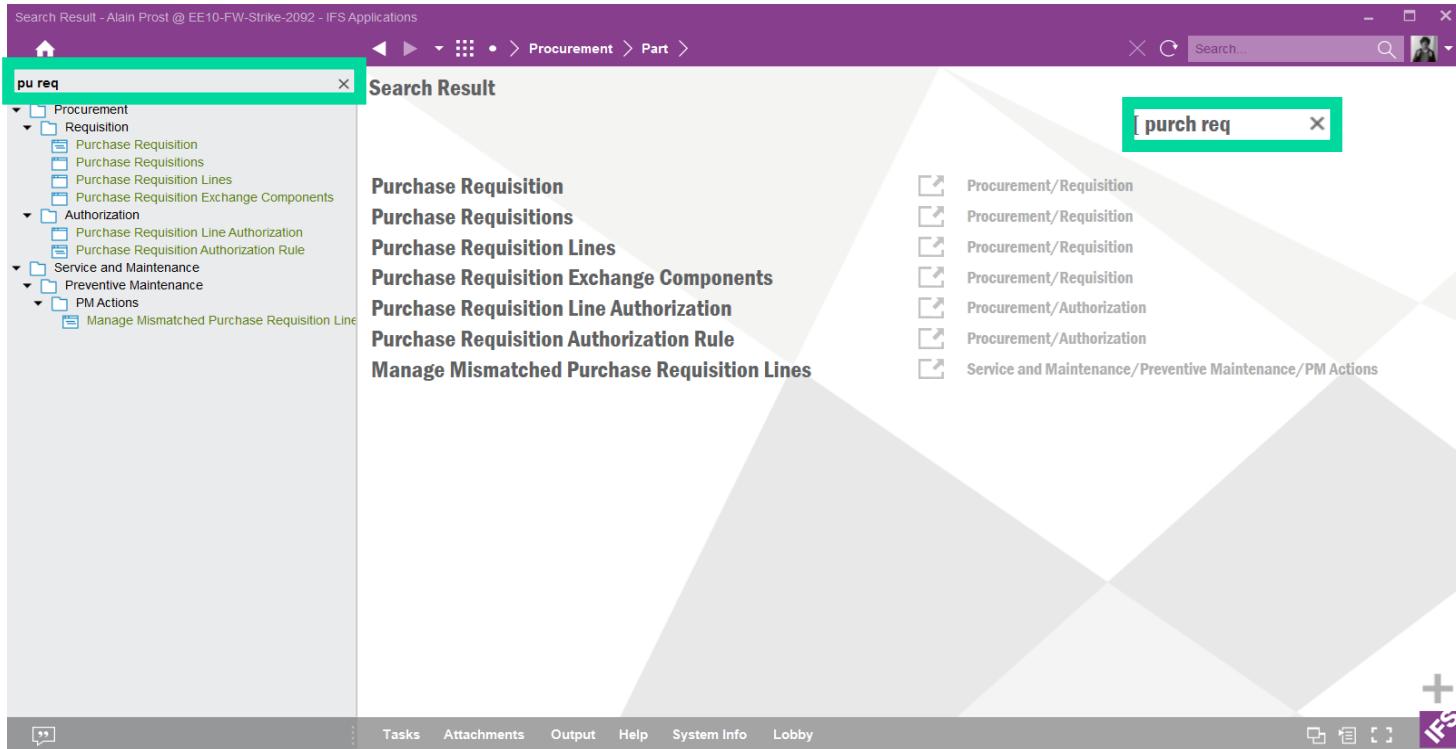


1 Navigator Tree

2 Navigator Page

3 Breadcrumbs

USER INTERFACE NAVIGATOR FILTER

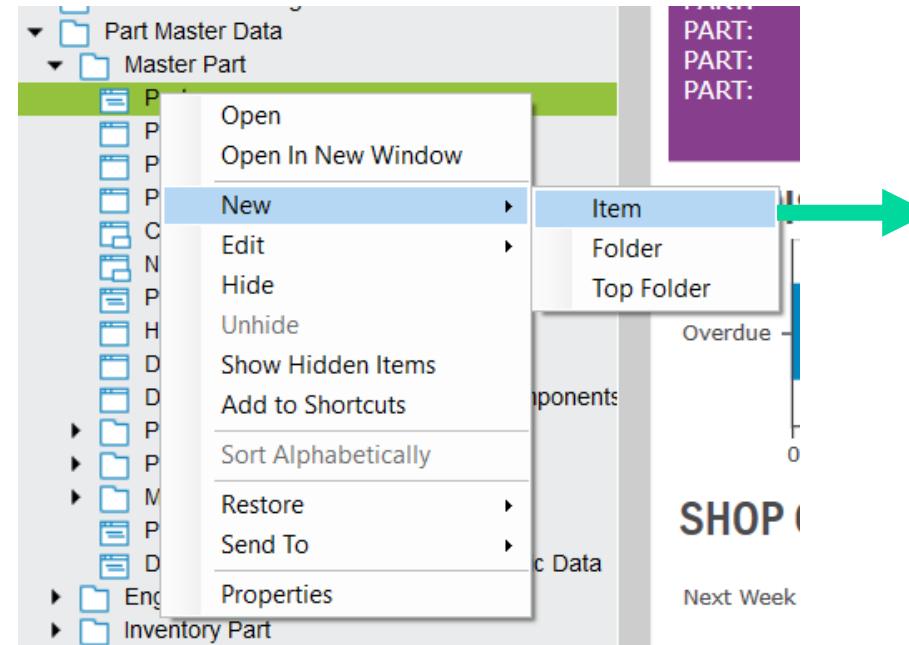
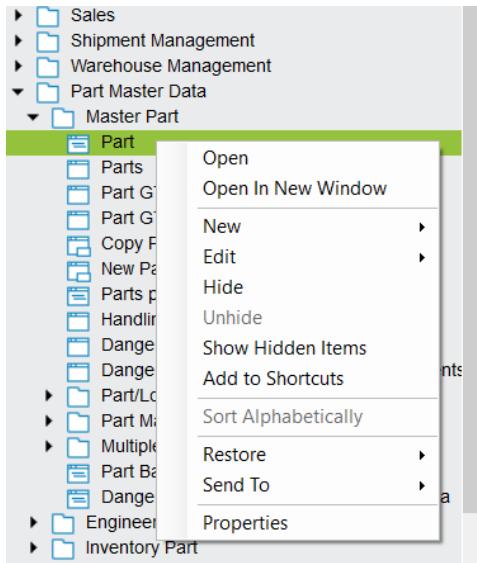


- Marked fields in this screenshot are the search filter fields, usable in both Tree Navigation and Page Navigation.
- The purpose is to help find a specific screen more easily in the folder structure.
- To use, simply start typing the name or part of the name of a screen, and the navigator will filter as the User types.

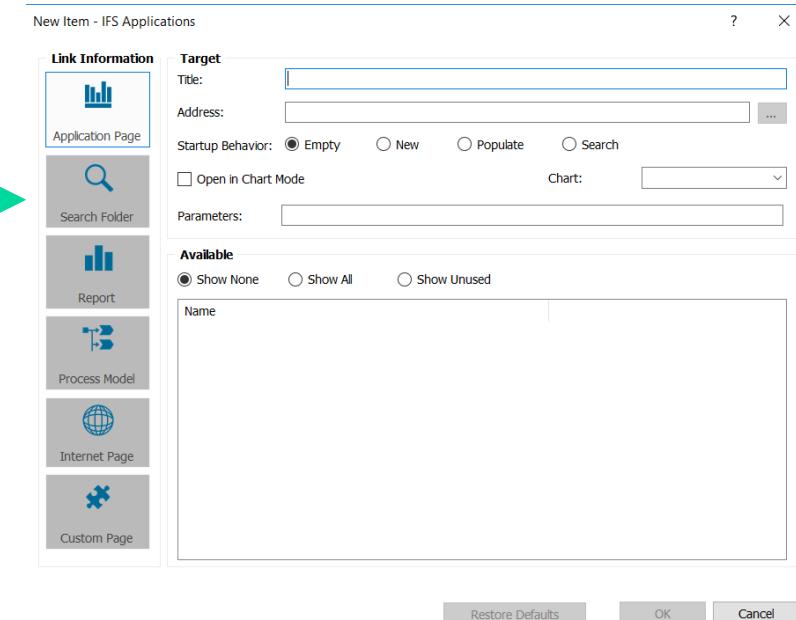
USER INTERFACE

CUSTOMIZING NAVIGATOR

The Navigator can
be customized via
Right Mouse Button



You can also add new items to you Navigator (e.g. Application Pages, Reports, Internet Pages,...)



USER INTERFACE

DETAIL SCREEN

Purchase Order - 100005 - Alain Prost @ EE10-FW-Strike-2092 - IFS Applications

Home < Procurement > Order > Purchase Order

Purchase Order - 100005 ▾ 1 (100) ▾

Order No: 100005 Supplier: 170 Supplier Name: Dunlop Site: 1 Status: Confirmed

Order Code: 1 Description: NORMAL Receipt Date: 10/12/2001 00:00:00 Currency: USD

Buyer ID: * Delivery Address: P Document Address: 1 Coordinator: *

Supplier Contact: Supplier Contact Name: Project ID:

Communicated
 Pending Changes
 Schedule Order
 Centralized
 Consolidated
 Document Text
 Note
 Pre-posting
 Authorization Required
 Authorization Rejected
 Pending Change Order
 Payment Schedules Exist

Header

Part Order Lines **No Part Order Lines** **Rental Part Order Lines** **Charges** **Landed Cost** **Delivery Address** **Misc Order Info** **Authorization** **Order History** **DOP Info** **Work Included**

Line No	Release No	Part No	Part Description	Quantity	Supplier's Part Number	Supplier's Part Description	Purch UoM	Standard Order Qty	Planned Receipt Date	Planned Arrival Date	Planned Delivery Date	V
1	1	58-100	Racing Wheels	10			PCS		31/12/2003 00:00:00	30/12/2003 00:00:00	30/12/2003 00:00:00	3
1	2	58-100	Racing Wheels	20			PCS		31/12/2003 00:00:00	30/12/2003 00:00:00	30/12/2003 00:00:00	3

Detail Lines

Total Net Amt/Base: 3,010.00 Total Net Amt/Curr: 3,010.00 Tot Tax Amt/Curr: 0.00 Total Gross Amt/Curr: 3,010.00

Total Net Weight: 0 Total Net Volume: 0 Charges Total Gross Inc Chrg/Curr: 3,010.00

Tasks Attachments Output Help System Info Lobby

IFS IFS

USER INTERFACE

OVERVIEW SCREEN

Customer Orders - Alain Prost @ EE10-FW-Strike-2092 - IFS Applications

Home < Sales > Order > Customer Orders

Customer Orders

Order No	Site	Status	Additional Discount (%)	Order Type	Customer No	Customer Name	Coordinator	Salesman	Wanted Delivery Date/Time	Agreement ID	Invoice Customer	Order Curren
BP10111	1	Invoiced/Closed	50	10	BP10	Mercedes	*	JAQUES	20/04/2001 00:00:00			DEM
BP10112	1	Invoiced/Closed	0	10	BP8	Honda	*	ALAIN	27/04/2001 00:00:00			USD
BP10113	1	Invoiced/Closed	0	10	BP2	Newman/Haas Racing	*	JAQUES	27/04/2001 00:00:00			USD
BP10115	1	Invoiced/Closed	0	10	BP10	Mercedes	*	JAQUES	07/05/2001 00:00:00			DEM
BP10116	1	Invoiced/Closed	0	10	BP7	Harley Davidson	*	MARIO	04/05/2001 00:00:00			USD
BP10120	1	Invoiced/Closed	0	10	BP1	Team Rahal	*	ALAIN	15/05/2001 00:00:00			USD
BP10121	1	Invoiced/Closed	0	10	BP9	Mercedes	*	MARIO	16/05/2001 00:00:00			DEM
BP10124	1	Invoiced/Closed	0	10	BP2	Newman/Haas Racing	*	JAQUES	25/05/2001 00:00:00			USD
BP10126	1	Invoiced/Closed	0	10	BP6	Ferrari	*	NIKI	08/06/2001 00:00:00			SEK
BP10129	1	Invoiced/Closed	0	10	BP4	Robert Yates Racing	*	NIKI	15/06/2001 00:00:00			SEK
BP10130	1	Invoiced/Closed	0	10	BP5	McLaren	*	ALAIN	18/06/2001 00:00:00			SEK
BP10132	1	Invoiced/Closed	0	10	BP2	Newman/Haas Racing	*	JAQUES	29/06/2001 00:00:00			USD
BP10133	1	Invoiced/Closed	0	10	BP2	Newman/Haas Racing	*	JAQUES	09/07/2001 00:00:00			USD
BP10135	1	Invoiced/Closed	0	10	BP7	Harley Davidson	*	MARIO	17/07/2001 00:00:00			USD
BP10137	1	Invoiced/Closed	0	10	BP3	Hendrick Motorsports	*	DAMON	27/07/2001 00:00:00			USD
BP10142	1	Invoiced/Closed	0	10	BP9	Mercedes	*	MARIO	20/08/2001 00:00:00			DEM
BP10144	1	Invoiced/Closed	0	10	BP2	Newman/Haas Racing	*	JAQUES	24/08/2001 00:00:00			USD
BP10146	1	Invoiced/Closed	0	10	BP1	Team Rahal	*	ALAIN	04/09/2001 00:00:00			USD
BP10147	1	Invoiced/Closed	0	10	BP8	Honda	*	ALAIN	04/09/2001 00:00:00			USD

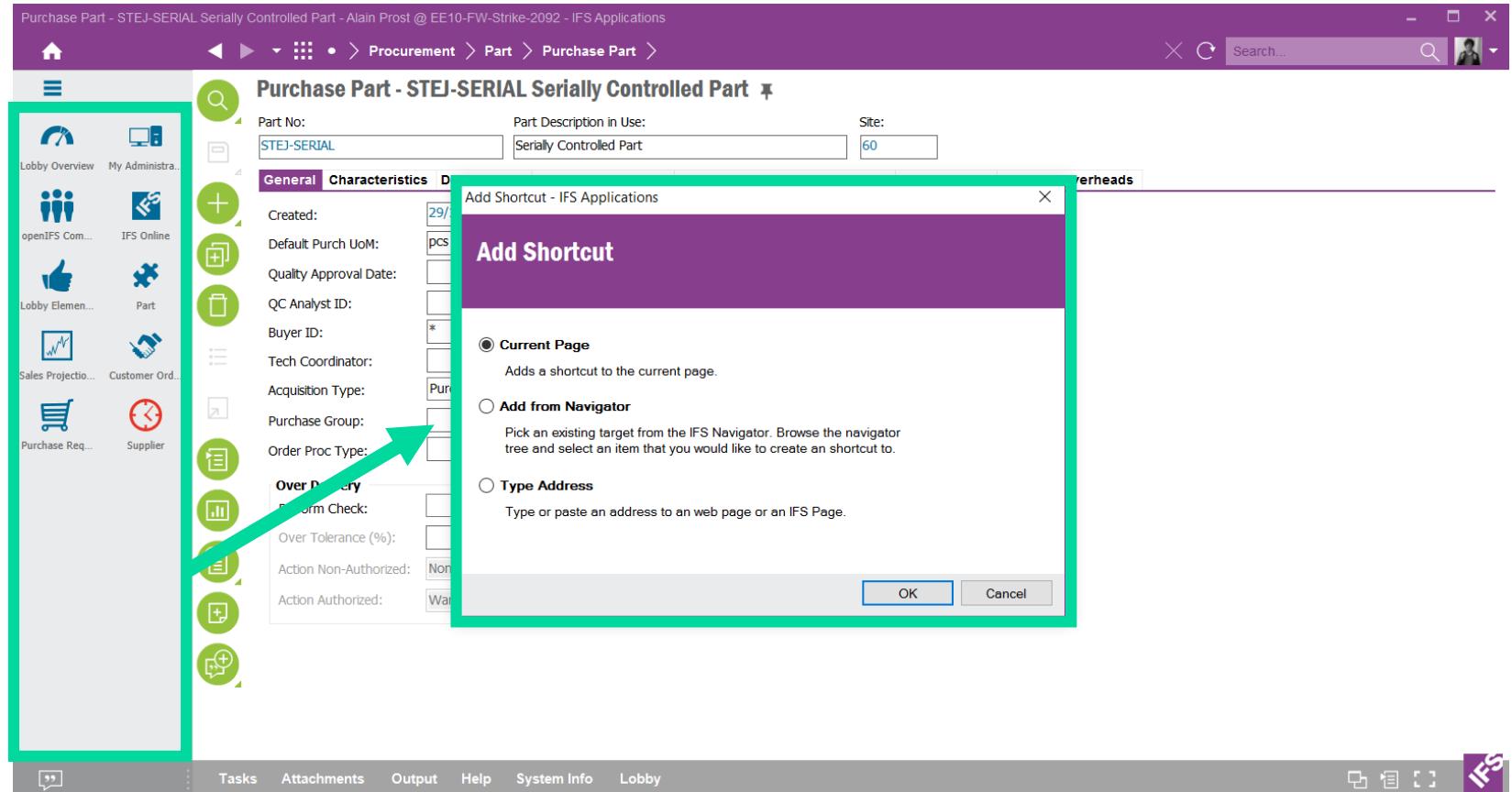
Tasks (5) Attachments Output Help System Info Lobby

IFS

USER INTERFACE

SHORTCUTS

Click Right Mouse Button on Shortcut section to add Shortcuts



USER INTERFACE

PAGE ACTION BAR

Purchase Order - 100005 - Alain Prost @ EE10-FW-Strike-2092 - IFS Applications

Procurement > Order > Purchase Order

Purchase Order - 100005 ▾ 1 (100) †

Order No:	Supplier:	Supplier Name:	Site:	Status:
100005	170	Dunlop	1	Confirmed
Order Code:	Description:	Receipt Date:	Currency:	<input checked="" type="checkbox"/> Communicated <input type="checkbox"/> Pre-posting <input type="checkbox"/> Pending Changes <input type="checkbox"/> Authorization Required <input type="checkbox"/> Schedule Order <input type="checkbox"/> Authorization Rejected <input type="checkbox"/> Centralized <input type="checkbox"/> Consolidated <input type="checkbox"/> Document Text <input type="checkbox"/> Note
1	NORMAL	10/12/2001 00:00:00	USD	
Buyer ID:	Delivery Address:	Document Address:	Coordinator:	
*	P	1	*	
Supplier Contact:	Supplier Contact Name:	Project ID:		

Part Order Lines No Part Order Lines Rental Part Order Lines Charges Landed Cost Delivery Address Misc Order Info Authorization Order History DOP Info Work Included

Line No	Release No	Part No	Part Description	Quantity	Supplier's Part Number	Supplier's Part Description	Purch UoM	Standard Order Qty	Planned Receipt Date	Planned Arrival Date	Planned Delivery Date	V
1	1	58-100	Racing Wheels	10			PCS		31/12/2003 00:00:00	30/12/2003 00:00:00	30/12/2003 00:00:00	3
1	2	58-100	Racing Wheels	20			PCS		31/12/2003 00:00:00	30/12/2003 00:00:00	30/12/2003 00:00:00	3

Total Net Amt/Base: 3,010.00 Total Net Amt/Curr: 3,010.00 Tot Tax Amt/Curr: 0.00 Total Gross Amt/Curr: 3,010.00
Total Net Weight: 0 Total Net Volume: 0 Charges Total Gross incl Chrg/Curr: 3,010.00

Tasks Attachments Output Help System Info Lobby

IFS

USER INTERFACE

PAGE ACTION BAR



Search (F3): Call up Search dialogue (explained further in lesson)



Save (F12): Save last action (will be greyed when not applicable)



New record (F5): Create a new record



Duplicate record (F6): Create a new record by duplicating current record



Delete (F7): Delete existing records



LOV (F8): Call up list of values for currently selected field or column (will be greyed when not applicable)



Zoom (F9): Zoom to connected screen using key value in currently selected field



Context menu: Shows all available context functions. Same as using the RMB menu



Chart: Draw quick charts based on table data



Information Cards: To show more data which is currently unavailable in the selected window



Notes: To add a sticky note to a specific data record



Subscribe: When you wish to be notified about important changes to an object configure a subscription.

STICKY NOTES AND TASKS

Sticky Notes for supporting ad-hoc work:

- Manage ad-hoc notes and contents
- Fast and efficient communication through text, images and links

Sending information and **Tasks** to colleagues:

- Supports ad-hoc communication between colleagues
- Send an Object or (saved) Selection of Objects

USER INTERFACE

STICKY NOTES

The screenshot shows the IFS Application interface for managing inventory parts. The main window displays a record for 'Inventory Part - 20-453 Carburetor Trigger 1 (100)'. The left sidebar contains a navigation tree with categories like Application Base Setup, Financials, Procurement, Sales, Shipment Management, Inventory, Requisition, Part Handling, Warehouse Data Collection, Warehouse Tasks, Distribution Order, Counting, Intrastat Reporting, Quantity in Stock, Transaction History, FSM Transactions, Financial Control, Location, and Part. Under Part, 'Inventory Part' is selected. The main content area shows various details for the part, including its type (Purchased), safety code, accounting group, product code, and family. A large green arrow points from the right side of the screen towards a red-bordered sticky note. The sticky note contains an image of a carburetor, the text 'Carburetor', and a link 'IFS Application owner Today'.

- All Users that visit this record will see the information displayed.
All Users can change information or remove it permanently.
- This example shows text, an image and a link to an external webpage added to the Sticky Note.

USER INTERFACE

TASKS

The screenshot shows the IFS Application interface with the title bar "Inventory > Part > Inventory Parts". The left sidebar contains a navigation tree with categories like Application Base Setup, Financials, and Inventory. The main area displays a grid of "Inventory Parts" with columns for Part No, Part Description in Use, Part Description, Site, Site Description, Alternate Parts Exist, Inventory UoM, and Catch UoM. A context menu is open over the second row, listing options such as "Inventory Part...", "Populate", "Search in Context...", "Edit", "Output", "Quick Chart...", "Conditional Fields...", "Custom Objects", "Properties", "Send To", "Add To Selection", and "Copy To Site". The "Send To" option has a submenu with "Send To Colleague..." and "Mail Recipient as Link". A green arrow points from the "Send To Colleague..." option to the "New Task - IFS Applications" dialog box.

Click Right Mouse Button on the data and send a new task to a colleague...

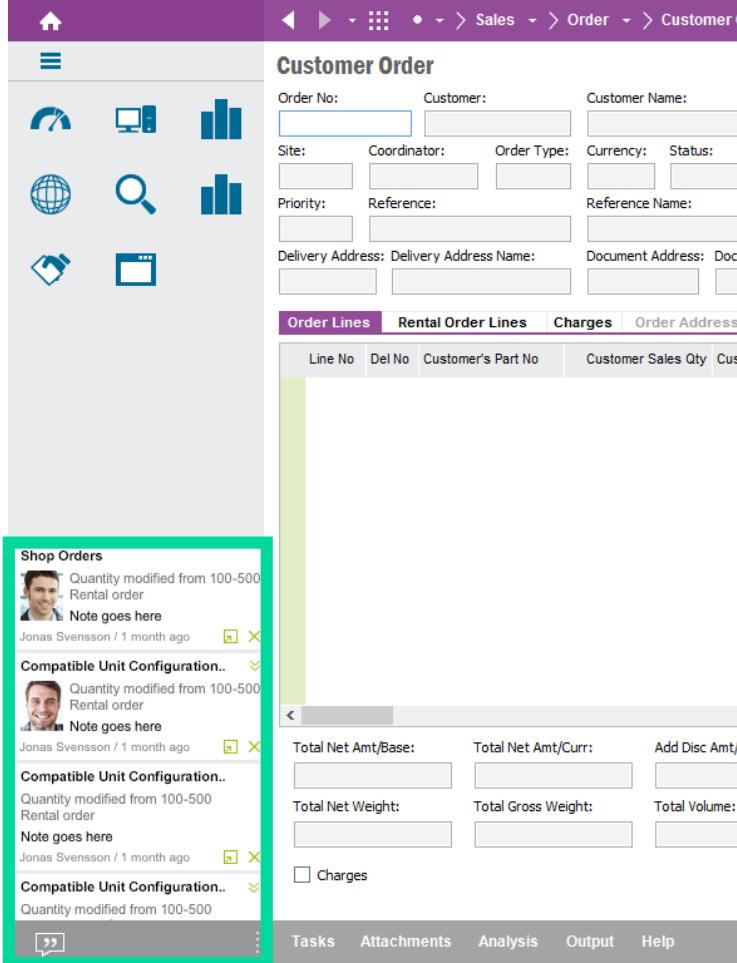
The dialog box is titled "New Task - IFS Applications" and includes the following fields:

- Title:
- Priority:
- Follow Up:
- Due By:
- Notes:

At the bottom are "OK" and "Cancel" buttons. A large green arrow points to the "Title" input field.

USER INTERFACE

STREAMS



Notifications

- Tasks
- Subscriptions
- IFS Talk
- Events
- Reports
- Background Jobs
- Expiration warnings (of Subscriptions)

USER INTERFACE

CONTEXT PANEL - ATTACHMENT

The screenshot shows the IFS Cloud user interface. On the left is a navigation tree with various modules like Financials, Procurement, Sales, Shipment Management, Inventory, Part, Handling, and more. A green box highlights the 'Inventory Part' node under the 'Part' category. The main workspace displays a record for 'Inventory Part - 20-453 Carburetor Trigger'. The 'General' tab is selected, showing details such as Part Type (Purchased), Planner (NIKI), Inventory UoM (pcs), and Asset Class (N). Below the General tab, there's a 'Documents' section with a green box around it, indicating attachments. A large green arrow points upwards from the 'Attachments' button in the bottom navigation bar towards the 'Documents' section. The right side of the screen shows a preview of a document titled 'Copy of Carb-Owners-Manual (100%)' with a page number '2 of 4'. The document contains instructions for carburetor installation and a technical diagram of a carburetor with callouts labeled A through I.

- Attachment panel allows simple connection and viewing of Business Object related information
- Examples of Attachments are documents, media, technical sheets , etc..
- User can instantly see if there are Attachments available for a specific record and instantly view any available attachment

USER INTERFACE

CONTEXT PANEL - OUTPUT CHANNELS

- An Export Channel needs to be setup
- After that records can be exported directly from any Overview screen
- “Save as ...” format available via Context Menu
- Channel directly accessible via Context Menu
- Possibility to print using any channel



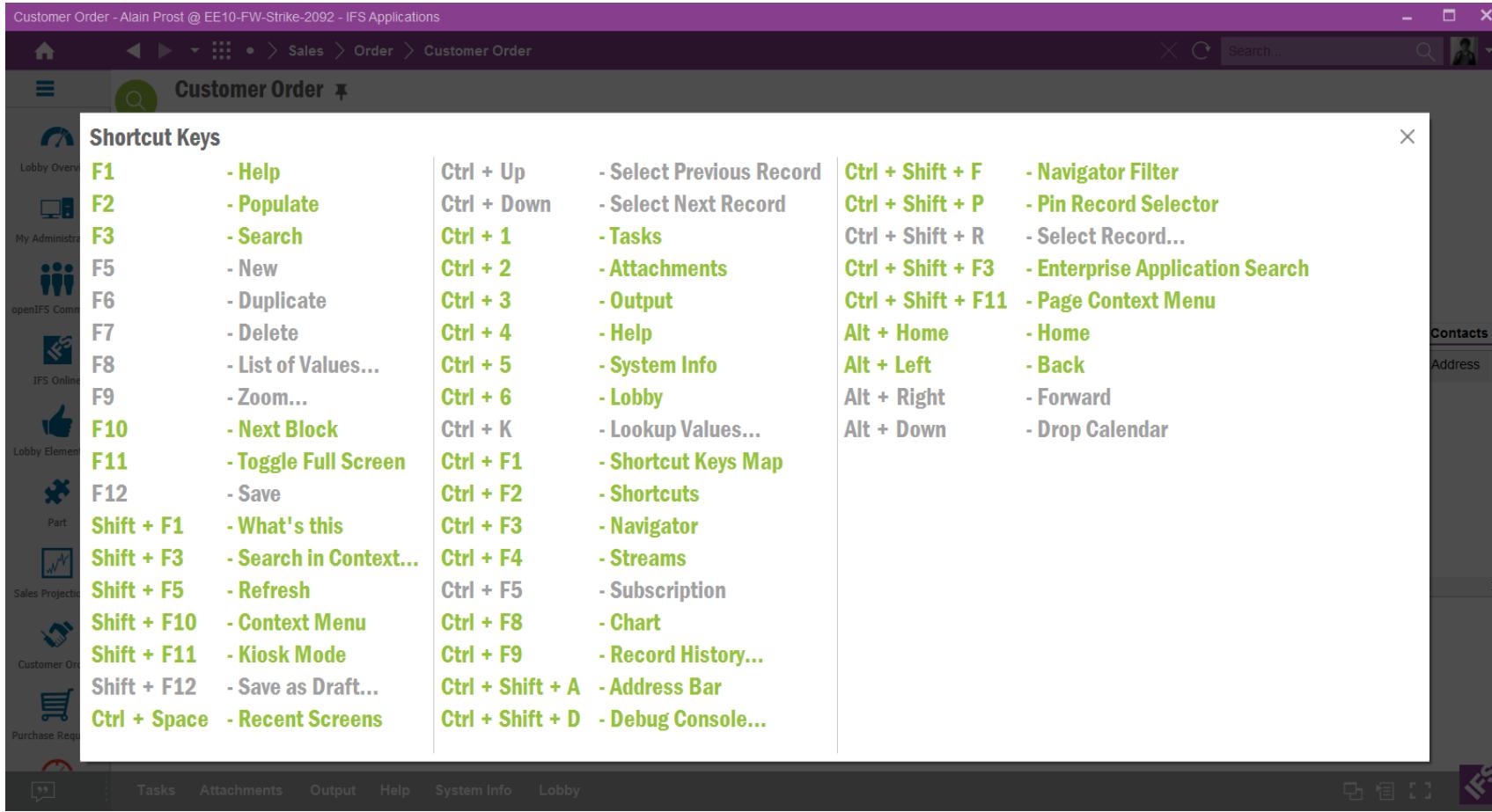
The screenshot shows a list of inventory parts with columns for Part No, Part Description in Use, Part Description, Site, Site Description, Alternate Parts Exist, Inventory UoM, and Catch UoM. A context menu is open over the first few rows, and a modal dialog titled "Output - IFS Applications" is displayed, asking "What do you want to output? (Maximum of 10000 rows)". It has three buttons: "Selected rows only" (highlighted with a green box), "All rows", and "Cancel". The IFS logo is visible at the bottom right.

Part No	Part Description in Use	Part Description	Site	Site Description	Alternate Parts Exist	Inventory UoM	Catch UoM
20-453	Carburetor Trigger	Carburetor Trigger	1	Main Plant	<input checked="" type="checkbox"/>	pcs	
20-330	Ignition System	Ignition System	1	Main Plant	<input type="checkbox"/>	pcs	
20-332	Battery System	Battery System	1	Main Plant	<input type="checkbox"/>	pcs	
24-000	Engine Family	Engine Family	1	Main Plant	<input type="checkbox"/>	PCS	
24-101	Formula Engine	Formula Engine	1	Main Plant	<input type="checkbox"/>	PCS	
24-106	6 - Cylinder Engine	6 - Cylinder Engine	1	Main Plant	<input type="checkbox"/>	PCS	
24-108	8 - Cyl		1	Main Plant	<input type="checkbox"/>	PCS	
24-310	Engine		1	Main Plant	<input type="checkbox"/>	PCS	
81-121	Gray P		1	Main Plant	<input type="checkbox"/>	PCS	
81-200	White I		1	Main Plant	<input type="checkbox"/>	I	
81-210	Black I		1	Main Plant	<input type="checkbox"/>	I	
81-220	Gray P		1	Main Plant	<input type="checkbox"/>	I	
81-301	Contain		1	Main Plant	<input type="checkbox"/>	PCS	
81-502	Paint S		1	Main Plant	<input type="checkbox"/>	I	
81-506	Emulsiner By-Product	Emulsiner By-Product	1	Main Plant	<input type="checkbox"/>	g	
81-510	Paint Stabilizer	Paint Stabilizer	1	Main Plant	<input type="checkbox"/>	kg	



USER INTERFACE

SHORTCUT LIST



Use **Ctrl+F1**
to open the Dynamic
Shortcut Keys Map



OTHER FEATURES

OTHER FEATURES

MODIFY OVERVIEW SCREEN

Click Right Mouse Button on the table heading to modify an overview screen

The screenshot illustrates the process of modifying an overview screen in IFS Applications. On the left, the 'Purchase Parts' screen is displayed with a context menu open over the 'Part No' column header. The 'Column Chooser...' option in this menu is highlighted with a green box and a large green arrow points from it to the 'Column Chooser - IFS Applications' dialog box on the right. The dialog box shows the 'Hidden Columns' section containing 'Part No', 'Part Description', and 'Purchase Part Description', and the 'Visible Columns' section containing 'Site', 'Site Desc', 'Alternate', and several other columns like 'Created', 'UoM Desc', and 'Taxable'. The 'OK' button at the bottom right of the dialog box is also highlighted with a green box.

OTHER FEATURES

CONDITIONAL FORMATTING

Purchase Parts - Alain Prost @ EE10-FW-Strike-2092 - IFS Applications

Purchase Parts

Part No	Part Description	Purchase Part Description	Site	Site Desc	Alternate Parts Exist	Created	Default Purch UoM	UoM Desc	Taxable	Quality Approval Date	QC Analyst ID	Inve
21-331	Starting System	Starting System				Conditional Formatting...	18/09/2001	PCS	piece			
21-332	Battery System	Battery System				Freeze Column	18/09/2001	PCS	piece			
21-342	Water Pump	Water Pump				Hide This Column	18/09/2001	PCS	piece			
21-344	Cooling Line Assy	Cooling Line Assy				Column Chooser...	18/09/2001	PCS	piece			
21-350	Fuel Tank	Fuel Tank				Go to Column...	18/09/2001	PCS	piece			
21-451	T					Set Header Rows	18/09/2001	PCS	piece			
21-454	S					Optimize This Column Width						
21-512	C											
21-513	R											
21-521	I											
21-524	S											
21-900	L											
21-937	D											
510-1	H											
20-360	F											
BP1	B											
BP5	B											
BP10	BP Wheel 14 Alloy	BP Wheel 14 Alloy	1	Main Plant		01/01/2000	PCS	piece				
18-304	Street Car	Street Car	1	Main Plant		24/09/2001	pcs	piece (allow decimals)				

Conditional Formatting - IFS Applications

Based on the value of "Part Description" column, format the cell and rows in the following way.

New Condition Delete Condition Reset Formatting Case Sensitive Column: Part Description

+ Value Text Style Text Color Background Color Apply to Entire Row

BP%

OK Cancel

OTHER FEATURES

TEMPLATES AND DRAFTS

TEMPLATES

- A set of default values when creating a new record in a page
- The Templates you create are stored in your User Profile
- Possible to have several Templates
- Can set a Template as default when creating new records

DRAFTS

- A Draft allows you to save a record without all mandatory fields having values
- Will create a Task to remind you to complete the registration later
- Limitation: only header and general information can be saved this way, not lines

OTHER FEATURES

SELECTIONS

Post @ EE10-FW-Strike-2092 - IFS Applications

Procurement > Order > Purchase Orders >

Purchase Orders

Order No	Order Code	Order Code Description	Status	Supplier	Supplier Name	Site	Total Net Amt/Base	Total Net Amt/Curr
100005	1	NORMAL	Confirmed				3,010.00	3,010.00
200107	1	NORMAL	Released				12,000.00	12,000.00
SCH_2...	1	NORMAL	Stopped				400.00	400.00
200108	1	NORMAL	Closed				0.00	0.00
200109	1	NORMAL	Closed				8,303.13	1,250.00
SCH_2...	1	NORMAL	Stopped				0.00	0.00
100001	1	NORMAL	Released				0.00	0.00
200110	1	NORMAL	Closed				100.00	100.00
200111	1	NORMAL	Closed				220.00	220.00
200113	1	NORMAL	Closed				3,725.00	3,725.00
200105	1	NORMAL	Closed				0.00	0.00
200052	1	NORMAL	Closed	6100	Supplier 6100	60	0.00	0.00
200115	1	NORMAL	Cancelled	SUP1	Suplier 1	70	0.00	0.00
200116	1	NORMAL	Planned	CUST1	Customer 1	70	0.00	0.00
100003	1	NORMAL	Closed	5000	Supplier 5000	1	250.00	250.00
29-001	1	NORMAL	Planned	29-002	Mag Cast Inc.	1	0.00	0.00
29-002	1	NORMAL	Arrived	29-002	Mag Cast Inc.	1	1,180.00	1,180.00

Context menu options:

- Add To Selection
- New Selection...
- Supplier ABC
- Remove From Selection
- View My Selections...

Choose your selection and create a new one via Right Mouse Button

Purchase Orders - Alain Prost @ EE10-FW-Strike-2092 - IFS Applications

Procurement > Order > Purchase Orders > My selection

Purchase Orders

Order No	Order Code	Order Code Description	Status	Supplier	Supplier Name	Site	Total Net Amt/Base	Total Net Amt/Curr
100005	1	NORMAL	Confirmed	170	Dunlop	1	3,010.00	3,010.00
200107	1	NORMAL	Released	171	Nitto	1	12,000.00	12,000.00
200108	1	NORMAL	Closed	ABC	ABC Supplie...	501	0.00	0.00
SCH_2...	1	NORMAL	Stopped	ABC	ABC Supplie...	501	400.00	400.00

Green arrow pointing from the 'Add To Selection' option in the context menu to the 'Add To Selection' icon in the ribbon bar.

OTHER FEATURES

SEARCH DATA



Click here or press **F3** to open the Search Dialog

Search - Purchase Orders

Search - Purchase Orders

Saved Searches: [Previous Search] Match Case

Keywords:

[Hide empty fields](#) [Restore fields](#)

Order No:

Order Code:

Order Code Description:

Status:

Supplier:

Supplier Name:

Site:

Sort by: [none]

SEARCH DATA

SEARCH DIALOG IN FORMS

Counts how many objects that will be retrieved with this search conditions

Search - Customer Orders

Search - Customer Orders

Saved Searches: [No Saved Searches]

Keywords:

Match Case

Order No:

Site:

Status:

Additional Desc:

Customer No:

Customer Name:

Coordinator:

Salesman:

Wanted Delivery Date/Time:

Sort by: [none]



Starts the Search

Saves the search conditions

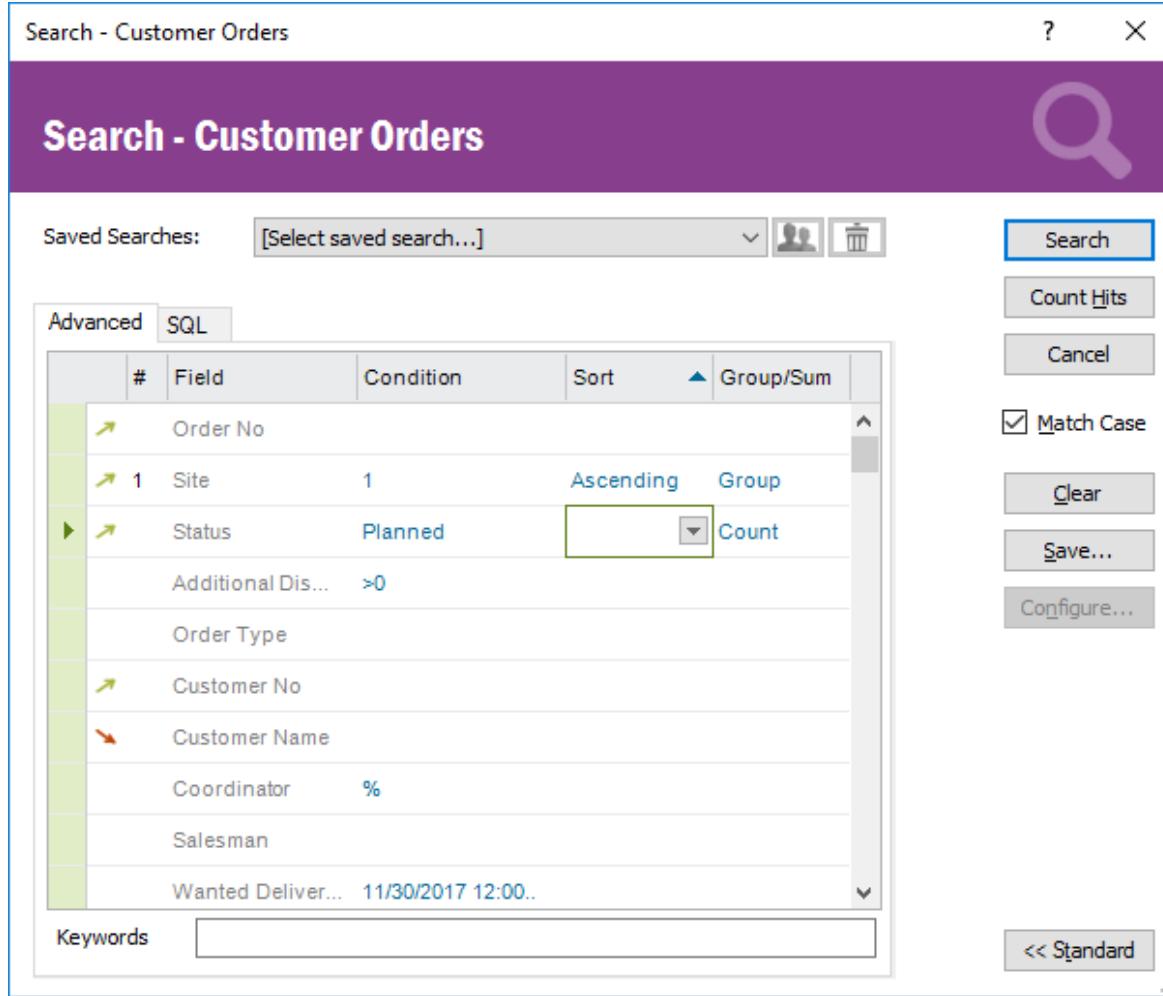
Check this check box to retrieve objects with characters in upper/lower case exactly as specified

Opens the configure dialog

Click here to open the advanced search mode

SEARCH DATA

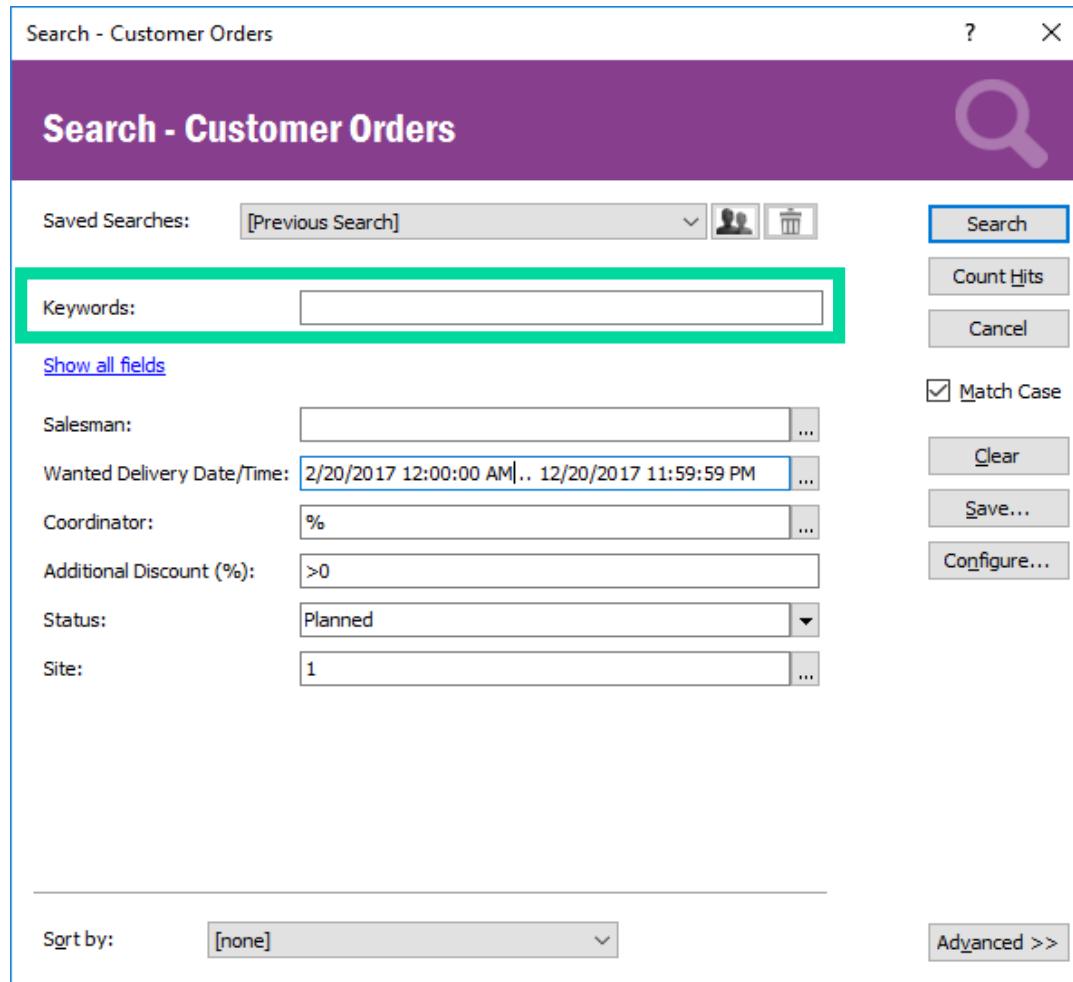
ADVANCED SEARCH



- The **first column** provides Users hints about which columns to use from a performance perspective
- #: This column may be used for sorting. Enter the sorting order starting with 1, then 2, etc..
- **Condition:** This is where you enter the search condition, the same as in the standard Search dialog
- **Sort:** This is where you specify if the sorting should be performed Ascending or Descending
- **Group/Sum:** This is where you specify how to group and summarize the search result

SEARCH DATA

SEARCH WITH KEYWORDS



- The Keyword Search provides the possibility to search by using free text search with keywords, e.g. Supplier Id, Customer Id, Invoice Number etc...
- Simply make a free text search, similar to what you would do in Google
- **Example:** In pages related to Customer Orders you may search for keywords such as Order No, Customer No, Customer Name, Customer PO No. etc.. without having to use the specific search fields in the Search dialog.

SEARCH DATA

AVAILABLE SEARCH CONDITIONS

Symbol	Condition	Example
=	Equal to	Enter New York for the City attribute to retrieve all Customers located in "New York".
<>	Not equal to	Enter !=New York for the City attribute to retrieve all Customers located outside of "New York".
%	Any value Zero or more characters without limitations	Enter New% for the City attribute to retrieve all Customers located in a city beginning with "New" (New York, New Orleans etc..).
!	No value	Specify ! for the City attribute to retrieve all Customers for which city has not been specified.
_	Any character	Single character without limitations. Enter _e% for the City attribute to retrieve all Customers located in a city with an "e" as the second character.
>	Larger than	Enter >100 for the Customer ID attribute to retrieve all Customers with an ID greater than "100".

SEARCH DATA

AVAILABLE SEARCH CONDITIONS

Symbol	Condition	Example
<	Less than	Enter <100 for the Customer ID attribute to retrieve all Customers with an ID less than "100".
>=	Larger or equal to	Enter >=100 for the Customer ID attribute to retrieve all Customers with an ID greater than or equal to "100".
<=	Less or equal to	Enter <=100 for the Customer ID attribute to retrieve all Customers with an ID less than or equal to "100".
+	Checked	Enter + in the Valid field to retrieve all Customers for which the valid check box has been checked.
-	Unchecked	Enter - in the Valid field to retrieve all Customers for which the valid check box has not been checked.
..	Between	If you want to include values 5, 6, 7, 8, 9, 10, the Condition would be 5..10.
;	Or	Specify New York; Philadelphia
!A;B	Not A and not B	Specify !New York; Philadelphia for the City attribute to retrieve all customers not located in New York and not in Philadelphia

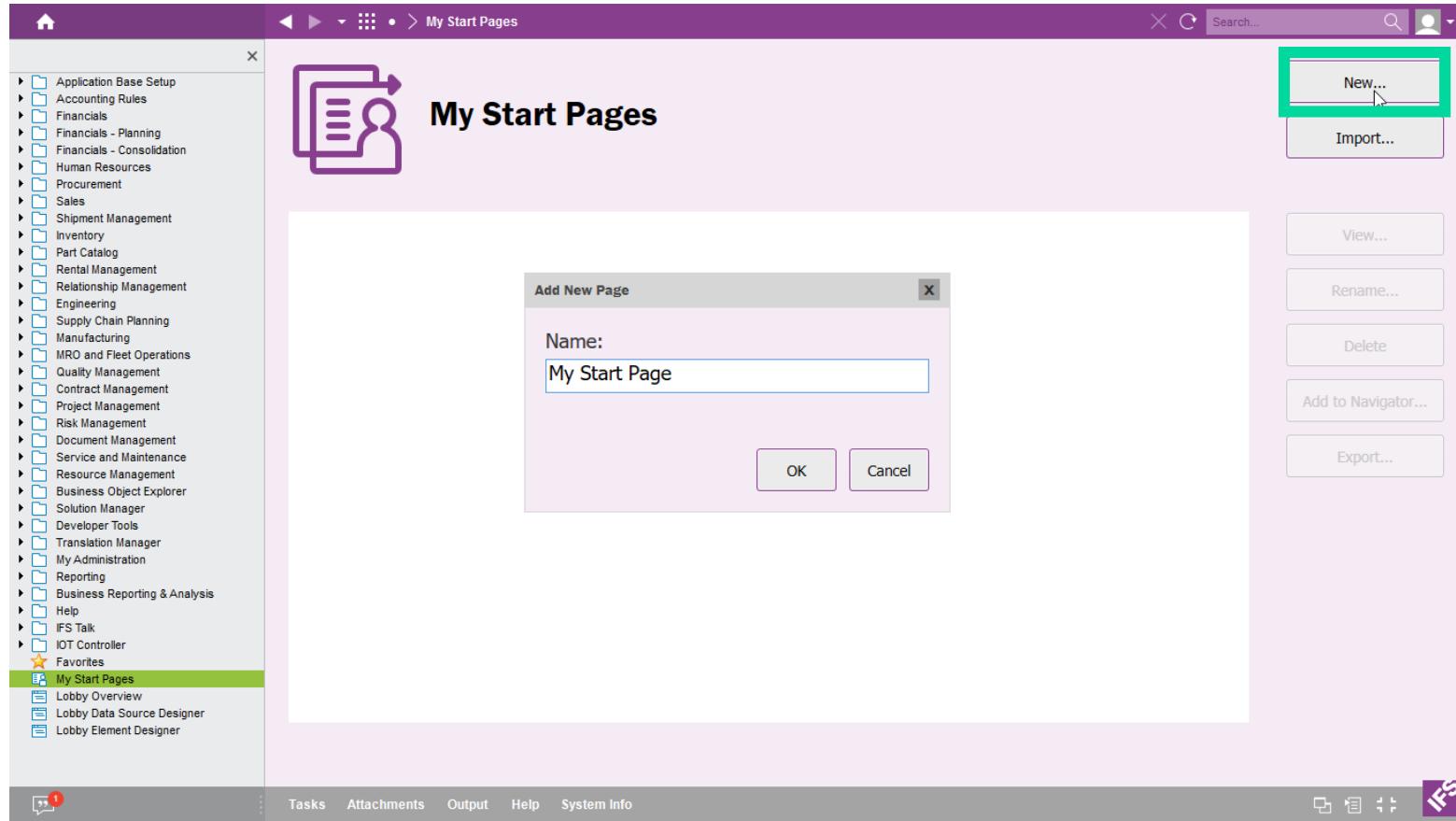
SEARCH DATA

EXAMPLES OF CONTEXT SUBSTITUTION VARIABLES

Name	Data Type
END_OF_LAST_MONTH	Date
END_OF_LAST_WEEK	Date
END_OF_LAST_YEAR	Date
START_OF_NEXT_MONTH	Date
START_OF_NEXT_WEEK	Date
START_OF_NEXT_YEAR	Date
TODAY	Date
TOMORROW	Date
USER_EMAIL	String
USER_ID	String
USER_LANGUAGE	String
YESTERDAY	Date
DEFAULT_COMPANY	String
NUMBER_OF_LAST_MONTH	Number
NUMBER_OF_THIS_MONTH	Number
NUMBER_OF_NEXT_MONTH	Number

MY START PAGE

CREATE YOUR START PAGE

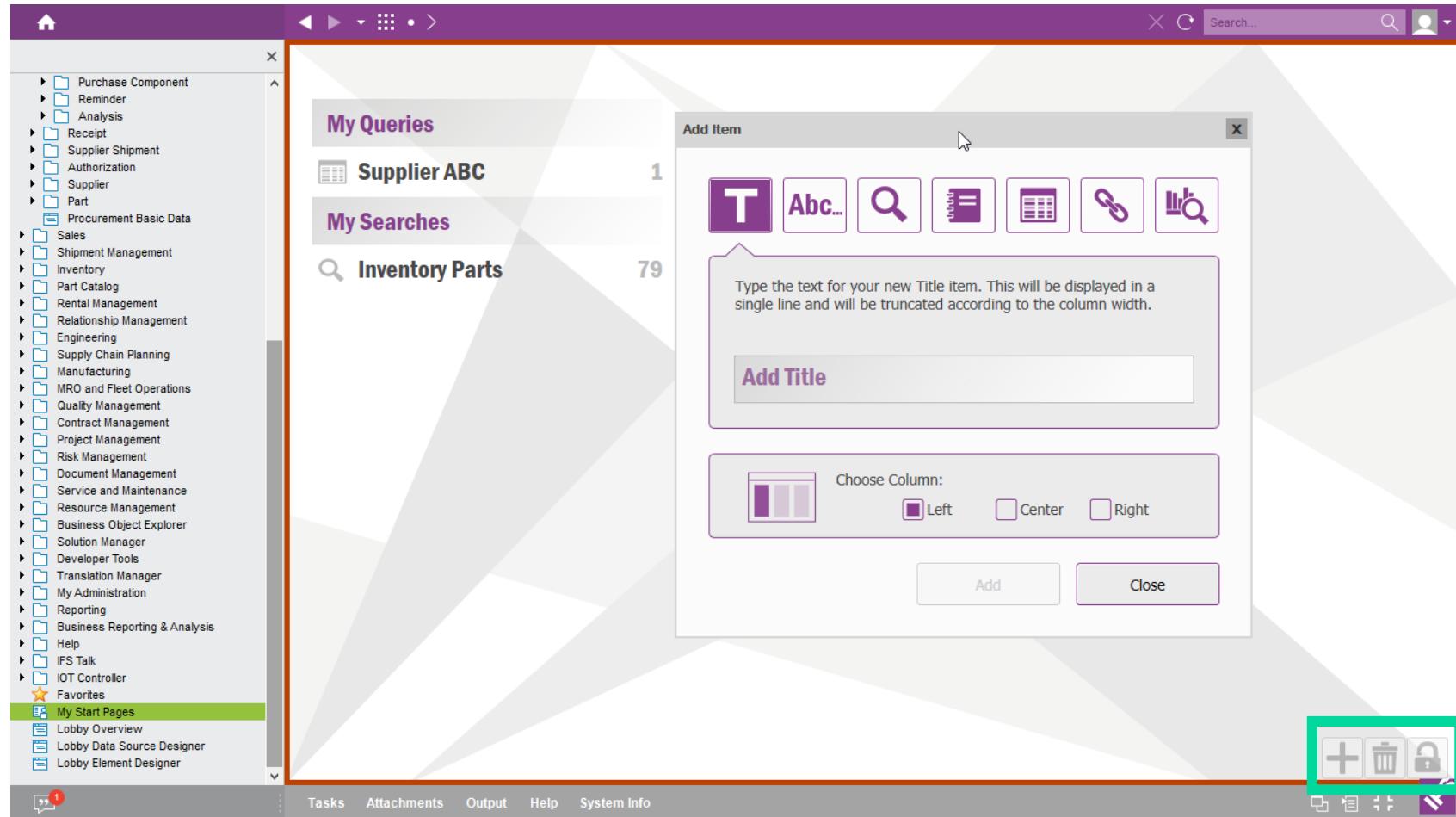


Go to the My Start Pages screen, click New button, name your page and press OK.

Then select your page and press the View.. button on the right to open your Start Page.

MY START PAGE

SETUP YOUR START PAGE



Unlock the page for editing by clicking the Lock button in the lower right.

Then Add and Delete buttons become available.

IFS LOBBY

OVERVIEW

WHAT IT IS

IFS Lobby is a Personal view:

- bringing you closer to what's happening in your business
- bringing you closer to the things you need to do
- bringing you closer to the things you should keep an eye on

BENEFITS

IFS Lobby will..

- make things simple, focused and comprehensible for the users
- monitor and manage by exception
- increase productivity

IFS LOBBY

FROM THIS...

Customer Orders

Order No	Site	Status	Additional Discount (%)	Order Type	Customer No	Customer Name	Coordinator	Salesman	Wanted Del
P16510	1	Released							2014-10-31
P16101	1	Invoiced/Closed							2014-10-22
P15350	1	Invoiced/Closed							2014-10-19
									2014-10-10
									2014-10-22

Sales Contracts

Sales Contract No	Contract Name	Contract Type	Type Description	Customer ID	Customer Name	Customer Category	Contract Status	Currency	Contract Code
C100000000	Customer 1 sales contract	1	Bidding contract	CUST1	Customer 1	Cust	Active	USD	
NA-PROJENT	NA Enterprise Contract	FFP	Firm Fixed Price	NA1000	Customer NA1000	Cust	Active	USD	
KS-1461	Contract Name	2	EPCI Contract	1000	Customer 1000	Cust	Active	USD	

Search - Receive Shop Order

Project Product - 114077 ▼ 1 (97)

Project ID:	Default Site:	MPL Calculation Flag:	Project Name:
DK114077-3	1	Up To Date	114077

Grouped Procurement

Items	Part Definition	Tags	Functions	Function Structure	Spare Part
Item No	Part Number	Eng Rev	Level Standard Name	Part Description	Used In Structure Number of Children

Approvals

LU Name	Object	Object Key	Object Description	Approval Status	Step No	Approval Step Description	Approver	Approver Name	Group ID	Group Description
DociIssue	Document Revision	Document Class: 200, Document No: 1201134, ...	xdgfg	1	Verify design		20	Engineering		
DociIssue	Document Revision	Document Class: 100, Document No: D00171, ...	GIS Map	1	Verify design		20	Engineering		
				1	Verify design		20	Engineering		
				1	Release design		20	Engineering		
				1	test edited 02		20	Engineering		
				1	Verify design		20	Engineering		
				2	Approve design		20	Engineering		
				2	Approve design		20	Engineering		
				3	Release design		20	Engineering		
				10	10		20	Engineering		
				10	ttyt		20	Engineering		

Sub Contracts

Contract No	Contract Name	Contract Type	Contract Type Description	Supplier ID	Supplier Name	Status	Currency Code	Company	Company Name	Site	Si
SYSTESTSUB	test	CONS	Construction	S003	SEK Supplier	Completed	SEK	P10	Project Manufacturing Enterprises		
SYSTESTSUB1	TEST	CONS	Construction	1000	AMG Tire & Rims I...	Awarded	USD	10	IFS Racing USA		
SU-SUB-04	SU-SUB-01 Item level	CONS	Construction	S003	SEK Supplier	Active	SEK	P10	Project Manufacturing Enterprises		
SU-SUB-03	SU-SUB-01 Item level	CONS	Construction	S004	USD Supplier	Awarded	SEK	P10	Project Manufacturing Enterprises		
SU-SUB-06	SU-SUB-01 Item level self billin	CONS	Construction	S003	SEK Supplier	Active	SEK	P10	Project Manufacturing Enterprises		
DI-1	test	CONS	Construction	1000	AMG Tire & Rims I...	Planned	USD	10	IFS Racing USA		
SU-SUB-10	SU-SUB-10	CONS	Construction	1050	int sup in 1	Planned	USD	10	IFS Racing USA		

10 - Supplier Invoice Analysis ▼ 1 (85)

PO Reference:	Sub Contract Reference:	Status:	Currency:	Unique Project ID:	Gross Amount:
	SUB CONTRACT 1	Posted	USD		1000.00
Supplier:	Name:	Supp Grp:	Invoice Identity:	Tax Amount:	
1000	AMG Tire & Rims Inc	0	SI	SUB CONTRACT	0.00

Invitations to Tender

Sales Contract No	Company	Contract Name	Contract Type	Type Description	Contract Status	Site	Contract Reference	Contract Manager	Manager Name	Customer ID
10	P10	I	MK	Construction	Active	M1				1010
1001	P10	TT	2	EPCI Contract	Enquiry	M1				1010
101	10	101	1	Bidding contract	Awarded	1				FR_AIRBUS

Material Requisition Lines

Order No	Line No	Release No	Part No	Part Description	Site	Site Description	Condition Code	Condition Code Description	Internal Customer No
200003	1	1	P04-121	P04-121	42	Rep. Manufacturer			ALAIN
200002	1	1	P04-121	P04-121	42	Rep. Manufacturer			ALAIN
200005	1	1	10802108	Gasket Multi PN40/DN50 (300#2")	70	EAM			
200012	1	1	SK-MUL-P1	-	3	CBS and EAM			

IFS LOBBY

TO THIS...

PROJECT MANAGER Manager=JACKIE

PROJECTS

Project ID	Name
2528	2528
3026	3026
4444444444	4
D_TEST_CLO	Test Cancelled
PRPJ-2669	Bug PRPJ-2669

CPI SPI

1 2 3 4 5 >

ACTIVITY EXCEPTIONS

Exception Type	Count
Late Planned	136
Late Released	198
Cost Exception	68
Hours Exception	43

ACTIVITIES - NEXT 30 DAYS

Status	Count
To Start (Critical)	4
To Finish (Critical)	17
To Start	5
To Finish	17

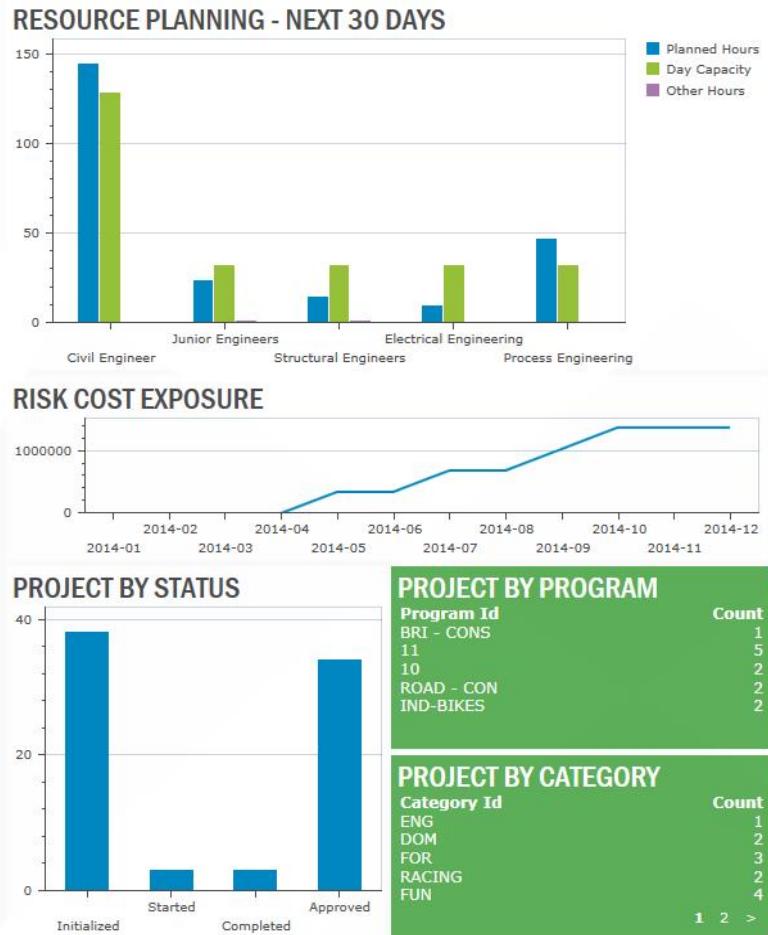
SUPPLIER **CUSTOMER**

Category	Value
Supplier	66.1K
Customer	20.25K

overdue invoices overdue invoices

LATE ORDERS

Order Type	Count
Customer Orders	2
Purchase Orders	9
Shop Orders	2
Work Orders	19



THINGS TO DO

PURCHASING

- PRs to authorize
- Authorize Invoices for Payments
- POs to authorize

RISK

- Risk Analysis to approve
- Risk Actions assigned

LINE MANAGEMENT

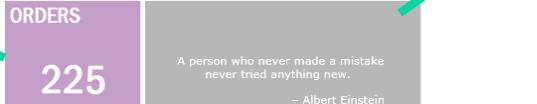
- Expense Sheets to approve

DUE - NEXT 30 DAYS

- Customer Invoices
- Invoice Plan lines
- Supplier Invoices
- Risk Actions

ELEMENT TYPES

Count



Text

Image



MACHINE STATUS

17

Analog Gauge

Catalog Type	STATE	
	Inventory part	Non inventory part
Picked	48	0
Released	603	72
Delivered	34	39
Cancelled	11	33
Partially Delivered	10	0
Invoiced/Closed	1	2
Reserved	11	0

Matrix

List

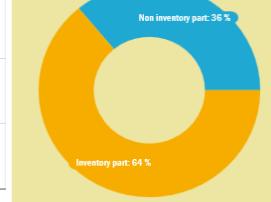
Text



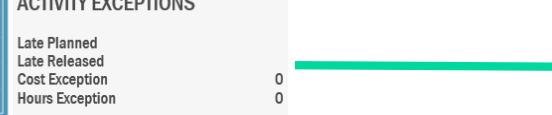
Line Chart



CATALOG TYPE



ACTIVITY EXCEPTIONS



Bar Chart



COMPLETE ORDERLINES %



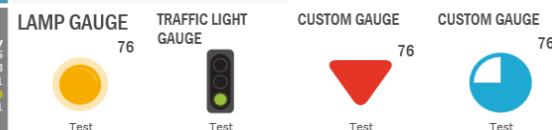
Pie Chart



Radar Chart



KPI



Link List



State Gauge



#forthechallengers

