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IFS FSM CORE ENTITIES

IFS ESSENTIALS COURSE – IFS FSM™ 6.0

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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

SETUP FOR
PERSON ENTITY

03

SETUP FOR
PLACE ENTITY

04

WRAP UP

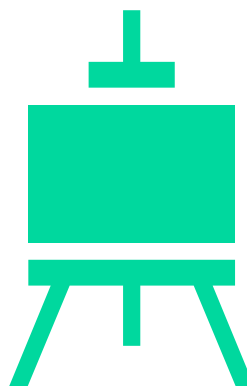


OUR TRAINING APPROACH

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

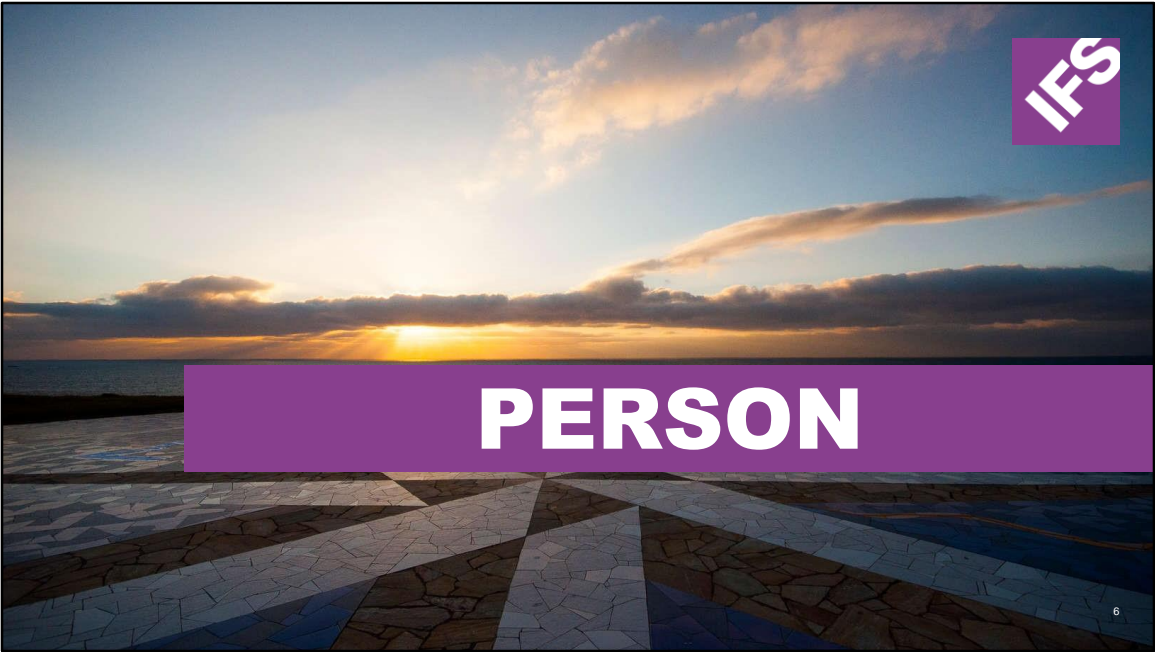
Field service is quite a distinctive business area and if you understand a bit about that context, it will really help you to appreciate what IFS customers are looking for when they implement this solution

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



CORE ENTITIES: PERSON

LEARNING OUTCOMES

By the end of this lesson, you should:

- Able to complete the setup requirements for Core Entity Person
- Understand the Person record and able to describe the usage and purpose.
- Understand the relationship with Place on the Person record
- Understand Roles & contacts



CORE ENTITIES: PERSON

PERSON RECORD ELEMENTS

The **Person** record includes various types of information related to the employees

IDENTITY & LICENCE

Status of the User
Licence Type of the User

PERSONAL INFORMATION

Name & Address
Contact Details
Job Title
Language
Currency

RELATIONSHIPS

Mobile User flag
Portal Access flag
Roster

SECURITY & PERMISSIONS

- Roles
- Access Groups
- Approval settings

TIP: Always set Leavers as Inactive rather than deleting their Person record, otherwise you will lose their work history. Person records should only be deleted if created in error

TIP: If you use Multi-Currency, the 'Currency' field defaults to the currency identified here when he/she creates records

TIP: Calendar Exceptions for the individual can be recorded here for vacation, training etc

IFS

The Places tab defines how the person is related to the specified place.

Works from place is used to identify default places for a person. This is important in Repair Center for the receiver and the shipper as well as the person who creates the RMA.

Starts work from is used to identify the place where the person begins work; used when calculating and optimizing routes for scheduling.

Place for stock is used for the default location of stock for field service representatives or repair personnel. This is also used with the Mobile user to determine where they get their stock from. Mobile must also indicate the location.

Default place for portal access is used to define the place (e.g., customer or internal place) whose information the person can access. This is for any portal and is used in conjunction with the FSM License Type. In our example, if this was a person to access the Customer Portal, the person could access and create requests for Place ID "A100".

Place for portal access is used to define any other place (e.g., customer or internal place) whose information the person can access. This is for any portal and is used in conjunction with the FSM License Type. In our example, if this was a person to access the Customer Portal, the person could also access and create requests for Place ID "A400".

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CORE ENTITIES: PERSON

PERSON-PLACE RELATIONSHIPS

The **Place** tab within the **Person** record defines how the person relates to the specified place for different business purposes. The most commonly used relationships are:

Person-Place Relationship	Description
Work From Place	Identifies default places; particularly important in Repair Center
Starts Work From / Ends Work At	Where the person begin/finishes work; used in calculating and optimizing routes for scheduling
Place For Stock	Where the field technician collects their stock
(Default) Place For Portal Access	Defines the place whose information that the user can access

Details

Security

Places

Addresses

Skills

Calendar Exception

Roles

Positions

Notes

Events

Attachments

Printers

New

Delete

Relationship	Place	Location
Ends Work At	MX CORP	
Starts Work From	MX CORP	
Place For Stock	TRUCK01	GOOD
Works From Place	TRUCK01	

10 Showing 1 - 4 of 4 records

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CORE ENTITIES: PERSON

SECURITY TAB

The **Security** tab within the **Person** record defines how and what the person can access information within FSM

Security Feature	Description
Password	Controls the user's password, which can be reset by an Administrator
Physical / Organizational Hierarchy	Used to group employees, primarily for Mobile and Scheduling
Single Sign On	Enables Windows authentication

The screenshot shows the 'Security' tab in the IFS FSM application. It includes fields for Password (Last Changed: 23/5/2017, Password Expires: 24/11/2023, User Name: ENG01, Labor Rate Code: LRate1, Labor Multiplier: 1.000), Roles (Failed Attempts: 0, Logged On: 8/12/2017 18:00, Last Logged In: 8/12/2017 18:02, Last Logged Out: [blank], Access Group: [blank]), SSO (SSO Enabled: [checkbox], SSO User ID: [blank], Modified: 15/5/2019 07:10, Modified By: ADMIN), Physical Hierarchy (Physical Service Group A: CORP, Physical Service Group B: [blank], Physical Service Group C: [blank], Physical Service Group D: [blank], Physical Service Group E: [blank]), and Organizational Hierarchy (Org Service Group A: [blank], Org Service Group B: [blank], Org Service Group C: [blank], Org Service Group D: [blank], Org Service Group E: [blank]).

TIP: To enable SSO, you must set the SSO Enabled option and add your SSO User ID and SSO Domain.

Of all the tabs on the Person record, the Security tab carries the most weight. Here the **password** resides. If the user has failed to log in after a certain number attempts, the Administrator can unlock the person record by the “Unlock” button on the Person record.

The **hierarchical groups**, Physical Service Groups and Organizational Service Groups, are used to group employees and are used with Mobile and Scheduling though can be used with other functionality. For example, what is my geographic location (Physical Service Group) in relationship to my organization, i.e., Northeast, Midwest, Asia-Pacific. And what is my organizational role (Organizational Service Groups) in relationship to my organization, i.e., Service, Tech Support, Warehouse.

Images of the person, which can be added to the record, are taken from the Studio Image Library. How to add images to the Image Library will be discussed in the *IFS FSM Application Configuration* course. You can choose to enable **single sign on (SSO)** using Windows authentication; once a person is authenticated that person can log in to FSM with no additional authentication required. FSM supports LDAP and Active Directory Windows authentication when using single sign on. To enable SSO, you must set the SSO Enabled option and add your SSO User ID and SSO Domain.

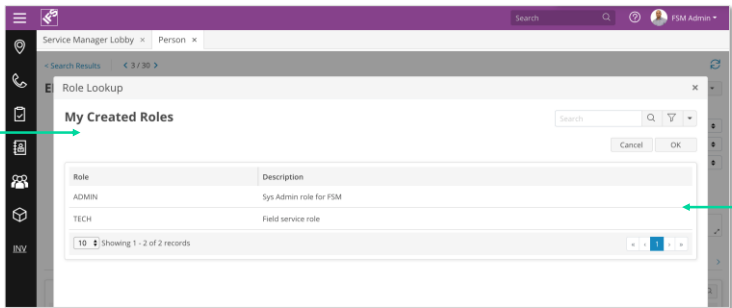
CORE ENTITIES: PERSON

ROLES TAB

The **Roles** tab within the **Person** record defines what a person can or cannot access within FSM.

Roles control screens, menus, functions, reports and other features; they are the permissions that allow users to see and access information and screens.

TIP: If you want to prevent a Person viewing a menu or screen you must explicitly deny access

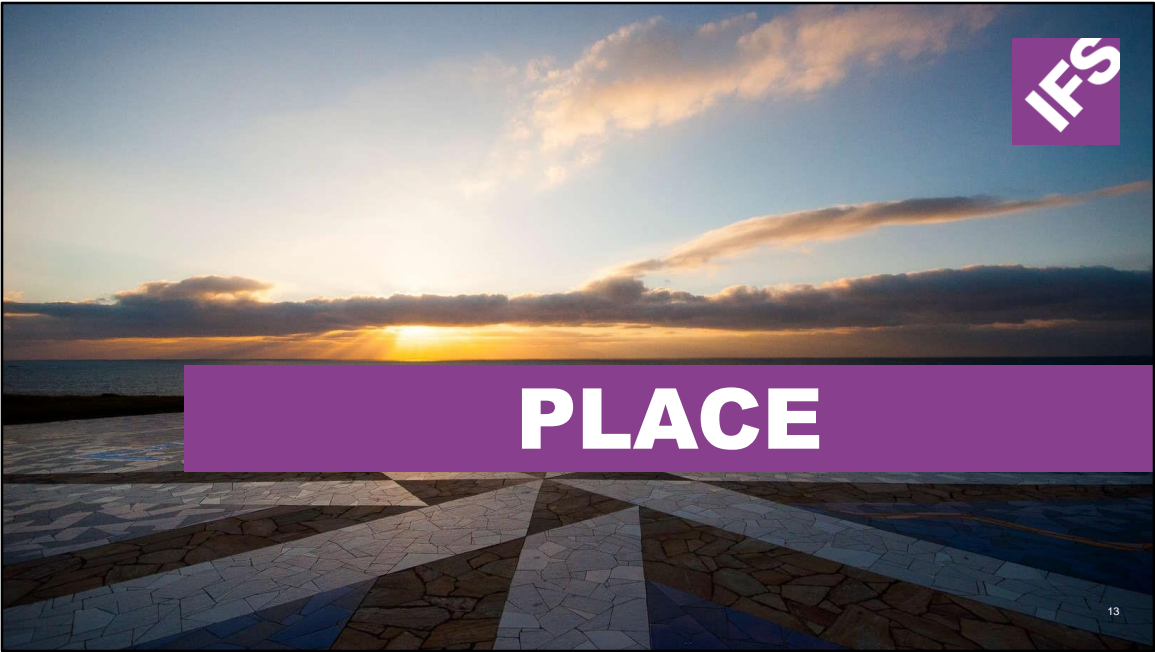


TIP: A Person can have multiple Roles

Roles are used to identify the menus, screens and functions that a person cannot access in FSM. Another way of looking at Roles would be by thinking in terms of security. How much is a person allowed to do within the company? Role records are generally identified using codes and description that describe a specific job function.

One or more Role records can be associated with a person record. You can have the most permissive combination applied. Or, use the “Incremental” option on the role without combining the roles will allow restrictions from the first role except for items you specifically enable/disable from the second role.

If you do not want a menu or screen visible to a person, you must explicitly deny access. By default, all menus and screens of the application are accessible.



CORE ENTITIES: PLACE

LEARNING OUTCOMES

By the end of this lesson, you should:

- Understand the Place record
- Understand child relationships on the Place record
- Understand the most significant fields



CORE ENTITIES: PLACE

PLACE RECORD ELEMENTS

The **Place** record includes various types of information related to any physical or virtual location relevant to the field operation, eg Customer Site, Warehouse, Work Site. **Place** records are typically used to identify where products, parts, inventory, persons, suppliers or contacts are located.

TIP: Place information can be populated with Place Defaults to pre-fill new Place records with pre-defined values

The main elements of the **Place** record are:

GENERAL
Name & Address
Contact Details
Time Zone
Whose Place

FINANCIALS
Currency
Credit Terms
Price Baseline Data
Tax Information

LOGISTICS
Allow Part Stock
Track Part Need
Carrier Information

SERVICE GROUPS

- Physical
- Organizational
- Sales

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Places are related to other places for bill to relationships and stock replenishment for example.

Whose Place determines whether the place belongs to your organization or to another organization such as a customer, supplier, third-party repair, and so forth.

Used during the repair process to affect the process where the place to repair is not the place to receive—a place that is not ours is a third-party repair center and a purchase order is created to ship the unit instead of creating a transfer part need.

Allow Products determines whether products are found at this place. Products are generally not found at a billing place, for example.

Billing Place determines whether billing is sent to this place. Billing is not sent to a warehouse, for example. If you attempt to bill a place that is not a billing place, vouchers cannot be posted to invoices and the vouchers are listed with an error status.

Calendar ID determines the hours that the place is open and is used for work assignment

Stock Parts is used to determine whether parts can be stocked at the location.

Global Name is a way to group places together with whom you have a “national,” “regional” or “organizational” relationship.

Places and locations must be set up for shipping, receiving, the place for stock, part dispositions, customer places, and optionally third-party repair.

To store stock, locations and bins must be created on the place record before stock locations and bins can be created. There are two places to setup bins and locations for places. Either on the **place** record itself or through the **Inventory, Admin menu**.

There are several fields on Location that are significant.

Ours indicates who owns the PLACE.

The "Ours" option on the Location indicates whether this LOCATION is owned by your organization.

Usable identifies whether items stored in this bin are always usable, always unusable, usually usable, or usually unusable. This value affects whether certain stock can be received in this bin. Use this option with care otherwise you will not be able to move items to the location you want to use.

Bin Control indicates whether bins are allowed at this location.

CORE ENTITIES: PLACE

IMPORTANT FIELDS

Place Field	Description
Whose Place (Main Tab)	Identifies who the place belongs to, eg Own Organization, Customer, Supplier etc. Used during repairs to determine where the repair should take place if not the same place as receipt.
Allow Products (General Tab)	Identifies whether Products stored at this Place
Billing Place (Financials Tab)	Identifies Place for sending bills
Calendar ID (General Tab)	Sets the hours that the place is open and used for work
Global Name (Main Tab)	Way to group Places that are related to each other, eg those with a regional / national relationship
Location Tab	Controls locations and bins, used to identify where parts and stock should be stored.



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CORE ENTITIES: PLACE

PLACE-PERSON AND PLACE-PLACE RELATIONSHIPS

The **Person** tab within the **Place** record defines how the person relates to the specified place for different business purposes.

TIP: Business rules can be used to assign related Persons and Places

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On the Place record, the Person tab defines how the person is related to the specified place. Likewise, the Place tab defines how this place is related to the specified place.

The **Person** tab includes associated persons, such as sales representatives or field service representatives. The global code, **person_relationship**, is significant to this tab. Business rules can be used to assign, for example, a primary and secondary technician associated with a place. If the place is a warehouse, the persons associated to the warehouse may be the warehouse manager. However, if the place was a customer, the person records may include the technician primarily responsible for the customer as well as his manager. This would be for escalations purposes. You may specify more than one person for a specific relationship to a place.

The **Place** tab includes associated places, such as warehouses or repair centers. The global code, **place_relationship**, is significant to this tab. For example, if your place record is a truck that gets replenished from the warehouse, the place relationship should be Place for Stock = the warehouse.

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CORE ENTITIES: PLACE

OTHER TABS

Place Tab	Description
<div>Contacts6</div>	Records the Contacts associated with the Place who are not employees (ie Persons),eg customer representatives based at the site
<div>Skills1</div>	Defines the skills and certification associated the Place and Product; used to determine appropriate work assignment
<div>Products5</div>	Includes Products associated with a Place, (the installed base), with part, serial number, and warranty information
<div>Service History2</div>	Listing of Requests and RMAs associated to the Place
<div>Payments</div>	Records monetary transactions related to the Place
<div>Quotes</div>	Records quotes (offers to perform specified work or create specified contract) associated to the Place

TIP: You can assign a Skill to a Place to show language proficiency requirements

TIP: This will show Payments made using PayPay or another API

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The place record has tabs that are specific to the place record and there are tabs that are generic, such as Notes, Events and Attachments, and used across multiple core entities. We will discuss those in later lessons.

Skills includes skills and certifications associated with the place and product and is used to determine which person is the most appropriate match during work assignment. For example, a product might require a certain type of certifications where a place might require proficiency in a certain language.

Product includes products associated with a place, sometimes known as the install base or customer assets, with part, serial number, and warranty information. We will discuss products in a later lesson.

Service History includes listing of requests and RMAs that are related to this place.

Payments are the recording of monetary transactions you perform. You can elect to use FSM to process card transactions using either a PayPal API or another API that you implement. This tab includes payments made for this place.

A **quote** is an agreement between you and your customer to perform the specified work or to create a contract at the specified price. This tab includes quotes associated with this place.



Show a customer record (Whose Place = CUST)

Demonstrate the significant fields of the Place record: Whose Place, Allow Products, Stock Parts, Billing Place, Calendar ID

Demonstrate the different tabs on the Place record such as place-person relationship, place-place relationship

Demonstrate the different buttons on the Place record



WRAP-UP



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