



IFSworld.com





IFS FSM™ INTRODUCTION & SOLUTION OVERVIEW

IFS ESSENTIALS COURSE – IFS FSM 6

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AGENDA

FSM ESSENTIALS COURSE

01

FSM INTRODUCTION & SOLUTION OVERVIEW

02

FSM CORE ENTITIES

03

FSM CORE PROCESSES

04

BASIC CONFIGURATION AND MOBILE OVERVIEW





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

SESSION AGENDA



01

INTRODUCTION

02

USER
INTERFACE
AND
OVERVIEW

03

APPLICATION
LAYOUT

04

NAVIGATION

05

HELP
FUNCTION

06

WRAP UP

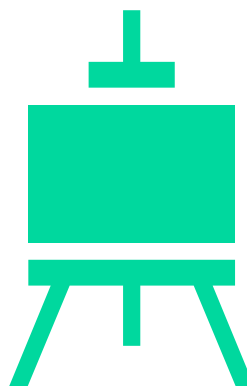


OUR TRAINING APPROACH

HOW WE LIKE TO DELIVER TRAINING

Learning Activities

Facilitator-led instruction
System Demos
Take home Exercises
Knowledge Tests



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

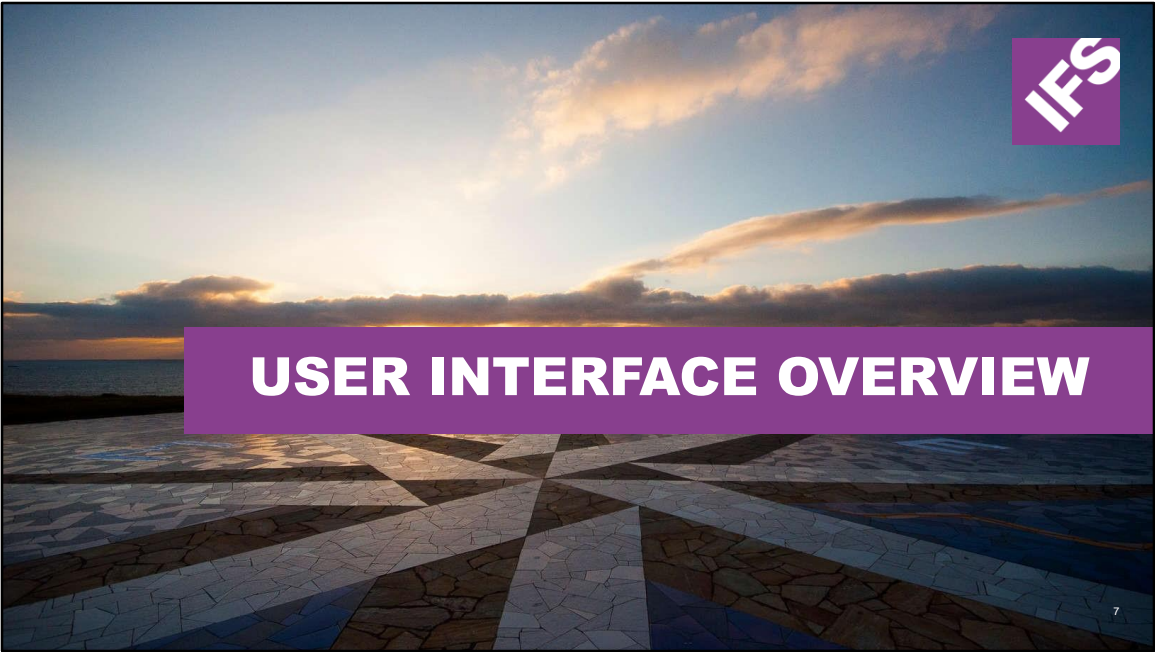
USER INTERFACE OVERVIEW

LEARNING OUTCOMES

By the end of this lesson, you should have:

- Started start and logged into IFS FSM application
- An understanding of the layout of the IFS FSM application
- An understanding of how to navigate around the application
- Learned different ways to find Help







USER INTERFACE OVERVIEW

START IFS FSM APPLICATION – LOCAL CLIENT



Step 1: Click the IFS FSM icon in the Start Menu (it may look different and could also be a desktop icon)

Step 2: Enter your User name and password and click Login

A screenshot of the IFS Field Service Management login window. It features the IFS logo at the top left. Below the logo are three radio buttons: 'Use FSM Authentication' (selected), 'Use Windows Authentication', and 'Change Password'. There are three input fields: 'Person ID', 'Password', and 'Server' (which is a dropdown menu currently showing 'SystemTest'). At the bottom are two buttons: 'Login' and 'Close'. An information icon (i) is located to the right of the 'Server' dropdown.

You log into FSM using either FSM authentication or Windows authentication using the single sign-on feature. When you use FSM authentication, you log in using a person ID and a password. When you use Windows authentication, you log in using your Windows ID and Active Directory domain name in the format of ID@Domain.

Options for logging on:

FSM Authentication: the Person ID value is forced to uppercase, but Password is case sensitive.

Windows Authentication: single sign-on (SSO) with network credentials

Server: multiple endpoints are possible for accessing different environments (e.g. Test and Production)

Check if all Trainees are logged on.

NOTE: User is not case sensitive and Password is case sensitive

USER / PASSWORD

USER INTERFACE OVERVIEW

START IFS FSM APPLICATION – LOCAL CLIENT

Step 1: Enter the URL for the hosted version of IFS FMS

.....FSM2/WebClient/auth/login?auth=fsm

Step 2: Enter your User name and password and click Login



You log into FSM using either FSM authentication or Windows authentication using the single sign-on feature. When you use FSM authentication, you log in using a person ID and a password. When you use Windows authentication, you log in using your Windows ID and Active Directory domain name in the format of ID@Domain.

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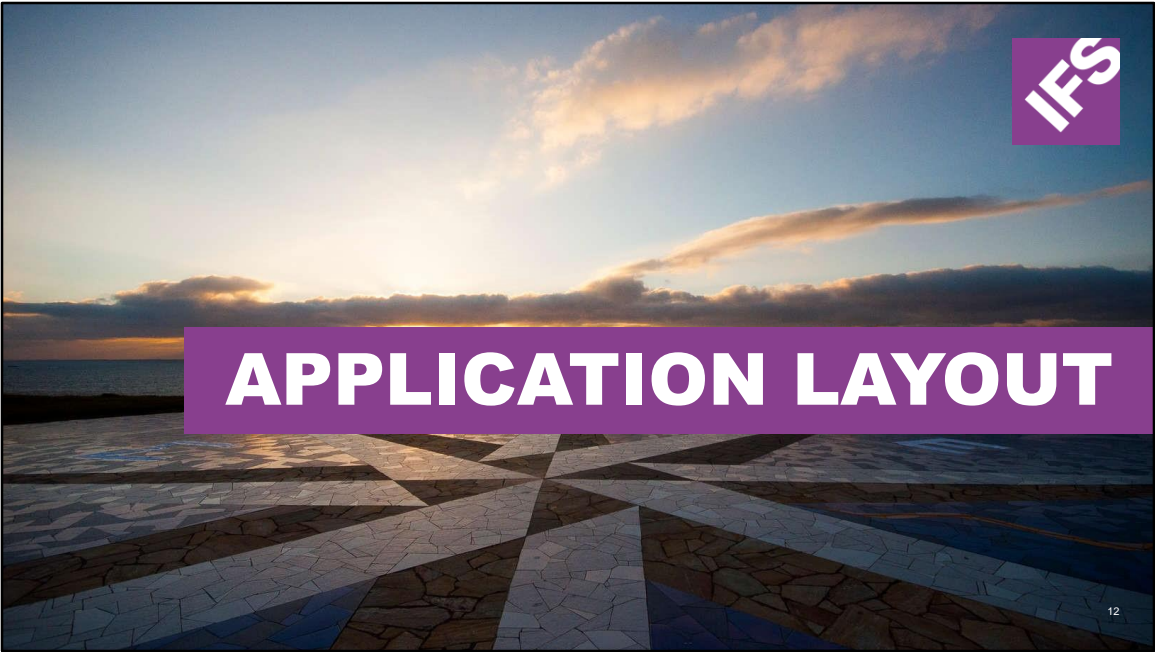
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USER / PASSWORD



Demonstration of the core FSM processes

1. Log in
2. Create a request
3. Add customer, product, contact, customer problem description
4. Select an active contract
5. Dispatch to tech
6. Have tech arrive at customer site using Arrive event
7. Have the tech add labor
8. Have the tech add part usage
9. Create a receive only auto RMA from the request because the product can't be fixed
10. Have the tech leave the site and complete the task
11. Receive the broken unit
12. Fix the broken unit and restock it
13. The request is completed/closed. Create voucher
14. Create invoice from the voucher.



LAYOUT

LEARNING OUTCOMES

By the end of this lesson, you should have:

- Understood the standard screen layout
- Understood there are non-standard screens
- Recognized the different field types
- Recognized the different field properties



LAYOUT

SERVICE MANAGER LOBBY

Global Search

Dynamic resizing slider

First Screen a user is presented with is a dashboard

Known as the Service Manager Lobby

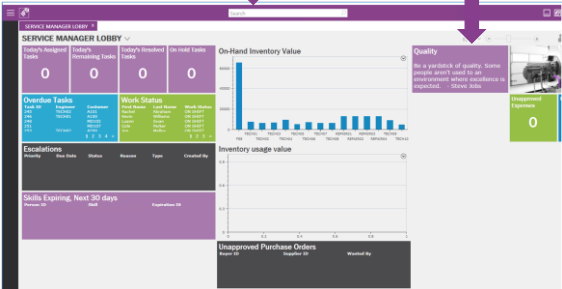
Items can be rearranged via drag n Drop

Or resized using the slider

Top and Center is a System Global Search

The global search interrogates the whole system

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After logging in the user is presented with the Lobby, a dynamic configurable dashboard, providing a snapshot of how the business is performing at that moment in time.

The lobby can be resized using the slider
At the top center of the screen

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LAYOUT

MENU LAYOUT

- FSM system menu is launched via the standard  button

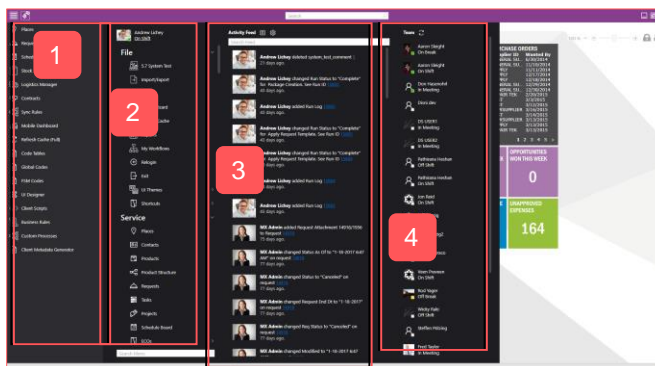
- The menu is divided in to 4 main areas

1 Shortcut Bar

2 Global Smart Menu

3 Activity Feed

4 Team with Skype integration



The FSM **Menu** is a typical Windows application menu providing access to Screens and other Functions. A text box for type-ahead **Menu Selection** is in the bottom of the menu bar. The **Global Search** allows you to search all the records for your search criteria and retrieves the data. We will look at these features more closely in later lessons. The **User and Work Status** is defaulting from the Person record.

As a dispatcher, I want to be able to call field engineers so that I can quickly find out if they can service a high priority task. This allows us to respond more quickly and reliably to high value customers that we have tight SLAs for.

As a repair bench technician, I want to be able to have a video call with a co-worker so that I can get assistance on fixing something I haven't experienced before. This prevents us from having to reassign the work and allows us to resolve repairs quicker. Therefore there is an out of the box integration with **Skype for Business** that allows users to see their co-workers status. Additionally, it allows them to initiate communications with in office and mobile co-workers across multiple channels including instant messaging, VoIP, and video calls.

As a customer service representative, I want to know when someone else makes a change to the records of one of my key customers so that I can immediately follow-up on it. The activity feed feature will not only record and share changes about a record, it will also share any changes to child records. For example, it will tell me when a note has been added to a request I'm watching, or when a product is added to a customer

site. Additionally, any long running process will automatically get added to my Activity Feed so I know when they are completed.

LAYOUT

STANDARD SCREEN/WORKSPACE LAYOUT

1 Open Screens

2 Workspace

3 Workspace Menu

4 Tabs

5 List Views

1

3

2

4

5

PLACE ID	PLACE NAME	ROLE TYPE	STATUS	START DATE	END DATE	NOTE
A100	Aero Corp	Contact				
A800	Aero Electronics	Contact				
HT103	COMSYS	Contact				

In FSM there are standard screen layouts and non-standard screen layouts. This slide we will discuss standard screen layouts. In the upper left hand side, the icon with three bars and three dots is a **menu** hyperlink to give you an easy interaction between rows and/or lists. Data can be color coded so it is easier for the users to determine priority of information. The **Workspace** panel contains Header information as well as multiple **Views** of detailed information in **Tabs**.

LAYOUT

NON-STANDARD SCREEN LAYOUT

■ Lookup fields (magnifying glass icon)

■ Pops up Lookup screen

Charlie Weller

Last Name: Weller

First Name: Charlie

MyInfo: Mr

Contact ID: 116

Address ID: 16

Address: 2000 N Grandview Blvd
Waukegan, WI 53188
US

Comments:

Details | Notes | Places | Service History | Attachments

PLACE ID*

A100

A400

HT103

PLACE NAME

Aero Corp

Aero Electronics

COMSYS

FSM2 - Address Lookup

Clear

Search

Done

Address ID: 16

Address: 2000 N Grandview Blvd
Waukegan, WI 53188
US

City: Waukegan

State: WI

Zip: 53188

Place ID: 16

ADDRESS ID

NAME

STREET

CITY

STATE

ZIP

COUNTRY

16

Aero Medical HQ

2000 N Grandview Blvd

Waukegan

WI

53188

US

The majority of screens used by typical users are Standard screens. However, there are several other screen patterns that have different layouts.

The **Lookup** icon (magnifying glass) on fields pops up a Lookup screen.

There are **Search** Form and Search Results panels with the ability to select data. If a query finds a single match, you are taken directly to the edit screen. Also, if enabled, the **New** button will change the view to a Workspace view.

Examples: Place ID on REQUEST, Calendar on PERSON, Product Family/Product Name on PRODUCT.

There is a variety of **other** screen patterns that are typically used for administrative purposes. Many examples can be found from the Admin menu.

Examples such as Logistics Manager and Contracts Manager.

LAYOUT

NON-STANDARD SCREEN LAYOUT

▪ Search

▪ Search for summary data with optional action

▪ Additional Functions can be available

▪ Administrator views

My Requests

General

Place

Contact

Product

Other

Description

Request ID

Status

Action

Priority

Type

Group

Owner

Created

Contracts Manager x

⏪

⏩

⏴

⏵

FUNCTION

Contract PM Request Generation

Contract Renewal

Contract Copy

IFS

The majority of screens used by typical users are Standard screens. However, there are several other screen patterns that have different layouts.

The **Lookup** icon (magnifying glass) on fields pops up a Lookup screen.

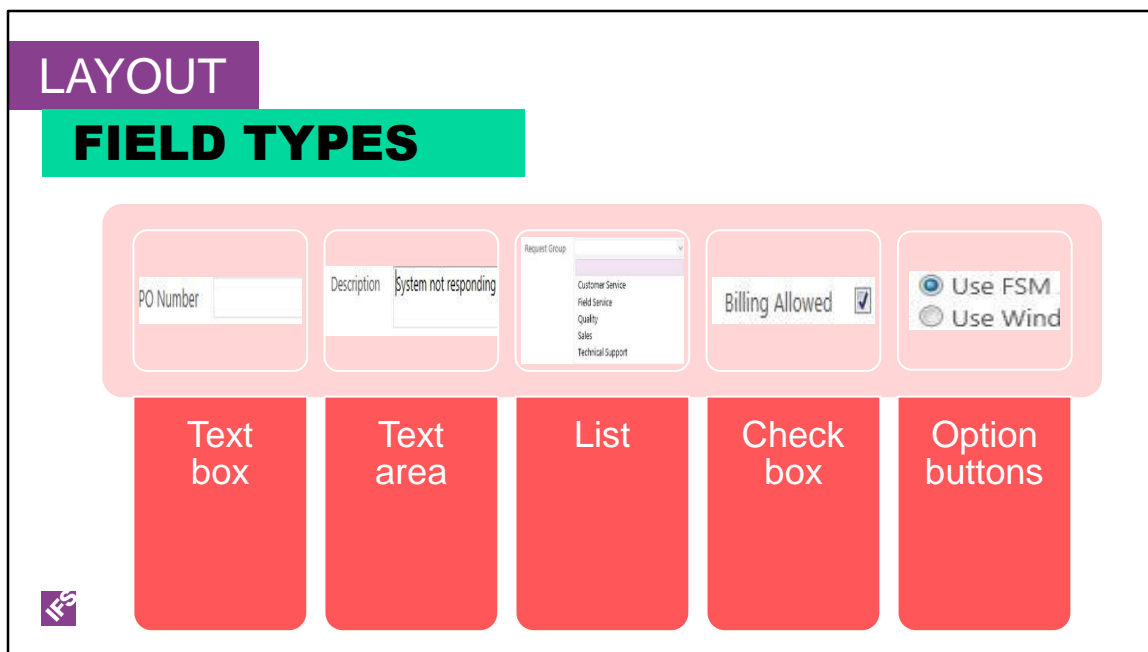
There are **Search** Form and Search Results panels with the ability to select data. If a query finds a single match, you are taken directly to the edit screen. Also, if enabled, the New button will change the view to a Workspace view.

Examples: Place ID on REQUEST, Calendar on PERSON, Product Family/Product Name on PRODUCT.

There is a variety of **other** screen patterns that are typically used for administrative purposes. Many examples can be found from the Admin menu.

Examples such as Logistics Manager and Contracts Manager.

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There are several types of editable fields within FSM.

Text box allows users to manually key information into a field. Text boxes may be restricted to certain data types, such as numeric or date/time.

Text area allows users to store a large amount of text in one field. Typically the text areas will show multiple lines of text.

List is often referred to as a combobox or drop-down list. A list field allows users to select a value from a list of pre-defined values, typically from code tables.

Check box stores a Yes/No value in a field. The values allowed in the database are N, Y or null.

Option buttons is often referred to as radio buttons. Option buttons allow the user to select one option from several choices.

LAYOUT

FIELD PROPERTY FORMAT TYPES

Read Only

Required

Mandatory

Other

Numeric

Text

With formatting rules

E.g. UPPER CASE

Address ID16

Address2000 N Grandview Blvd
Waukesha, WI 53188
US

Comments

Last NameWeller

First NameCharlie

Travel ZoneZone 1

Status ConditionActive

Time ZoneUTC-06:00 Central Time

SatisfactionGreen

External Reference

External System ID

NoteDemo

LocaleEnglish (US)

Latitude43.037732

Longitude-88.177271

CalendarCustomer Calendar

Posting Group01

Blanket POUPPER CASE

Scheduling Resource

PO Required

Allow Products

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There are several properties that affect the various field types.

Required fields mean data must be entered in required fields before the record can be saved. By default, required fields have a red Asterisk(*) at the end of the field.

Read Only fields display information that the user is not able to edit. The background of these fields is gray and the font is faded.

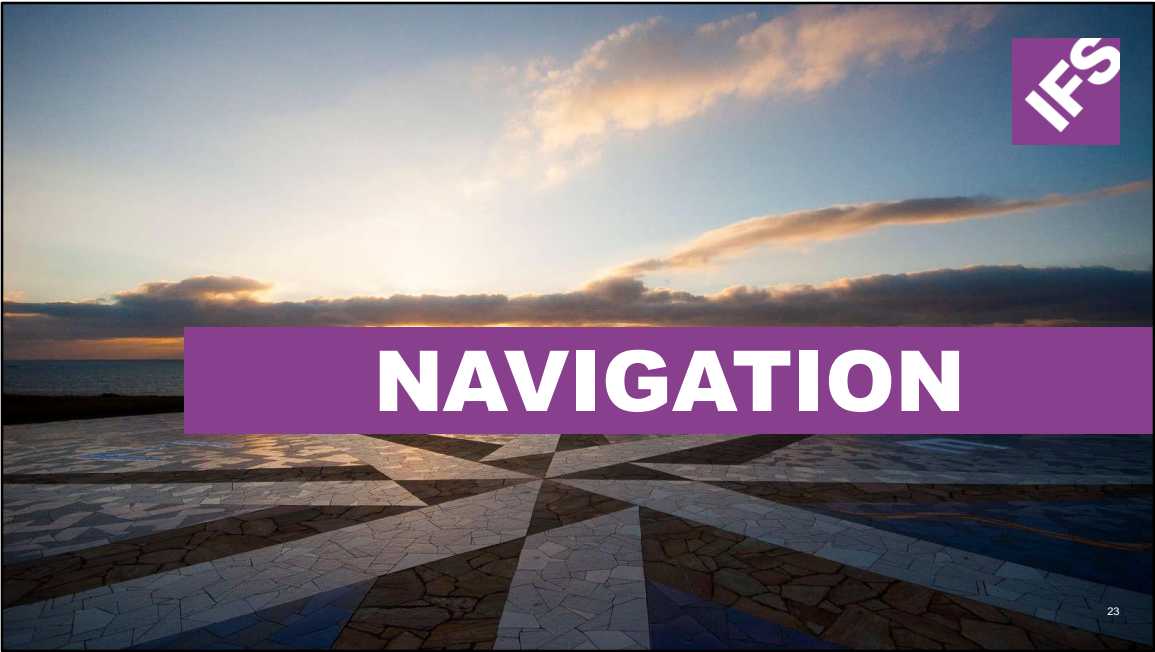
There are several **other** properties of fields that will be discovered during FSM training, to include:

- Numeric Types can limit number of decimals and set allowable ranges
- Text fields can limit the number of characters
- Various masking properties can force UPPER CASE or require specific formatting of a text entry.

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1. Show how to log on to the application.
2. Show the Menu Launcher and the Global Smart Menu
3. Show a standard screen (Person) and non-standard screens (Place lookup from Person, Search on Person, Contracts Manager)
4. On the Place screen, point out the different field types with required and read only fields
5. On the Request screen, click New and then perform lookup on Place ID to open the Lookup screen. Show how a new Place record can be added by clicking the New button.



NAVIGATOIN

LEARNING OUTCOMES

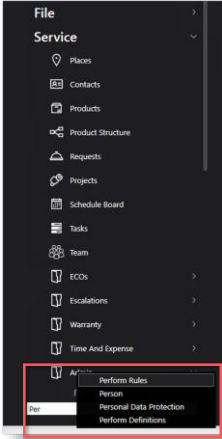

By the end of this lesson, you should have:

- Understood how to open screens from the Global Smart Menu or Quick Screen Jump text box
- Known there are ways to edit records
- Known there are ways to view record details
- Recognized there are keyboard shortcuts




NAVIGATION

MENU NAVIGATION



- Global Smart Menu
 - Grouped in logical sections
 - Allows for custom grouping
- Quick Screen Jump
 - Allows for quick search navigation to a screens
 - Uses type ahead



Screens may be opened by selecting them from the Global Smart Menu. Select screens and functions from the Global Smart Menu. Many screens may be opened at a time. The Global Smart Menu is fully configurable.

Screens may also be opened by using the Quick Screen Jump at the bottom of the menu.

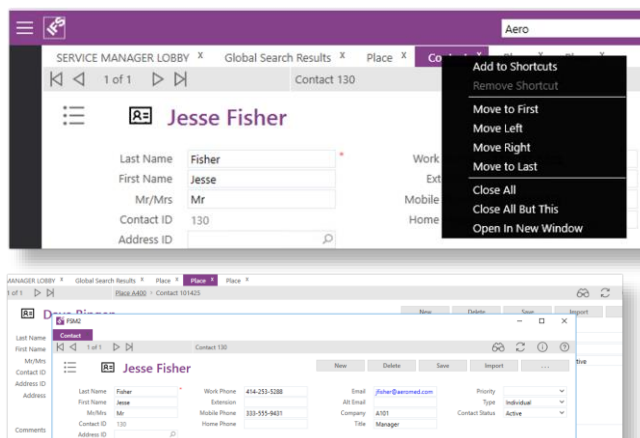
The Quick Screen Jump is a text box for type-ahead menu item selection. You can cycle through list with tab key and select with the mouse or Enter key.

NAVIGATION

MANAGING OPEN SCREENS

Move and Close Screens

- Opened records
- Can be closed
- Reordered
 - Right Clicked
 - Select action from menu
- Open in a New Window



To make your workflow easier, you may want to add, move or remove tabs that you have opened. This is simple to do. Right-click on a screen tab and then select the options to either move the screen or close it. If you have unsaved changes when you attempt to close the screen, you will be prompted with a dialog box. You may also add the screen to the Shortcut menu. We will discuss Shortcuts in the next lesson.

As a dispatcher, I want to be able to undock the Schedule Board screen and drag it to another monitor so that I can manage team schedules while at the same time having access to other screens which allow me to quickly find data that I need to make the best scheduling decisions. As a general user, I want to undock my lobby page so that I can drag it to another monitor so that I can constantly check it whilst still working on my primary monitor. Not only are you able to open multiple tabs of the same screen, but you are also allowed to undock screens (e.g., Schedule Board, SQL Query Tool) and have them on a second monitor. This is a great feature for multi-tasking and troubleshooting.

Note, the Overview tab, where Lobbies appear, cannot be opened to a new window.

In addition, breadcrumbs allow you to jump back quickly to the previous record or to the parent record.

NAVIGATION

EDITING RECORDS AND RECORD DETAILS

Editing Records

- New - Populates default data for entry of a new record
- Copy - Copies data from current record to a new record
- Save - Saves changes to Parent and Child records
- Delete - Removes parent and/or child records

Editing Record Details

- Text Input - Enter arbitrary text, subject to field length and type restrictions
- Table Validated Input - Only specific values are allowed. A List field or Lookup screen provides user with valid values
- Date/Time Fields - Click arrow for Calendar. Format controlled by user's Locale Settings. Display in User Time Zone – Point to field to show UTC and Customer time

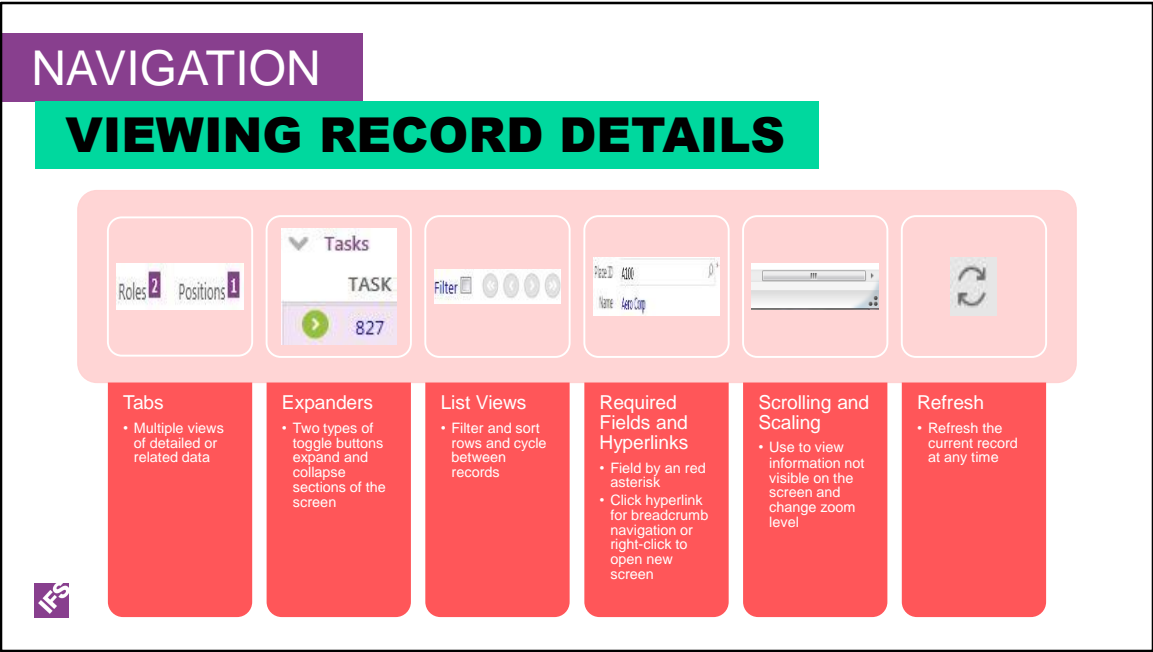


NOTE: Selecting a different record from the Search Results will automatically save any changes a user has made to the current record.

Text Input fields enable you to enter arbitrary text, subject to field length and type restrictions. Most text input fields allow entry of both characters and numerals. In the application, you can use the right mouse click to bring up different menus depending on where you have your pointer. Most fields, except for drop-down lists, will allow you to cut, copy and paste in and out of the application.

Table Validated Input in certain fields only allow specific values to be entered. List fields and the Lookup icon (magnifying glass) on a text box provide users with a method to select valid values. If a user enters an invalid value in a table validated text box, the border of the text box turns red.

Date/Time Fields may be entered manually or the user can click the arrow icon in the field to open a Calendar to select a valid date/time. The date/time format is controlled by the Locale Settings on the user's PC. Any times shown are in the user's local time zone. Placing the cursor over the field may also show UTC and Customer time.



Tabs are on most standard screens have tabs to show multiple views of detailed or related data.

Expanders are represented by two types of toggle buttons expand and collapse sections of the screen. They are a grey arrow and a colored arrow. The color is dependent on UI theme you chose.

List Views show many records in a sortable list in the tabs of standard screens or in the workspace of some non-standard screens. By default, 25 records show at a time, and arrow buttons allow the user to change page. Multiple columns may be selected for filtering and sorting the records. To see all the records in the list view without having to page through them, right-click to "Set Page Size" and "All"

Required fields are red labels followed by an asterisk.

Hyperlinks are a hyperlink for breadcrumb navigation or right-click to open in a new screen. Hyperlinks are items in blue.

Scrolling and Scaling is represented by the three dots in the bottom right hand corner of the application. Both horizontal and vertical scroll bars may be present when data does not fit within the user's desktop. The overall size of UI elements can be changed by using the scaling options at the bottom right of the application.

Refresh refreshes the current record at any time. User will be prompted if changes have been made. This may be used to undo any changes made to the record since it

was last saved.

NAVIGATION

RIGHT-CLICK FUNCTIONS

List Views

ADDRESS*

7201 S. 76th St.

Clear Sort

Previous

Next

Set Page Size

25

50

100

All

Copy

Common View


Phone414-427-8100

Alt Phone

CopyCtrl+C

CutCtrl+X

PasteCtrl+V



In the application, you can use the right mouse click to bring up different menus depending on where you have your pointer. Most fields, except for drop-down lists, will allow you to cut, copy and paste in and out of the application.

In the List Views section of the Workspace, you can right-click to set the page size of the search results. A right-click context menu allows the user to show All or a different number of records, e.g., 25, 50, 100. If you choose to select All records, it is not necessary to use the page arrows to view all the records.

NAVIGATION

VIEWING RECORD DETAILS

Shortcuts	What does it do?
F1	Online Help
F2	Open Lookup or Breadcrumb
F5	Refresh (current record)
Ctrl + Q	Previous Tab
F11	Expand/Restore Details
Shift + F11	Show Workspace
Ctrl + F11	Show Result List
Ctrl + F	Move to Search
Ctrl + M	Show/Hide Menu
Ctrl + N	New
Ctrl + S	Save
Ctrl + Shift +F	Screen Filter
Enter	Search (with cursor in the Search panel)



These global keyboard shortcuts are visible from within the File menu. Specific screens may have additional keyboard shortcuts.



1. On the Request screen, show the Screen Shortcuts
2. Use the Quick Screen Jump text box to find and open the Tasks screen (tab through the items listed after typing “ta”). Show the following:
3. Add a new part usage and show the Work Date field
4. Delete the part usage record.
5. Show:
 - Refresh (after changing data on the record without saving)
 - Point to the Plan Start field to show UTC and Customer Time
 - Tabs
 - Expanders
 - List views (Sort and Filter)
 - Hyperlinks (both Click and Right-Click)
 - Screen Scaling
 - Undock the Schedule Board
6. Show some keyboard shortcuts



HELP

LEARNING OUTCOMES


By the end of this lesson, you should have:

- Understood the different options from the Help menu
- Known there are additional ways to get field or screen help
- Recognized the IFS FSM version recognition
- Knowledge of the functions on the Search Panel
- An understanding of functions on the Search Result and able to search for records from the Search Panel



HELP

HELP MENU

About	• Software version/environment details
About Current Record	• Modified/Created details
View Information	• Screen and Field information
My Profile	• User's Person record
My Settings	• User's screen personalization records
Save Screen Settings	• Select to save screen personalization
IFS Support Online	• Opens web browser to IFS Portal
 XML Log	• Access all messages to/from the server

The Help menu contains information about the user and the application.

About contains the version and build number for your IFS installation.

About Current Record brings up the created by/created datetime and modified by/modified datetime for the screen you are on.

View Information brings up the screen and field information for the screen you are on. This is extremely useful when looking for actual database field names and message IDs.

My Profile is another way to get to the logged on Person record. This is useful for users to update their calendars especially if the Admin menu is hidden for that user.

My Settings is used in conjunction with **Save Screen Settings**. 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**.

XML Log can be helpful in diagnosing issues with the application. It will display the last messages to and from the server.

Additional help can be found in other ways:

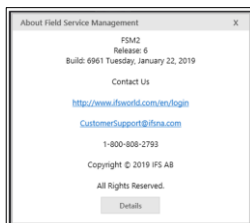
Double-click a **field label** to view table and column descriptions. Note that the system can be configured to provide custom descriptions by using Message Translations.

Click the **Help icon** or press F1 to bring up online documentation.

From the Reports screen, run the **“M5 Metadata Report”** for a report to give metadata for the tables.

HELP

PRODUCT RELEASE CYCLES



Release 6.6961

Release

- 1st number
- (6)



Build

- 4th number
- (6961)



Additional information about FSM appears on the About window. To view this window, on the **Help** menu, click **About**.

This window contains the version and build number for your IFS installation. It is very important that IFS Support and Services know the version and build you are on when you are submitting issues.

Release is the first number is the release number. In the example above, the release is **five**.

Major Revision is the second number is the major revision number. In this example, the major revision is **seven**.

Minor Revision is the third number is the minor revision number. In the example, the minor revision is zero (0). This is known as the Service Pack. R&D will only support the latest minor revision released.

Build is the build number further identifies a version of FSM. It is used internally by IFS and for troubleshooting purposes. In the example, the build number is 6401. Build numbers also can be translated into group patches. Group patches are released every quarter. Group patches are comprised primarily of bug fixes; however, occasionally enhancements may be included.

Additional information appears when you click Details. This information is used for troubleshooting purposes and may vary depending on the installed release, service pack level, and patch level. It is important that you send all the details to IFS Support when you open a case.

SEARCH

SEARCH AND RESULTS PANEL

1

By default it displays the advanced search box

2

Clicking the **Expansion** icon displays the advanced search

3

Advanced Search is field context based

4

The Search results are listed at the bottom of the screen

2

1

Search

3

General

Screen Name: Quick Search ID: Person ID: Title:

SCREEN NAME	PUBLIC SEARCH	PERSON ID	TITLE
TASK		98765432	
PLACE	N	ADMIN	In Store
PERSON	Y	CSR	Aero Corp
QUOTE_TEMPLATE	Y	CSR	All Field Techns
			All Templates

The Search Panel is found at the top of the application. It is divided into 2 sections: Advanced Search and Basic Search. The expander button allows you to expand and collapse the Search Panel. On most screens, there are additional tabs to help narrow your search.

Search Panels offer two choices for searching – Basic Search and Advanced Search -- based on enabling or disabling the **global_search_enabled** application parameter. If the application parameter is enabled, text entered in the Advanced Search textbox will only be compared to records of the primary table associated with the screen, not child tables. The search field must be in the search criteria. If your organization uses an Oracle database, global search is case insensitive, but all other searches are case sensitive.

Search Variables

You can use search variables to replace dates, times, persons, or places when performing searches. If you specify a date without specifying a time, the time of 00:00:00 is assumed.

Modifiers can be added to the Today and Now search variables. The modifiers appear after the search variable, separated by a period (.). If a negative number is specified, the value is subtracted instead of added.

Search Examples

Either of two values, (place_ID is being used here)—**214|213** will return results that contain the two place IDs.

Does not match specified value—**!CLOSED** returns results for all values except for closed.

Any like values—**GE*** returns results for any value that begins with GE, such as GE101, GE245 and so forth. An asterisk (*), a substitute for one or more characters, or percent (%), a substitute for one or more characters, can be used.

Today— **>today** will return results from the current day after 00:00.

Earlier than a specified date— **<01/01/2020** will return results for earlier than but not including January 1, 2020.

<today returns results for earlier than today.

Later than a specified date— **>=01/01/2020** will return results later than and including January 1, 2019.

Within a specified date range— **>=01/01/2020 + <=01/07/2020** will return results later than and including January 1, 2020, and earlier than and including January 7, 2020.

The Search Results section is directly under the Search Panel. Click the hyperlink to be taken to the record.

SEARCH

LIST FIELDS MULTIPLE SELECTIONS

For Fields with multiple allowed values

1 E.g. Drop downs

Multiple Values can be selected in the search at once

2 Hold Shift

3 Select Values

4 Search will run for checked values

Zip

Country

Country (Multiple Selections)

Australia

Austria

Canada

China

Finland

France

Germany

Greece

Ireland

Israel

Italy

Japan

Spain

Sweden

Switzerland

United Kingdom

United States

In the Search Panel, when using Lists for search criteria, multiple values may be selected by holding down **Shift** (on the keyboard) and clicking on the desired values. Once an value is selected, a check will be displayed next to it.

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SEARCH

GLOBAL SEARCH

1 Global Search

- Searches all records in the system

2 Returns all matching results

- Listed by Entity

1

2

2

2

The screenshot shows the IFS Global Search interface. At the top, there is a search bar with the text 'Franklin' entered. Below the search bar, the results are displayed in three sections: 'Place', 'Person', and 'Addresses'. The 'Place' section shows a table with columns: PLACE ID, WINCHSE PLACE, CATEGORY, PLACE NAME, and PLACE STATE. The 'Person' section shows a table with columns: PERSON ID, FIRST NAME, LAST NAME, JOB TITLE, WORK PLACE, and PERSON GROUP. The 'Addresses' section shows a table with columns: ADDRESS ID, NAME, ADDRESS, and CITY. Red boxes and numbers highlight the search bar (1), the 'PLACE NAME' column (2), the 'LAST NAME' column (2), and the 'CITY' column (2).

PLACE ID	WINCHSE PLACE	CATEGORY	PLACE NAME	PLACE STATE
PNS-7	Retail store	New Market	Highway Franklin	Active

PERSON ID	FIRST NAME	LAST NAME	JOB TITLE	WORK PLACE	PERSON GROUP
MOOREVER	Thomas	Franklin		683	J

ADDRESS ID	NAME	ADDRESS	CITY
21	Highmark HQ	6537 S 27th St	Franklin
562	Ball 470	5525 W Rawson Ave	Franklin
587	Highway	7201 S 78th St	Franklin

Global Search is found at the top of center of the application. Global Search searches all records in the application and retrieves all the records that match that criteria. In our example, if we entered “Franklin”, the search results will be the place name of “Franklin”, a person’s last name of “Franklin” and addresses with a city of “Franklin”.



Show the Search Panel on the Request screen

Open the Request screen via the hyperlink

Search for records created between certain dates, using modifiers for at least one date

Search for records with multiple selections of Request Status values

Search using wildcards, comparators and operators

Use the Global Search to search for records in the application.



WRAP-UP