

FSM 6: Essentials
**Introduction &
Solution Overview**

IFS Academy



Welcome

- Agenda: The Course & Today
- Practical Information & Safety
- Our Training Approach
- About the Course & Learning Outcomes



YOUR TRAINER

Name:

Contact number:

Email:

Agenda

FSM Associate Course

- 01 FSM Introduction & Solution Overview
- 02 FSM Core Entities
- 03 FSM Core Processes



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

Agenda – Day 01

- 01 Introduction to IFS
- 02 Introduction to Field Service Management
- 03 User Interface Overview
- 04 User Interface Personalization
- 05 Navigation



Practical Information & Safety

- Our Venue for Today
 - Facilities & Access
 - Fire Alarms & other safety information
- Course Timings
 - We'll try to stick to the agenda!
 - Breaks
- Phones
 - Silent please ☺
 - If you need to take/make a call
- Respect



GROUND RULES & HOUSEKEEPING WELCOME TO THE COURSE!

Overview of the building; staying in the same room for the course etc

Toilets are in X location

Drinks available in X location

Access to the building/room – any times when the room will be locked/unavailable

Fire alarm procedure / any tests planned?

Any other information notified by the venue

We will aim to stick to the timings laid out in the course agenda as closely as possible; this is so that we have time to get through all of the material

If you have additional questions that we don't have time for, please make a note of them and we can discuss them at the end of the day, or follow up after the course

The breaks are included in the agenda; if the group wishes to change any of these break times, we'll try to accommodate that, but we must ensure we cover the agenda and that this suits all of the participants

Please put your mobile phone to silent and only answer in case of emergency, otherwise use breaks to call back. When answering during the course, please leave the class room without interrupting the course

We understand that you may have other priorities to deal with while you are here; but there is a lot to cover in this course, and we'd really appreciate it if you could give us your full attention whenever possible.

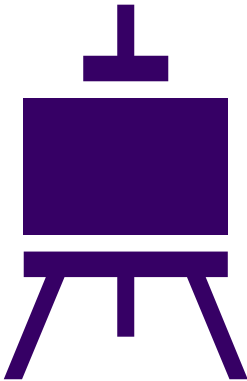
The most important thing while we are all together over the coming hours/days, is that we each show respect for the other people in the room, regardless of their background, knowledge, experience or any other factor. Let's try to make it an enjoyable few days!

Our Training Approach

How We Like To Deliver Training For Our Employees & Partners

Learning Activities

Facilitator-led instruction
System Demos
Hands-On
Activities
Review Sessions
Knowledge Tests



Learning Approaches

Outcomes-based
Field Service context-based
Practically, functionally-based
Peer-learning



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

ABOUT THE COURSE

THIS COURSE IS THE IFS FSM™ ASSOCIATE COURSE

THE AIM OF THE COURSE IS TO GIVE DELEGATES A SOLID UNDERSTANDING OF THE IFS FSM SOLUTION, WHICH WILL ALLOW THEM TO SUPPORT A CUSTOMER IMPLEMENTATION OR PRE-SALES

Unlike some of our other courses, the IFS Associate Course is not split into individual, separate modules (although there are sections within the course, but you have to complete all 5 days). The reason for this is that FSM is a large, complex solution which encompasses many business processes.

Once you have completed this course, the 'Expert' level course is more modular and participants can then choose to focus on different aspects

Learning Outcomes

Introduction To IFS FSM & Solution Overview



By the end of this section of the course, you will be:

- Able to explain the IFS solution structure and how FSM fits within it
- Able to confidently navigate around the IFS FSM user interface (UI)
- Able to share a basic understanding of the Field Service Management process and concepts
- Able to personalise the user experience, and quickly find relevant data or screens within the system





1. Introduction To IFS



It All Started With A Tent

Our founders pitched a tent
on the site of our first
customer

...we have worked close to
our customers ever since



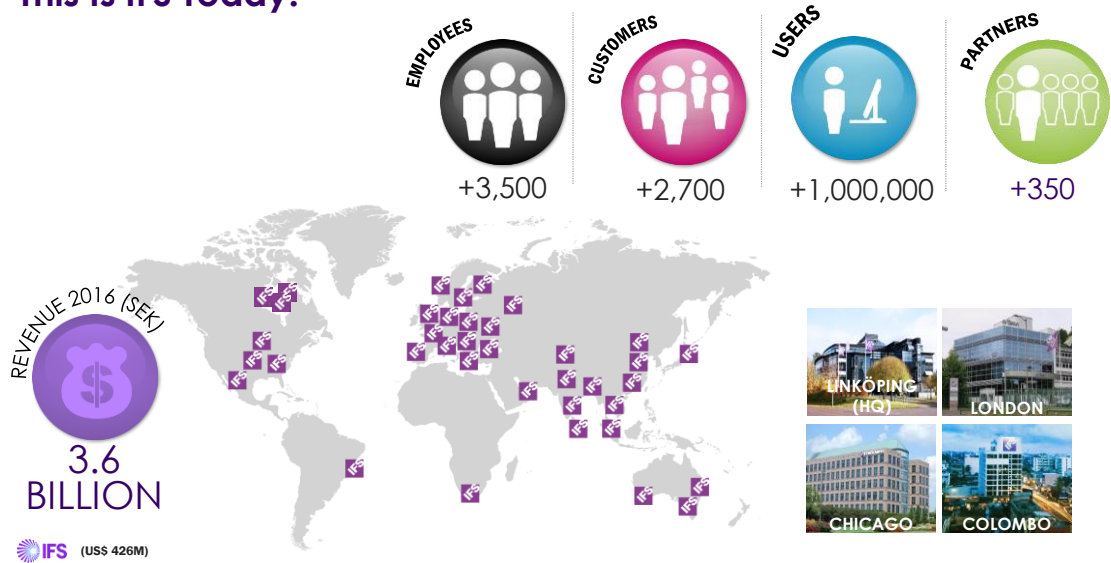
In the early 1980s, four young Swedish engineering undergraduates found themselves an interesting summer job helping a nuclear power plant in southern Sweden carry out its annual maintenance review. It was a first for them, but they made up for any lack of experience with loads of enthusiasm, a can-do attitude—and a somewhat unusual proposal for their employers. To be able to work 24-hour shifts and be on hand to respond immediately to issues that arose, they would camp outside the power station! That's right, camp! In a tent! It says a lot about the confidence they instilled in their employers that the power plant management gave them the green light. The students spent the entire summer working close to the customer, helping to organize and streamline the nuclear power plant maintenance processes. But more importantly, they delivered on their promise of round-the-clock responsibility for their undertaking, in the process re-organizing the entire review procedure and creating the embryo of IFS's world-leading asset lifecycle management software. More than 30 years later, the nuclear power plant, although decommissioned, remains an IFS customer, with IFS solutions providing document management support for the entire decommissioning process until long after the last brick has been removed and placed in storage—a true cradle-to-grave solution.

The tent itself is long gone, but its spirit lives on. Innovative solutions, closeness to our customers, a willingness to understand their industries and their challenges, and an eye for solutions that stand the test of time...these are what IFS and its people are today. We have a unique culture built on keeping things simple, being committed to what we do and always staying close to our customers. We think that is the best way of achieving our goal of making the customers successful.

[

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This Is IFS Today!



Today we are a global company, working with some of the world's largest businesses, and in addition to leading products that are praised by both customers and analysts, we like to think it is our way of working that brought us here.

[Feel free to replace with localized version from appendix.]

Our Portfolio



IFS APPLICATIONS

IS A LEADING, INTEGRATED APPLICATION SUITE FOR THE GLOBAL, FAST-MOVING COMPANY

IFS FIELD SERVICE MANAGEMENT

IS A TRULY COMPLETE END-TO-END FIELD SERVICE MANAGEMENT SOLUTION PRAISED BY ANALYSTS

IFS ENTERPRISE SERVICE MANAGEMENT

FACILITATES HIGHER PRODUCTIVITY AND INCREASED ACCURACY FOR BETTER SCHEDULING

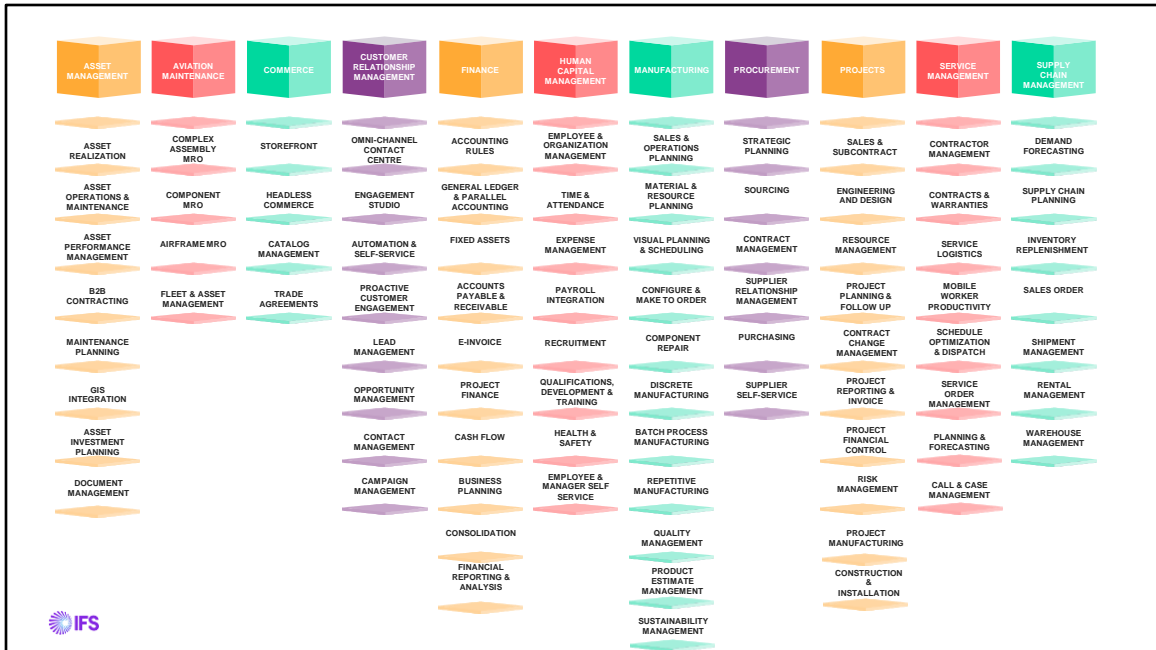
IFS ENTERPRISE OPERATIONAL INTELLIGENCE

ENABLES COMPANIES TO REVIEW AND ORCHESTRATE PROCESSES THAT ALIGN WITH THEIR BUSINESS STRATEGY

IFS MAINTENIX

HELPS AVIATION AND DEFENSE ORGANIZATIONS DRIVE GREATER EFFICIENCIES AND PROFITABILITY IN MAINTENANCE OPERATIONS





IFS Applications is a single, integrated application suite that enables global and demanding businesses to successfully handle 4 core processes:

Service & Asset Management

Full Enterprise Asset Management (EAM), Maintenance Repair and Overhaul (MRO) and Field Service Management (FSM) capabilities.

Manufacturing

Enterprise Resource Planning (ERP) with support for process manufacturing, discrete manufacturing and demanding manufacturing modes.

Projects

Project Management is a core component and can be leveraged as Project-driven ERP, Project Portfolio Management (PPM) and more.

Supply Chain Management

As a support function for ERP and EAM or as a powerful logistics solution in demanding environments like aerospace and defense.

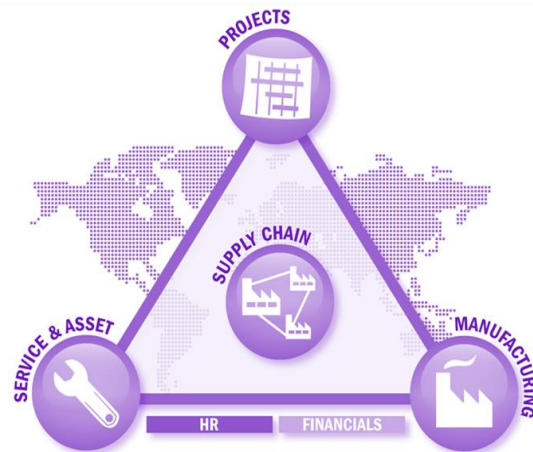
IFS Applications includes financials, human resources, quality management,

document management, customer relationship management (CRM), business intelligence, sustainability management and other core functionality to facilitate full lifecycle management of products, assets, customers, projects and more.

SERVICE EXCELLENCE THROUGH INNOVATION

**IFS Sri Lanka, Research & Development,
Field Service Management**

Investing In Four Core Business Processes



As a company progresses over time, its needs may change. IFS supports companies that have requirements in one or more of the four core processes shown on this slide. The idea is to develop solutions that are based on a way of working, rather than on functionalities alone. That is we start with the customer's business processes and build software based on them, rather than the processes having to adjust to limitations in our solutions.

A company may be heavily focused on one of these core processes, manufacturing for instance, but may want to look at using a more project-based methodology in their workplace. Since our solutions are already designed to accommodate these processes, there is no need to redesign or rework the solution in order to shift focus from one process to another – it comes right out of the box with IFS.

Our Research & Development is focused on these core processes to ensure good industrial fit moving forward.

IFS Acquisition OF Metrix Service Management

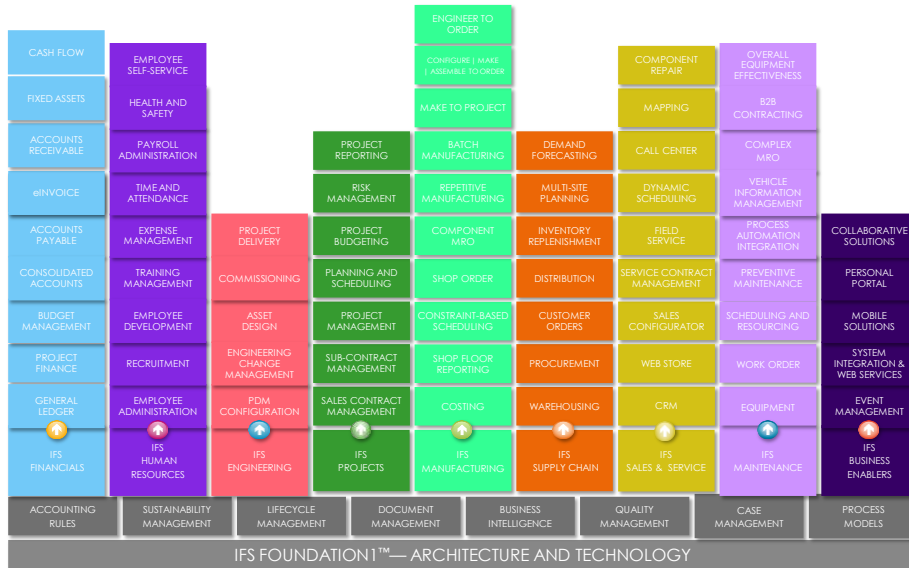
- Metrix was founded in 1980 in the USA
- 100% focused on providing advanced Mobility & Service Management applications
- Development and support located in Milwaukee, WI USA
- Metrix was acquired by IFS in 2012
- Integral part of Global \$400M USD Software Company
- The acquisition strengthens IFS's market position in the high-growth global Mobility & Service Management application market



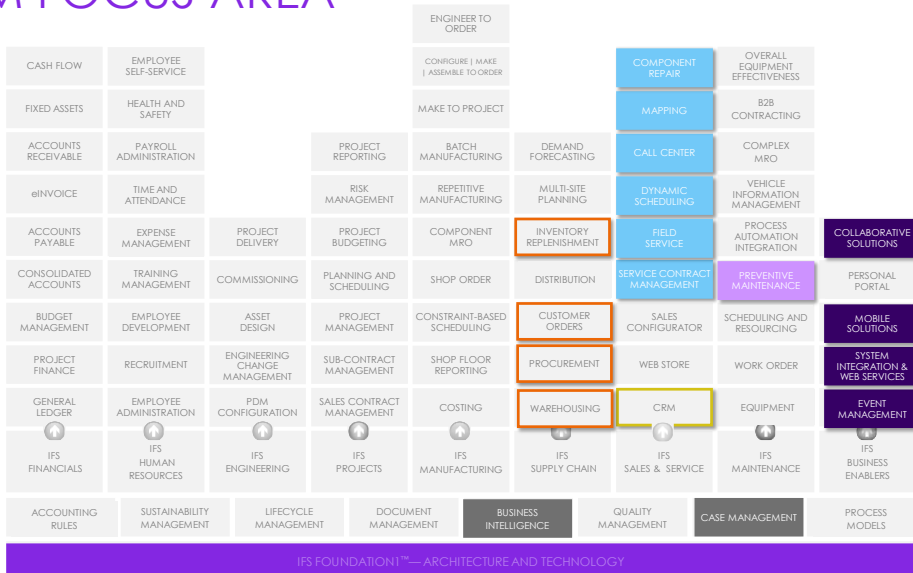
Introducing IFS Field Service Management



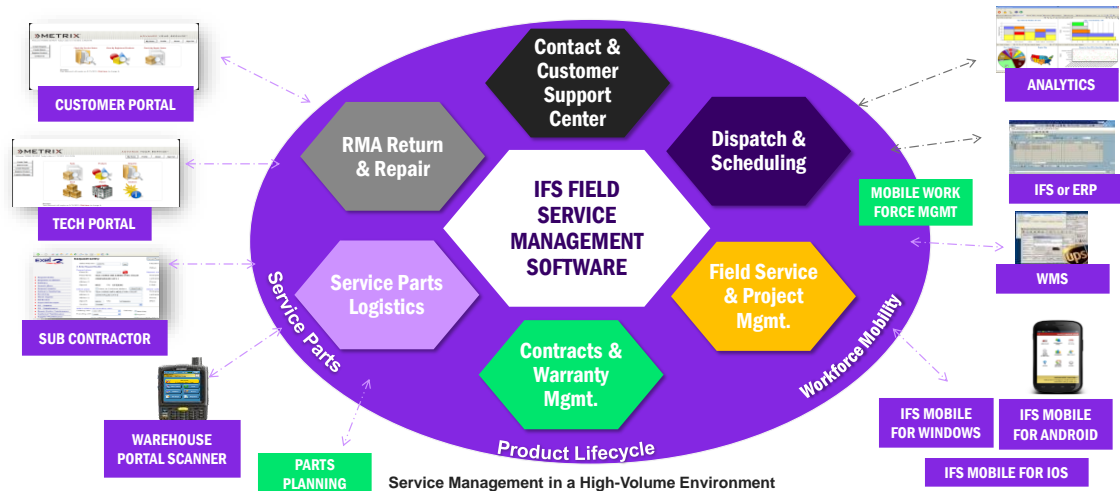
IFS APPLICATIONS™



FSM FOCUS AREA

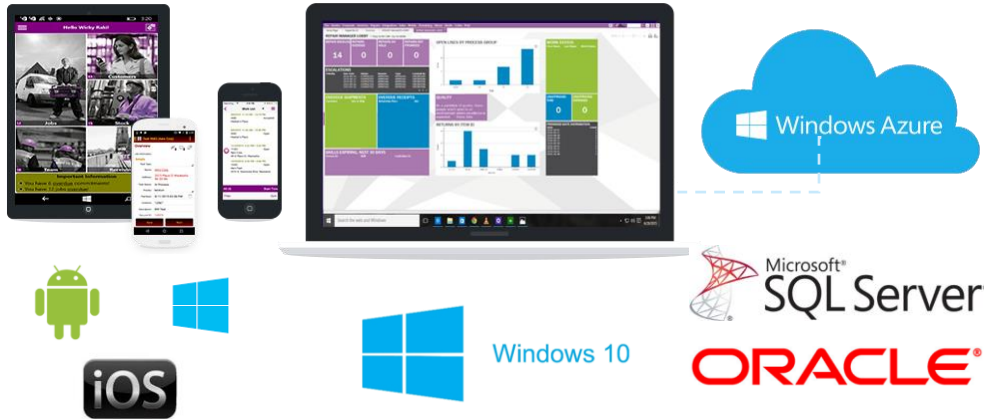


Seamless Service Automation

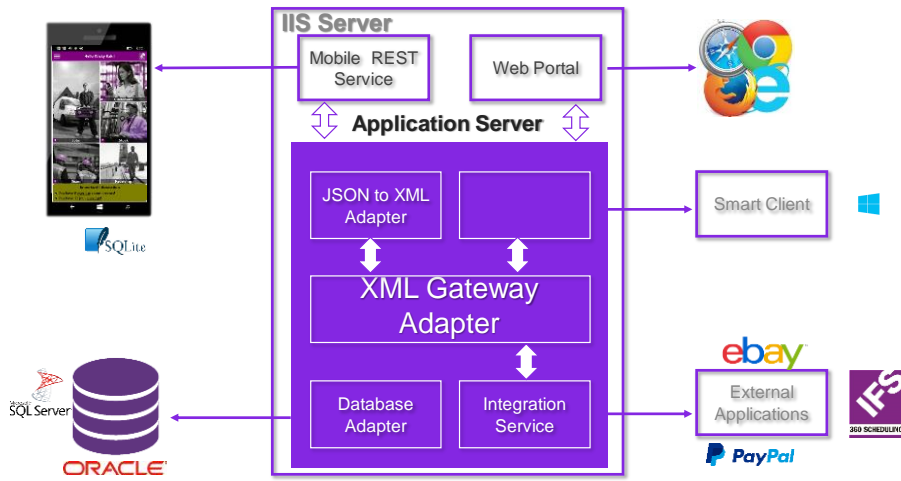


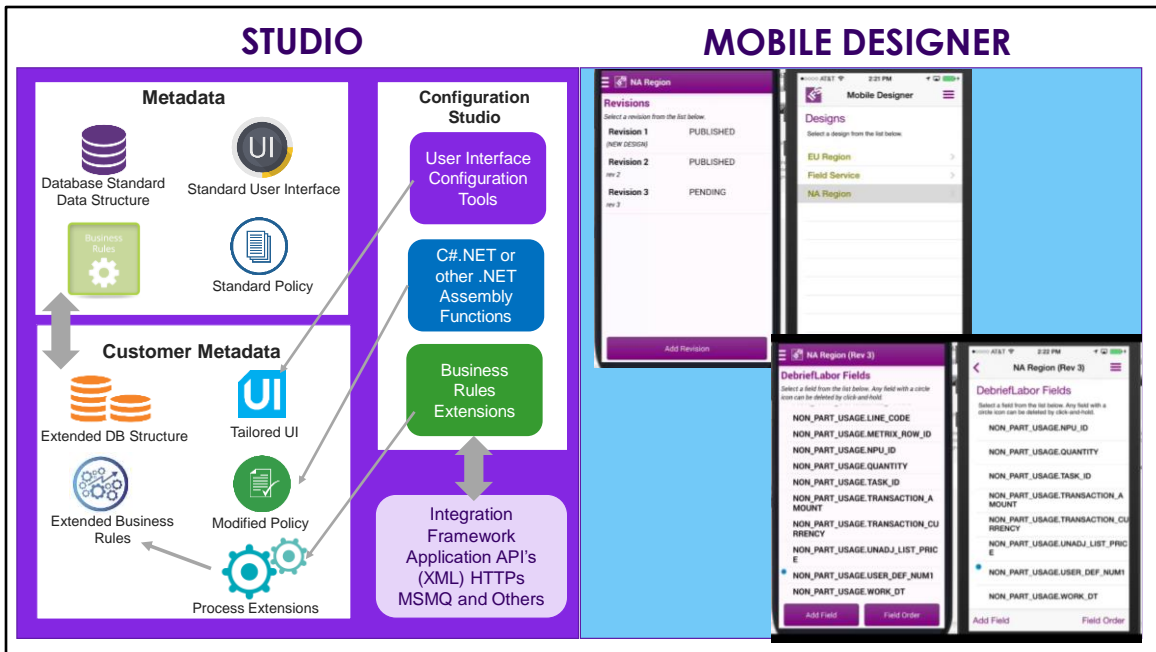
FSM Products

Metrix Service Management



FSM Architecture





Customers



FSM Component Chart



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As a support function for ERP and EAM or as a powerful logistics solution in demanding environments like aerospace and defense.

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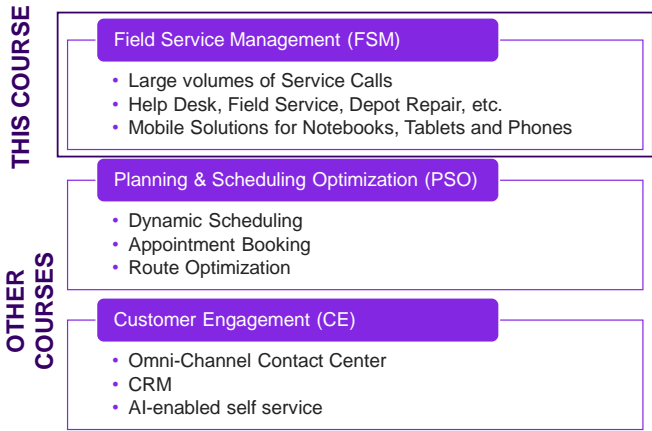
SERVICE MANAGEMENT

A FULL-SERVICE **LIFECYCLE MANAGEMENT** SOLUTION FOR EVERY SERVICE PROVIDER. CONSISTS OF **SERVICE MANAGEMENT** FUNCTIONALITY FROM IFS APPLICATIONS AND HIGHLY SPECIALIZED **BEST-OF-BREED** SOFTWARE FOR **FIELD SERVICE**, **SCHEDULE OPTIMIZATION**, **MOBILE SERVICE**, **REVERSE LOGISTICS** AND MORE.

IFS Service Management is a full-service lifecycle management solution for every service organization. Whether you are providing service in the field, in a plant, at a customer's home or office, in a depot environment, on linear or other capital assets, or anywhere else, IFS Service Management has a solution for you. This is also available regardless of whether you are delivering service through booking appointments, against demanding service level agreements (SLAs), adhering to maintenance contracts, with businesses or directly with consumers.

Introduction To IFS

Field Service Management Solutions



IFS Field Service Management is a best-of-breed software solution for service businesses that manage large volumes of service calls each day. It focuses on the management of work orders, contracts, warranties, parts, and the scheduling of mobile resources. It also includes comprehensive reverse logistics and depot repair for those assets that aren't maintained in the field. It all adds up to an increasingly efficient field service business.

IFS Planning & Scheduling Optimization is a world-class solution that takes planning, scheduling and routing to the next level by introducing optimization, which transforms service delivery by increasing productivity and customer satisfaction while reducing operating costs.

IFS Customer Engagement™ (CE) solutions enable businesses to deliver a faster, smarter service whatever the contact channel. By combining an omni-channel contact center with CRM in a single, uniquely configurable, AI-powered agent desktop, support staff are empowered to deliver rapid service however complex the request. Bringing together disparate sources of customer data from multiple systems, alongside all contact channels, your agents can deliver customer engagement seamlessly, while simultaneously banking productivity gains.



Lesson objectives:

- Basic knowledge of IFS company statistics
- An understanding of the solutions provided by IFS
- An understanding of the IFS Enterprise Service Management solutions

2. Introduction To FSM



Introduction To FSM

Learning Outcomes



By the end of this lesson, you should have:

- An understanding of which types of organizations might use the FSM solution and what their business challenges are
- Had a short introduction to the FSM solution
- An understanding of FSM key features and components
- Had a brief introduction to system architecture
- A basic understanding of core process flows



Activity

Field Service Organizations

1 minute: how many different types of field service organizations can you think of?



Aim of this short activity is for delegates to appreciate the wide variety of business that may have a field service operation

Give the participants a minute to call out the different types of field service organisations they can think of:

- Utilities – Water & Energy
- Infrastructure – engineering services
- Telecoms & Media – networks, broadband, TV services
- Manufacturing – equipment servicing
- Home services – boilers, heating engineers
- Facilities – heating, ventilation and air conditioning, landscaping
- Healthcare – home visits, carers
- Environmental services – waste, recycling
- Housing – maintenance
- Insurance – loss adjusters

Introduction To FSM

Typical Features Of A Field Service Business



Features of a field service business that make their system requirements complex:

- **Complex Work Requirements** - have to balance both predictable (maintenance) and reactive (break-fix) work, with differing priorities
- **Customer-focused** – most of the work done is to satisfy some level of customer expectation, SLA etc
- **Remote, mobile working** – means that a large part of the workforce work independently and are 'separate' to the main organisation, can have technical challenges around connectivity etc
- **Operational Focus** – activity tends to be focused on getting a job done, fixing/avoiding a breakdown – can make it difficult to implement new systems and make changes
- **Parts/Spares Requirements** – completion of work needs to be matched up with the purchasing and logistics of parts

Introduction To FSM

Overview

Field Service Management (FSM) is a best-of-breed software solution for service businesses that manage large volumes of service calls each day.



IFS Field Service Management can help your product-based business greatly enhance its service business through industry leading field service management solutions and expertise. At its core, FSM is based on database records and business rules. When a change is made to a field on a database record, such as a service request, business rules are evaluated to determine whether an action will occur. These actions include updating related database records, logging events, and sending notifications. Business rules help you determine the actions that occur when a change is made. To support your business functions, you set up records, code definitions, and business rules. FSM can be accessed using either a Smart Client, a portal or a mobile client. Your system administrator supplies you with the appropriate access information once FSM is installed at your organization



Create work orders from cases



Manage and monitor technicians



Scheduling and order management



Vehicle/technician location tracking



Job status updates



Route optimization and GPS navigation



Time tracking and driver logs



Knowledge and asset repositories



Parts and inventory management



Integrated invoicing/payment processing



Customer portals

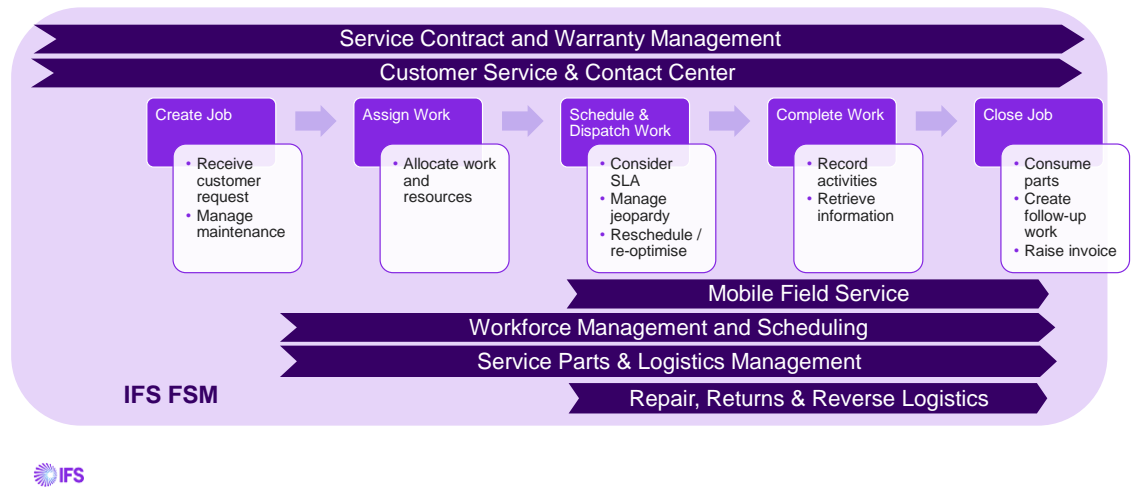


Regulatory compliance measures



Introduction To FSM

Field Service Management Processes



IFS Field Service Management supports the core Service Management processes:

- Service Contract & Warranty Management
- Customer Service & Contact Center
- Mobile Field Service
- Workforce Management & Scheduling

Service Parts Management

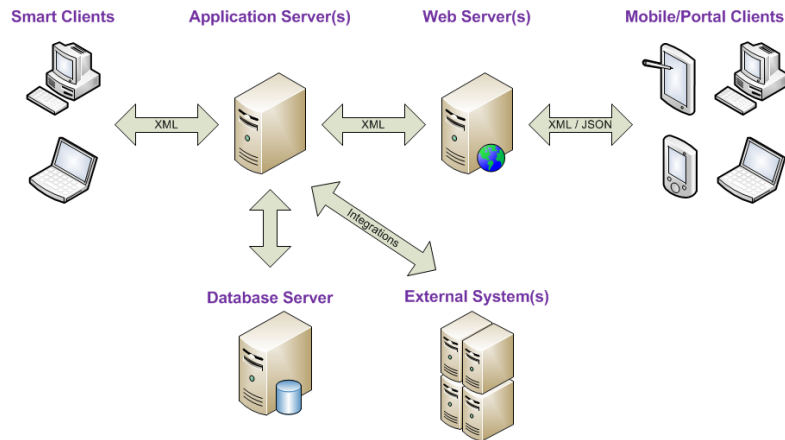
- Repair, Return & Reverse Logistics

The product investments made in IFS Field Service Management are geared to enable organizations to expand and pursue commercial opportunities across all areas of the service value chain.

By focusing our skilled and experienced resources entirely on automating and optimizing service processes, we are able to develop leading-edge features before they become mission critical, enabling our customers to introduce new solutions and value-add services when they are ready, without disrupting their business.

Introduction To FSM

FSM Architecture



The FSM software is built on Microsoft .NET technology. This diagram provides a very high-level view of the solution architecture. The system components may be deployed in various configurations, including deployment to the cloud.

A brief description of the FSM system components:

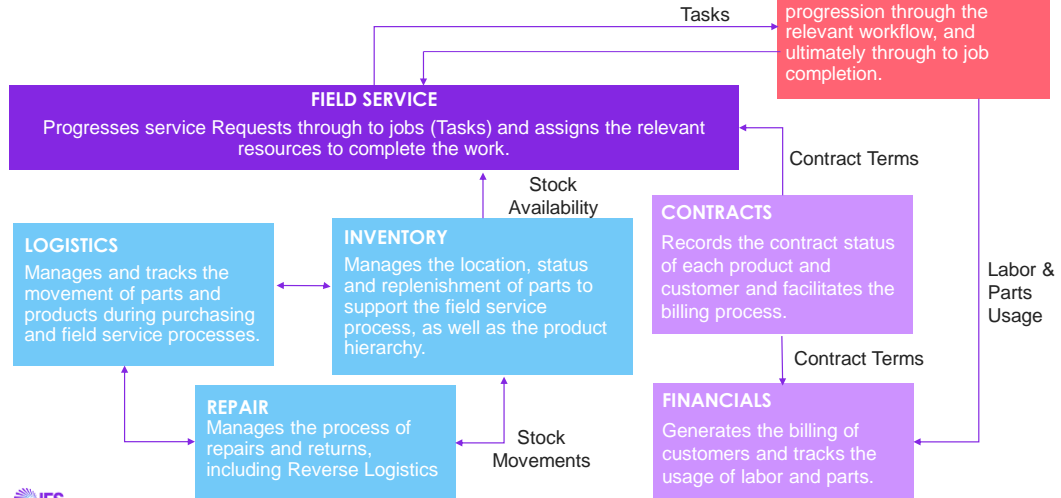
- The FSM Smart Client software is used by network users to perform service operations functions. The Smart Client communicates with the Application Server using XML messages. The vast majority of the FSM Fundamentals Training courses focus on Smart Client users.
- The Application Server holds the business policy logic. Almost all the hard work is done on the server. Multiple servers can be used for scalability.
- The Database Server simply stores data. The software code is on the Application Server. FSM can use either an Oracle or SQL Server database.
- Web Servers can be used to expose the power of the application server functionality to the internet for Mobile or Portal clients.
- Mobile clients allow users to operate in a disconnected state and synchronize their activities when they regain connectivity with the web server. There are client applications for Android, iOS and Windows platforms.
- Portal clients allow customers, third party providers, and other remote users

access to the system with a web browser and credentials.

- External Systems (e.g. ERP, CRM, WMS, etc.) can be interfaced using the FSM Connect via multiple communication protocols.

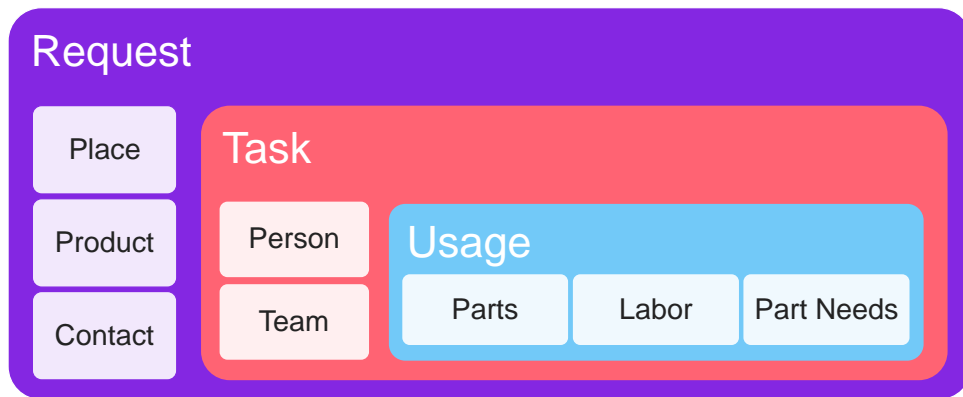
Introduction To FSM

Key FSM Modules



Introduction To FSM

Request Relationships



A Request, the heart and soul of FSM, is related to many other records that are created or linked to the Request throughout the service process. Service requests are used to record the following information during the call-taking process: the place where service is required, the products that require service, Contact information, information that describes the problem, and information that classifies the request, such as the request type and priority. Requests are also created by automated processes, for example preventative maintenance and engineering change orders. They can also be created from integrations with equipment that can send diagnostic information. After a service request is created, tasks are created and the tasks are scheduled and assigned.

The FSM Core Concepts and FSM Core Processes courses will expand on these relationships.

Introduction To FSM

Logging Into FSM

Application



- Access to full system, including admin functions
- Configuration & business rules
- Single Sign-On option

Web Client



- End-user access to relevant functionality
- Mobile access



Log on to FSM can be done via the application or a web client; configuration and admin options are only available via the server-based application

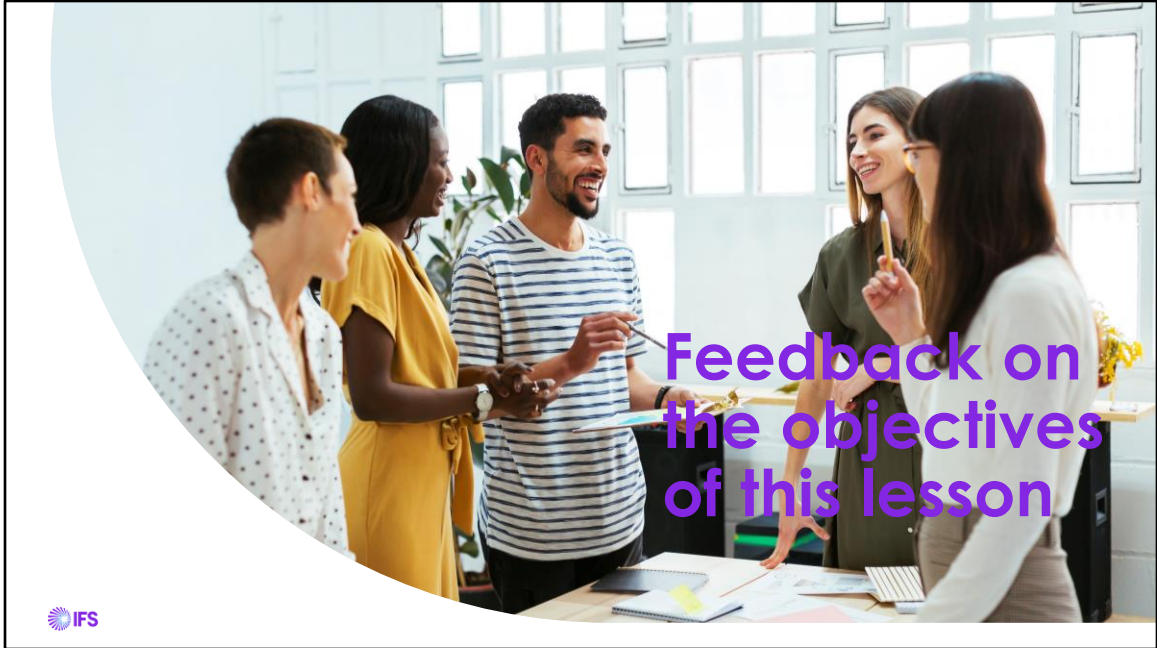
Single Sign on can be configured



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.



Lesson objectives:

An understanding of which types of organisations might use the FSM solution and what their business challenges are

Had a short introduction to the FSM solution

An understanding of FSM key features and components

Had a brief introduction to system architecture

A basic understanding of core process flows

3. User Interface Overview



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 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 Username and password and click Login

A screenshot of the IFS Field Service Management login window. It features the IFS logo at the top. Below the logo are three radio buttons: 'Use FSM Authentication' (selected), 'Use Windows Authentication', and 'Change Password'. There are input fields for 'Person ID' and 'Password'. A 'Server' dropdown menu is set to 'SystemTest' with an information icon. At the bottom are 'Login' and 'Close' buttons.

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

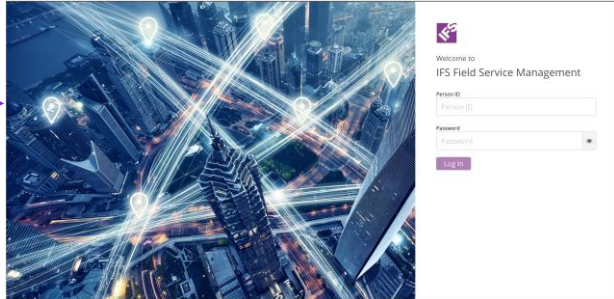
User Interface Overview

Start 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 Username and password and click Login



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Layout

Learning Outcomes



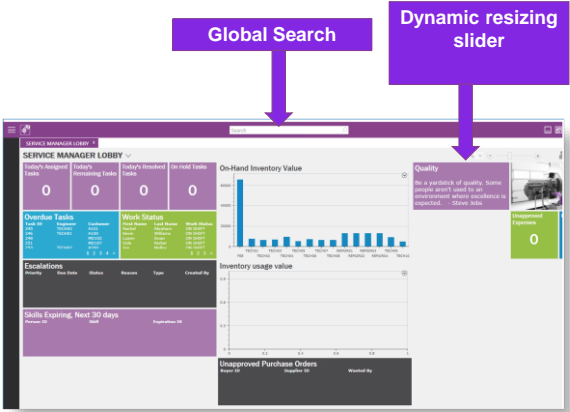
By the end of this lesson, you should have:

- 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

- 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




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.

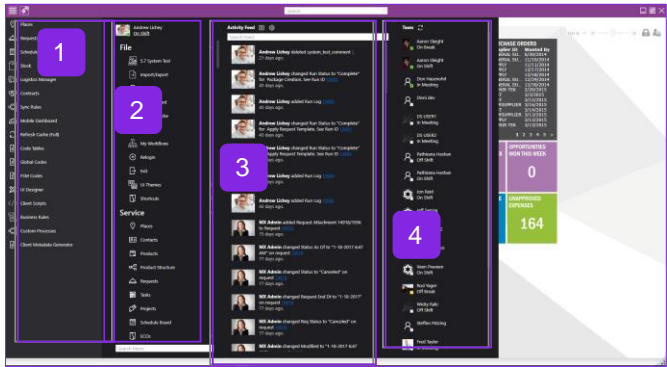
The lobby can be resized using the slider
At the top center of the screen

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.

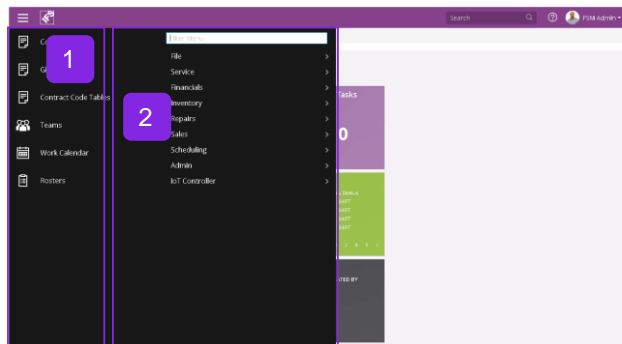
Layout

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- FSM system menu is launched via the standard  button
- The menu is divided into 4 main areas

1 Shortcut Bar

2 Global Smart Menu



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.

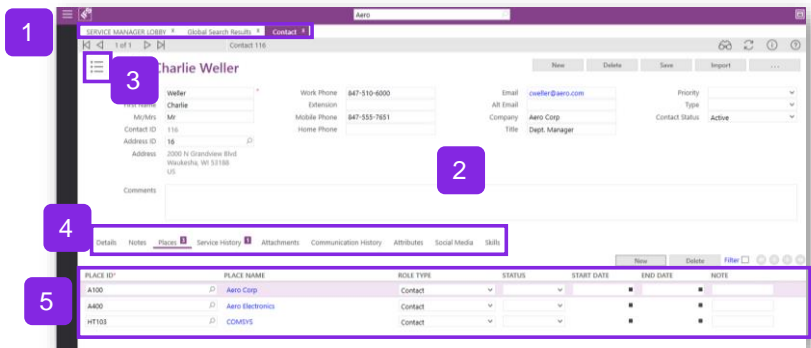
As a customer service representative, I want to know when someone else makes a change to the records of one of my key customers so that I can immediately follow-up on it. The activity feed feature will not only record and share changes about a record, it will also share any changes to child records. 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



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 NameWeller

First NameCharlie

Mr

Contact ID116

Address ID16

Address2000 N Grandview Blvd
Waukesha, WI 53188
US

Comments

Details

Notes

Places

Service History

Attachments

PLACE ID*

A100

A400

HT103

PLACE NAME

Aero Corp

Aero Electronics

COMSYS

Last NameWeller

First NameCharlie

Mr/Mrs

Contact ID116

Address ID16

Address2000 N Grandview Blvd
Waukesha, WI 53188
US

Comments

PSM2 - Address Lookup

Clear

Search

Close

Address ID16

Address

City

State

Zip

Place ID

ADDRESS ID

NAME

STREET

CITY

STATE

ZIP

COUNTRY

16

Aero Medical HQ

2000 N Grandview Blvd

Waukesha

WI

53188

US

Cancel

New

OK



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 ×

⏪ ⏩ ⏴ ⏵

FUNCTION

[Contract PM Request Generation](#)

[Contract Renewal](#)

[Contract Copy](#)



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

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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.

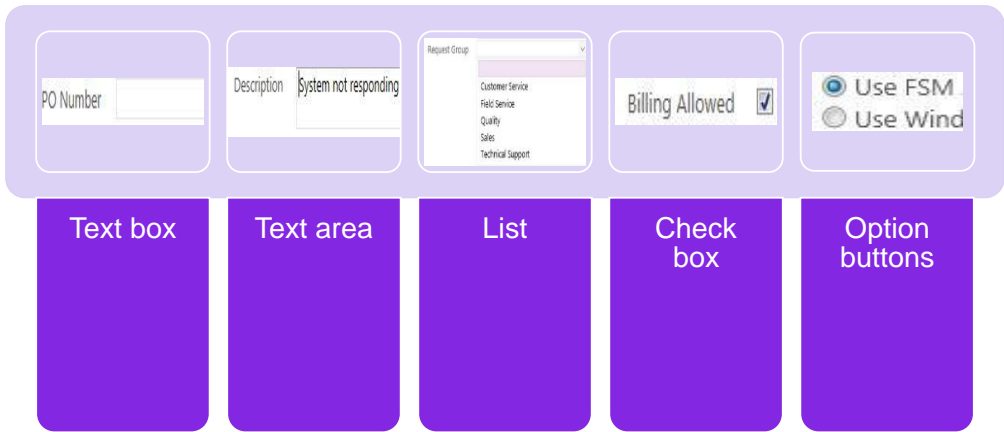
Examples: Place ID on REQUEST, Calendar on PERSON, Product Family/Product Name on PRODUCT.

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

Field Types



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

The first screenshot shows an 'Address ID' field with the value '16' and a red asterisk at the end, indicating it is a required field. Below it, the 'Address' field contains the text '2000 N Grandview Blvd', 'Waukesha, WI 53188', and 'US' on separate lines.

The second screenshot shows a 'Last Name' field with the value 'Weller' and a red asterisk at the end, indicating it is a required field. Below it, the 'First Name' field contains the text 'Charlie'.

The third screenshot shows a form with several fields. The 'Latitude' field contains the value '43.037732' and has a red asterisk at the end, indicating it is a required field. The 'Longitude' field contains the value '-88.177274'. The 'Blanket PO' field has the value 'UPPER CASE'.



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.



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.

Practice & Learn

Layout

- Log into FSM
- Use the Global Smart Menu to go to Service, Requests
- On the request screen find the following types of fields:
 - List
 - Required
 - Read Only
 - Checkbox
 - Field with a Lookup icon
- Find a standard screen and non-standard screens. Note the differences.





Navigation

Learning Outcomes



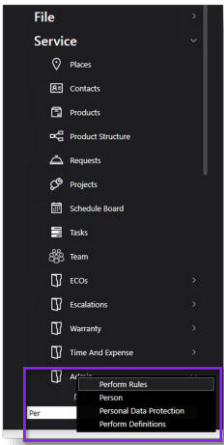
By the end of this lesson, you should have:

- 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.

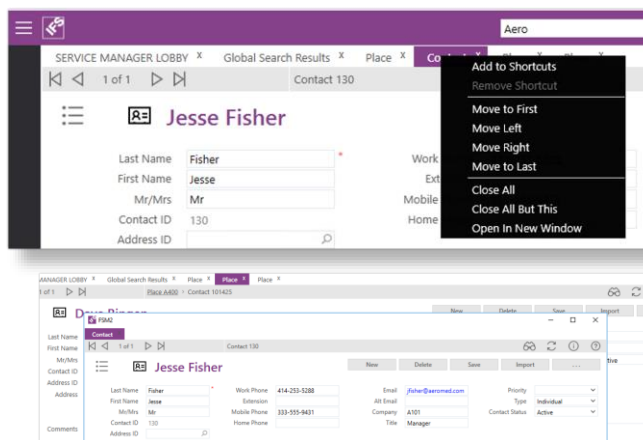
Screens may also be opened by using the Quick Screen Jump at the bottom of the menu.

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 with automatically save any changes a user has made to the current record.

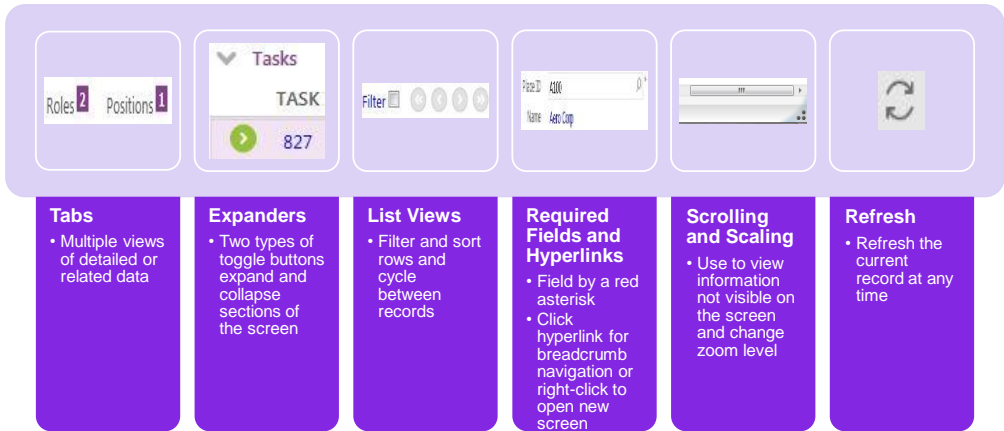
Text Input fields enable you to enter arbitrary text, subject to field length and type restrictions. Most text input fields allow entry of both characters and numerals. In the application, you can use the right mouse click to bring up different menus depending on where you have your pointer. Most fields, 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.

Navigation

Viewing Record Details



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.

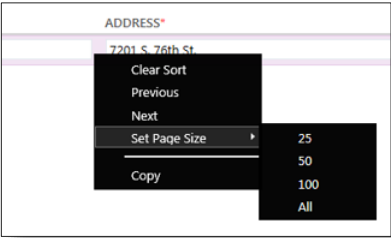
Refresh refreshes the current record at any time. User will be prompted if changes have been made. This may be used to undo any changes made to the record since it

was last saved.

Navigation

Right-click Functions

List Views



Common View



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 Numbering Scheme



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:

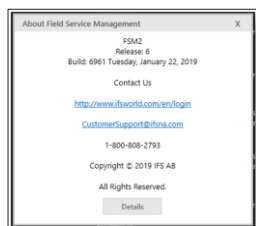
Double-click a **field label** to view table and column descriptions. Note that the system can be configured to provide custom descriptions by using Message Translations.

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

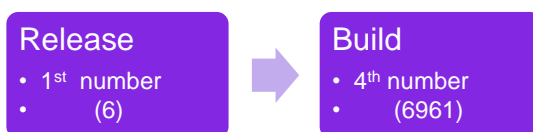
From the Reports screen, run the **"M5 Metadata Report"** for a report to give metadata for the tables.

Help

Product Release Cycles



Release 6.6961



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.



1. Open the Task screen
2. Show Help, View Information for details including screen name and field metadata for the Search Form, Search Result List, and Workspace
3. Show the different options on the Help menu including the About screen with Details
4. Show how to double-click on a field label to bring up field information
5. Press F1 to bring up online documentation
6. Within the documentation, CTRL-F and search

Practice & Learn

Help

- Use the Global Smart Menu to go to Service, Tasks
- Double-click on the label of a field to display field help
- Press F1 to get online help
- Within the Help document, CTRL-F to search
- Go to Help, View Information to see information about the screen
- Go to Help, About and click the Details button to view the data





By the end of this lesson, students should:

- Understood the standard screen layout
- Understood there are non-standard screens
- Recognized the different field types
- Recognized the different field properties
- Understood how to open screens from the menu or menu select text box
- Known there are ways to edit records
- Known there are ways to view record details
- Recognized there are keyboard shortcuts
- Understood the different options from the Help menu
- Known there are additional ways to get field or screen help
- Recognized the IFS FSM version numbering scheme

4. UI Personalization



UI Personalization

Learning Outcomes

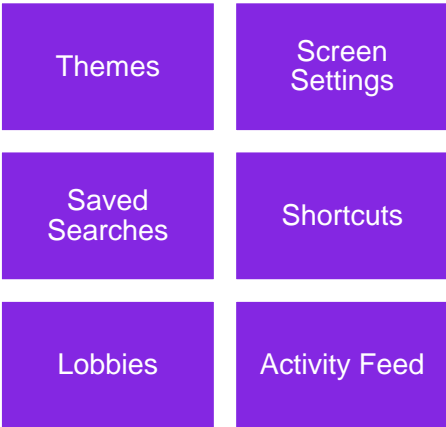


By The End Of This Lesson, You Should Have:

- Understood there are several UI Themes
- Known that the Home page can be personalized
- Understood how individual screens can be personalized

UI Personalization

Overview



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.

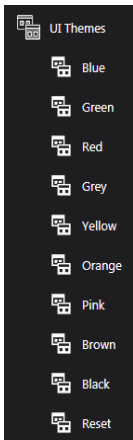
Shortcuts allows the user to quickly access frequently used screens and data.

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

Available Themes



Color Changes

- Banner
- Screen Titles
- Colored Expanders

No Changes

- Tabs
- Tab Counts
- Hyperlinks

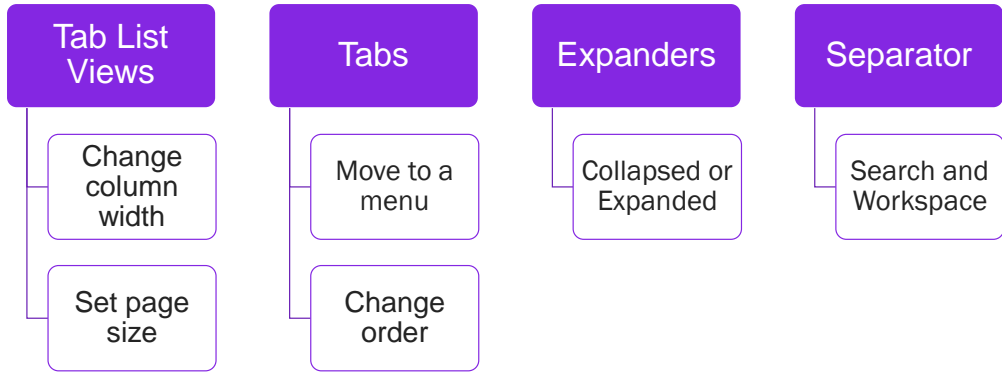


Individual users can change their UI Theme if the **allow_user_theme_change** application parameter is set to Y. Changing themes saves automatically, and the default theme can be returned by clicking **Reset** on the UI Themes submenu. Themes are found on File, UI Themes. Note, only the banner at the 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.

UI Personalization

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.

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.

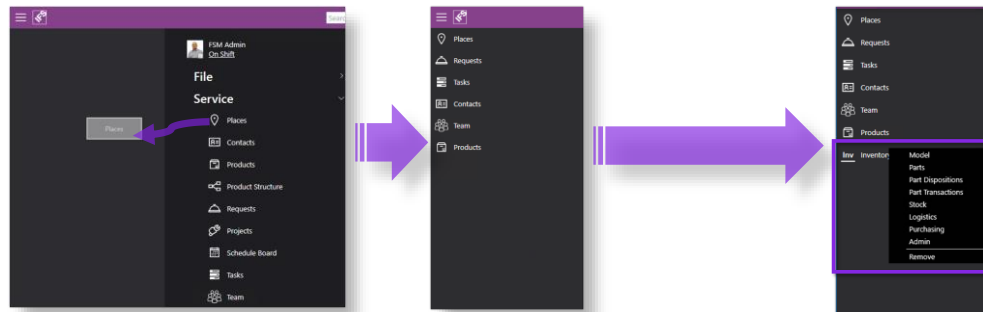
Point to the **Separator** between the Search and Workspace panels, which becomes a crosshair, to drag the column to the desired size.

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 Underlined



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".

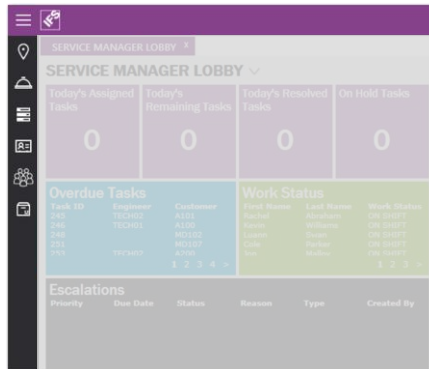
To Remove a tile:

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



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

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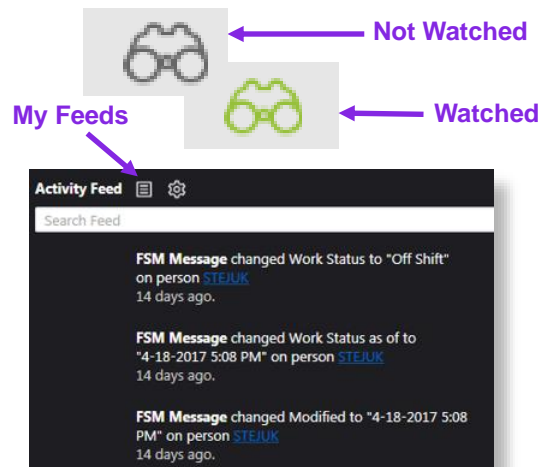
UI Personalization

Activity Feed Overview

Track and monitor changes on a record

Binocular's 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.

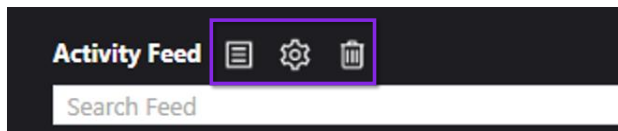
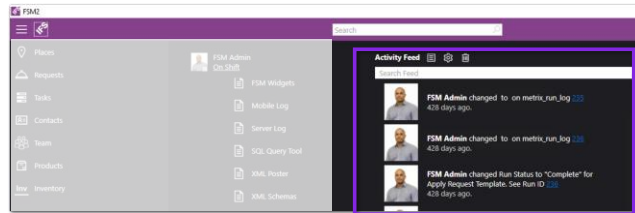
Click on the "My Feeds" icon to see the configured activity feeds.

UI Personalization

Activity Feed Overview

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

-  My Activity Feeds
-  Settings
-  Mark All as Read



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

My Activity Feeds

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

2 These can be filtered using the Search Fields

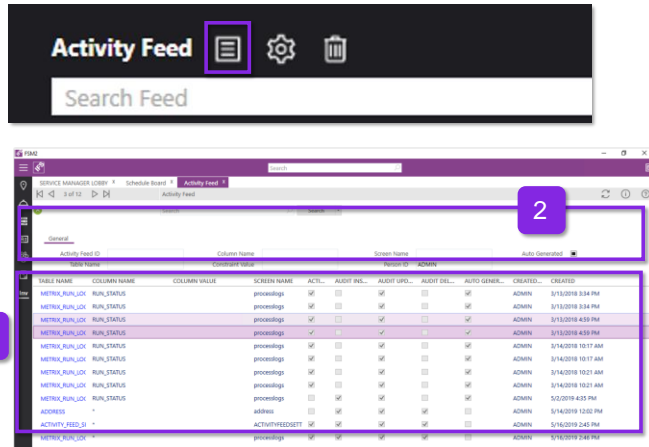


TABLE NAME	COLUMN NAME	COLUMN VALUE	SCREEN NAME	ACTL...	AUDIT INL...	AUDIT UPD...	AUDIT DEL...	AUTO GEN...	CREATED...	CREATED
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/13/2019 3:34 PM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/13/2019 3:34 PM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/13/2019 4:55 PM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/14/2019 10:17 AM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/14/2019 10:17 AM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/14/2019 10:21 AM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/14/2019 10:21 AM
METRAAL_RUNLOCK	RUNSTATUS	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/14/2019 4:55 PM
ADDRESS	-	address	address	SE	SE	SE	SE	SE	ADMIN	3/14/2019 12:02 PM
ACTIVITY_FEED_M	-	ACTIVITYFEEDSETT	ACTIVITYFEEDSETT	SE	SE	SE	SE	SE	ADMIN	3/16/2019 2:42 PM
METRAAL_RUNLOCK	-	processings	processings	SE	SE	SE	SE	SE	ADMIN	3/16/2019 2:42 PM



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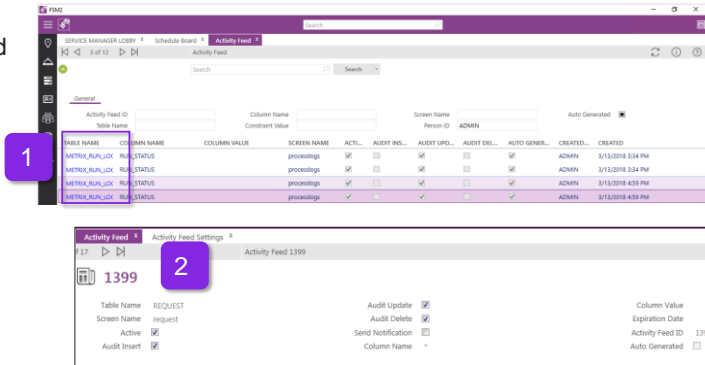
UI Personalization

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

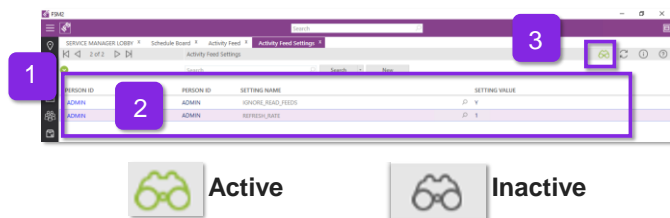
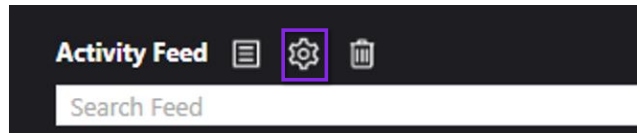
Settings

- 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



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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

PERSON ID	PERSON NAME	SETTING NAME	SETTING VALUE
ADMIN	ADMIN	IGNORE_READ_FEEDS	Y
ADMIN	ADMIN	REFRESH_RATE	1

Activity Feed Settings

Person ID: [dropdown]

Setting Name: [dropdown]
Setting Value: [dropdown]

Setting Name dropdown options:
Number of days to display a Feed
Days before an Auto Generated Feed expires
Maximum Number of parent rows to Follow
Number of minutes before refreshing Feed
Ignore feeds which have been read



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

UI Personalization

Lobbies

Baseline
Lobbies

- 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 Lobbies
Cannot Be
Configured, Only
Personalized!**



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.

Practice & Learn

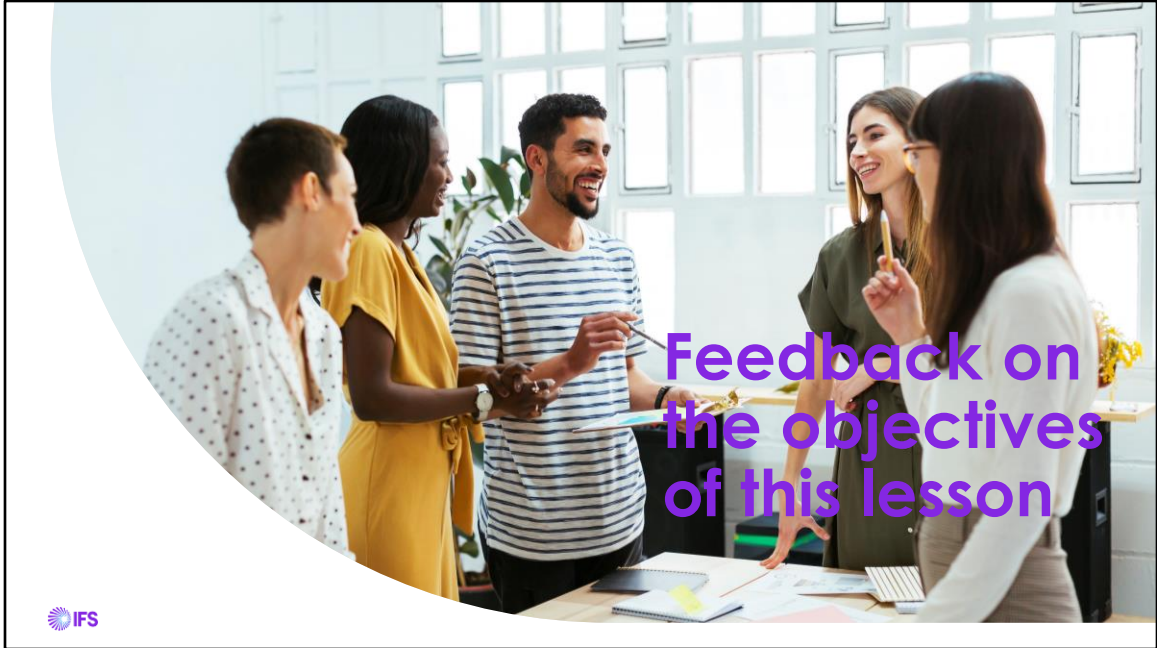
UI Personalization

Go to Service, Tasks

- Change column widths
- Move tabs to the menu and back. Save Screen Settings. Delete the Screen Setting.
- Add screens and menus to the Shortcut menu
- Add Task description to the Activity Feed and modify the description of the record

Personalize the Service Manager Lobby.





Lesson objectives:

- Understand there are several UI Themes
- Know that the Home page can be personalized
- Understand how individual screens can be personalized

5. Search



Search

Learning Outcomes



By The End Of This Lesson, You Should Have:

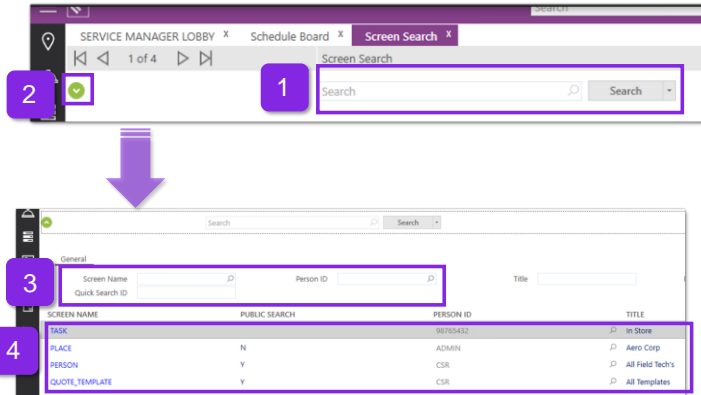
- Knowledge of the functions on the Search Panel
- An understanding of functions on the Search Results
- Searched for records from the Search Panel

Search

Search And Results Panel

- The Search screen is at the top of the screen

- 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



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

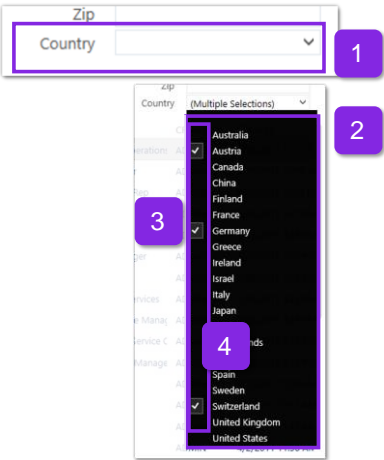
- For Fields with multiple allowed values
- Multiple Values can be selected in the search at once

1 E.g., Drop downs

2 Hold Shift

3 Select Values

4 Search will run for checked values



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.

Search

Global Search

- 1 Global Search
- Searches all records in the system
- 2 Returns all matching results
- Listed by Entity

Global Search Results

Results for 'Franklin'

Place ID	WHOSE PLACE	CATEGORY	PLACE NAME	PLACE STATUS
PHS-F	Retail store	New Market	Pickaway Franklin	Active

PERSON ID	FIRST NAME	LAST NAME	JOB TITLE	WORK PLACE	PERSON GROUP
MODRVER	Thomson	Franklin		683	JD

ADDRESS ID	NAME	ADDRESS	CITY
21	Highmark HQ	6537 S. 27th St	Franklin
562	Bell 470	5525 W. Ransom Ave	Franklin
587	Hickway	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.

Practice & Learn

Search

- On the Request screen, retrieve all Requests from the start of this year to today's date
- Retrieve all Requests for Place Names that begin with "A" or "V"
- Retrieve all Requests with High and Medium Priority
- Use the Global Search to search for records in the application

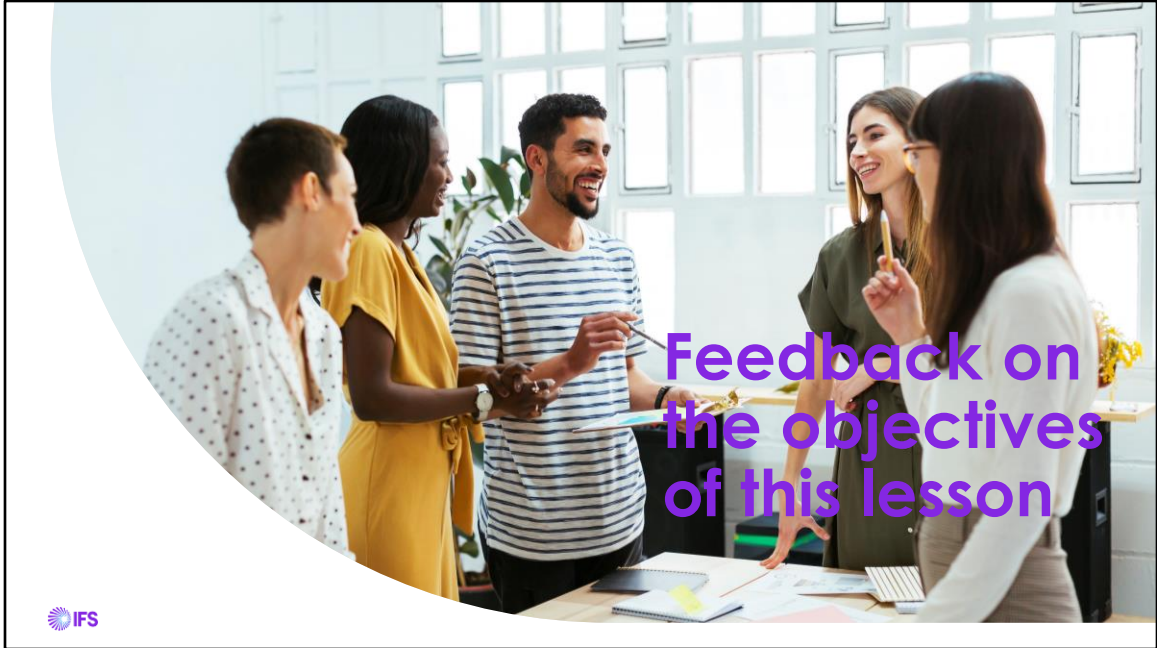


Additional searches

'TODAY'

>1/1/2017

"A%" and "V%"



Lesson objectives:

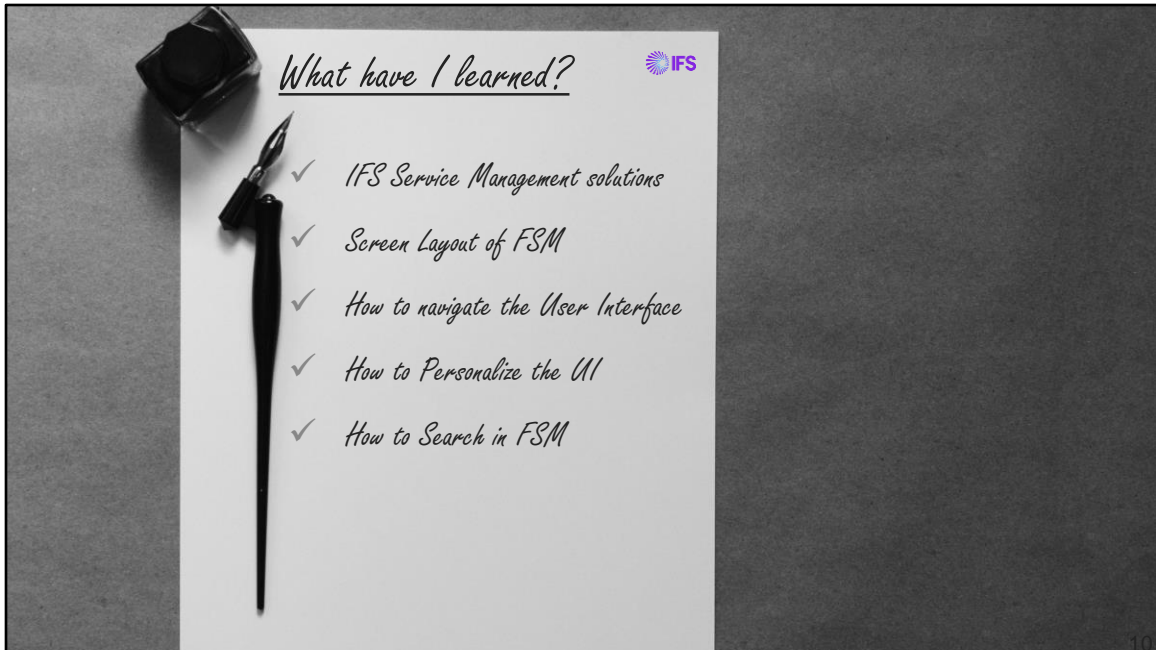
Knowledge of the functions on the Search Panel

An understanding of functions on the Search Results

Searched for records from the Search Panel

Wrap-up





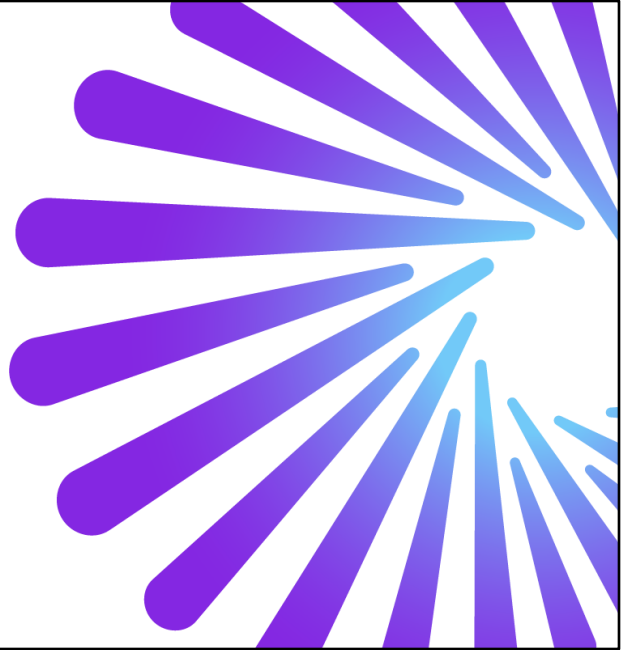




**Please Provide
Us Feedback?**

Thank you!

#MOMENTOFSERVICE





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