



IFS CLOUD - AURENA USER GUIDE

IFS Cloud

Username

 Ex. johnsmith

Password





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AURENA USER GUIDE

This user guide highlights the key web Aurena User functions and features in IFS Cloud

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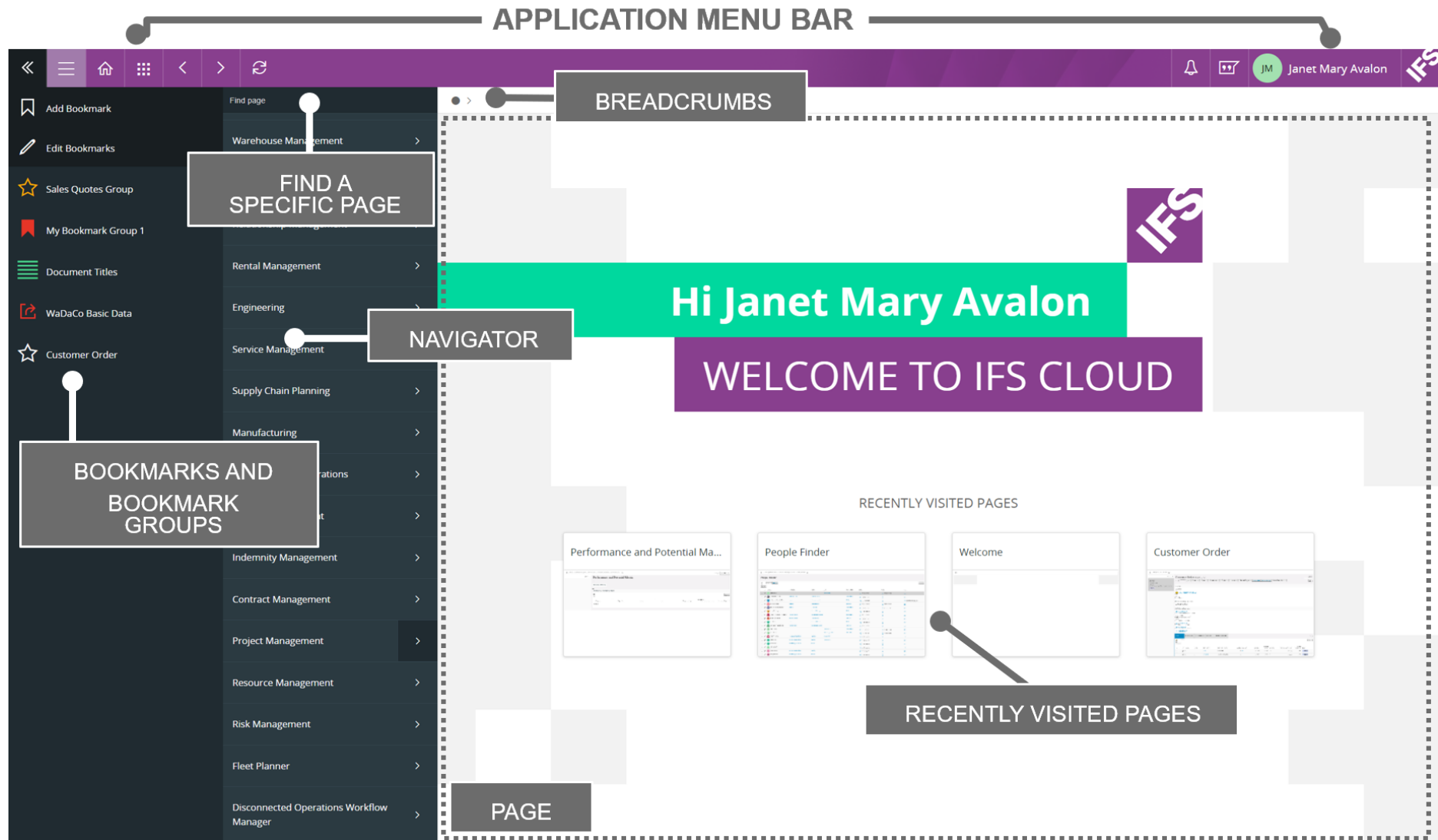
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GENERAL LAYOUT



General Layout

APPLICATION MENU BAR	<p>Always in view.</p> <p>Contains general Navigation icons and User specific information.</p> <p>Please see details of the Application Menu Bar Contents later in this Guide.</p>
BOOKMARKS	<p>Shortcuts to a user's regularly used pages.</p> <p>Fast and direct access to specific pages which can be configured to auto show specific data on opening.</p> <p>Bookmark Groups can also be added (use type of 'group').</p>
NAVIGATOR	<p>Textual Navigator for access to all Pages.</p> <p><i>Note: ideally do not use the Navigator on a regular basis.</i></p> <p>Toggle the navigator on/off using the icon in the Menu Bar.</p> <p><i>Hint; most Users should use Bookmarks or Breadcrumbs for their main Pages.</i></p>
FIND a SPECIFIC PAGE	<p>To look for a specific page simply type in the first letter(s) of each word, use starting letters or =.</p> <p>For example: use = to find a specific page i.e. = Part (where Part is the entire page name), My Doc – will find all pages with My Doc in their heading regardless of position, t c d – will find entries like Time Card Details, Task Card Basic Data etc. Use X to clear any entry.</p>
BREADCRUMBS	<p>Shows Navigation levels/steps.</p> <p>A user can navigate from here with no need to use the Navigator.</p> <p><i>Note: any active Navigator Designer changes for the user context will be used in the breadcrumbs.</i></p>
RECENTLY VISITED PAGES Main page	<p>User can navigate directly to a displayed page – the last four are shown here.</p> <p><i>Note: there is also a Recently Visited Pages icon on the Application Menu Bar that will show the last eight pages.</i></p>

HINT – Use F11 for full screen mode to make best use of the available space.

APPLICATION MENU BAR

APPLICATION MENU BAR

The screenshot displays the IFS application interface with the following callouts and elements:

- OPEN/CLOSE BOOKMARKS:** Points to the bookmark icon in the top left navigation bar.
- RECENTLY VISITED PAGES:** Points to the 'Sales Parts' breadcrumb navigation.
- FORWARD:** Points to the right arrow icon in the top navigation bar.
- SEARCH:** Points to the search icon in the top navigation bar.
- HOME:** Points to the home icon in the top navigation bar.
- BACK:** Points to the left arrow icon in the top navigation bar.
- REFRESH:** Points to the refresh icon in the top navigation bar.
- NAVIGATOR OPEN/CLOSE:** Points to the hamburger menu icon in the top navigation bar.
- AURENA BOT:** Points to the 'AURENA BOT' label in the bottom right area.
- USER MENU AND OPTIONS:** Points to the user profile section (JM Janet Mary Avalon) in the bottom right area.
- NOTIFICATIONS:** Points to the notification bell icon in the bottom right area.

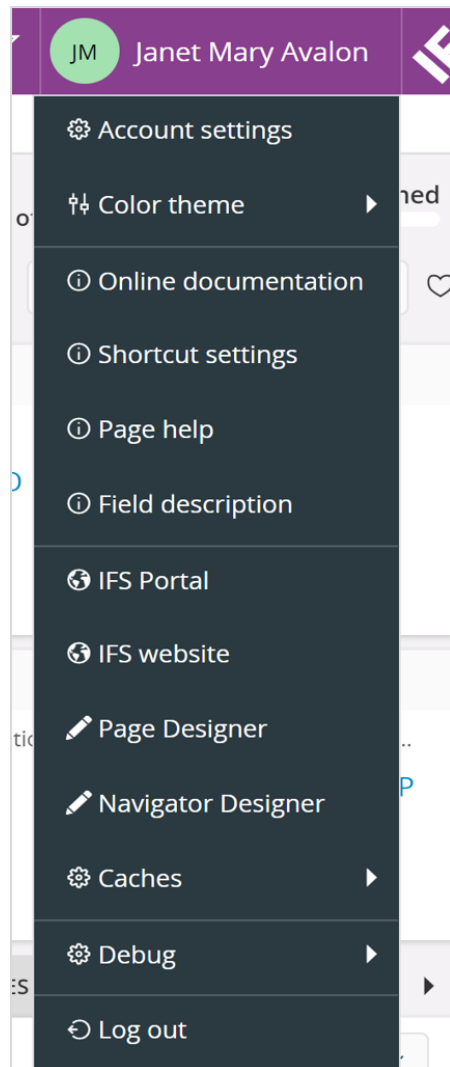
The main content area shows a table of 'Sales Parts' with columns: Part No, Inventory UoM, Configurab..., DOP, and Purch. The table lists various parts such as '5001A1 - Variation on Shock Absor...', '5002 - relay shaft', '5003 - gear lever', etc.

Application Menu Bar

Displayed at the top of all Pages

BOOKMARKS OPEN/CLOSE	Shortcuts to regularly used pages. Use the EDIT Bookmarks icon to change/delete a bookmark. Bookmark Groups can be added by selecting the Type of 'group' when you Add a new Bookmark.
NAVIGATOR OPEN/CLOSE	Click to Open/Hide the Navigator. Hide the Navigator whenever possible to make best use of space. <i>Hint: Set up all your regularly used pages as Bookmarks.</i>
HOME	Start Page – set your user Home page in recently visited pages.
RECENTLY VISITED PAGES	Shows your last eight visited pages. Click on the HOME icon to set this page as your Start Page.
BACK and FORWARD (PAGES)	Appears when relevant and when in full screen mode (F11).
REFRESH DATA	Renew/refresh the data displayed. Appears when relevant and when in full screen mode (F11).
SEARCH	Search for page data records – see specific section in this guide on search and filter. Appears when relevant. <i>Note: a gold tick means an active search is in place.</i>
NOTIFICATIONS	Displays active Notification messages for the user. Use the [3x dot] icon for direct access to message overview pages – Notifications, Tasks, Scheduled Reports, Report Archive and Subscriptions. Use the cog icon to configure the contents of this view.
AURENA BOT	Only active if enabled for the environment. See the Appendix for an overview. Chat BOT - ability to 'ask' (type a message) for certain actions in plain language.
USER MENU and OPTIONS	Please see the details later in this guide.

USER MENU AND OPTIONS



USER MENU and OPTIONS

Note: the options displayed to the User may vary

For example: Page and Navigator Designers (etc) may not be displayed - access these in Solution Manager if permitted.

Hint – Account Settings:

Use the currency grouping to display comma's in currency fields.

Currency Formatting Options
Decimal Places
2
Use Grouping
<input checked="" type="checkbox"/>

User Menu and Options

Note: The options will depend on a user's access rights and also the type of page that is active.

ACCOUNT SETTINGS	General User and Personal Information. i.e. change language, currency format and if currency grouping is used (show currency commas). <i>Hint: find the release/update you are using at the bottom left of this page.</i>
COLOR THEME	Select the User theme.
ONLINE DOCUMENTATION	Access to user documentation – Business Models, Functional Models, Topics of key features, Technical and general Client use.
SHORTCUT SETTINGS	Keyboard Shortcut options
PAGE HELP	Shows documentation for the active page.
FIELD DESCRIPTION	Will display field icons to show descriptions. Click the (i) next to a field name to display.
IFS PORTAL and IFS WEBSITE	IFS Portal is a secured network zone with systems and services accessed over the Internet. With an account you can, depending on role, access IFS services for information, collaboration, development and support. IFS Website – a direct link to the IFS external web pages (choose your country from the web page).
PAGE and NAVIGATOR DESIGNER	May not show as options from the User Menu. These aspects are not in this Guide. Ability to configure pages and the navigator by specific Context.
CACHES and DEBUG	May not show as options from the User Menu. These aspects are not in this Guide. These options are not typically relevant for end users
LOG OUT	End your User session.

NAVIGATION OPTIONS

BOOKMARKS & BOOKMARK GROUPS

- Add Bookmark
- Edit Bookmarks
- Welcome

BREADCRUMBS

● > Sales > Part ⊘ Package Part ↺

Search

Site ▾

- Sales Part
- Sales Parts**
- Find Part By Characteristics
- Package Part

NAVIGATOR

Find page

- Human Capital Management >
- Job Rate Management >
- Technician Portals >

RECORD SELECTOR

filtered records in detailed page

Sort by ▾

P10266_1

Customer: ABC
Site: 501
Wanted Delivery Date/... 15/04/2019, 0...

Planned

PD100121

Customer: SITE-64P1
Site: 501
Wanted Delivery Date/... 13/07/2020, 0...

Invoiced/Closed

Customer

Order No

S10032

Order Amounts

Total Net Amount/Base

COMPACT RECORD SELECTOR

Customer Order S10032 ▲ 6 of 6

Order No	Customer	Site	Wanted Delivery Date/Time	Statu
P10266_1	ABC	501	15/04/2019, 00:00	Plann
PD100121	SITE-64P1	501	13/07/2020, 00:00	Invoic
S10016	S502	501	03/06/2019, 00:00	Plann
S10018	ABC	501	16/05/2019, 00:00	Invoic
S10026	ABC	501	01/09/2020, 00:00	Plann

COMMAND MENU

use [.] period in a page

Available commands

Page Customer Order Line List







Release

Cancel

Send Order Confirmation

E-mail Order Confirmation

Navigation options – click icon to show/hide the function

BOOKMARKS		Create bookmarks (shortcuts) to regularly used commands. Add – add active page to bookmarks or a bookmark group. Edit - (includes the delete option). Move bookmark position – highlight/hold bookmark, wait for shadow then drag to new position. <i>Note: Bookmark Groups can contain many other Bookmarks. Use the type of 'Group' when a new bookmark is created. Groups cannot be Edited at this time.</i>
BREADCRUMBS		Shown above every page. Shows the navigation path – use instead of the main navigator. Use the “dot” to return to Home page.
NAVIGATOR		Navigation to all pages. Click to Hide whenever possible to make best use of space. <i>Hint: Set up all your regularly used pages as Bookmarks.</i> Note: Two tone Navigator item – words go to a Lobby & arrow to a secondary navigator item. Use Control Click to open Navigator item in a new window.
RECORD SELECTOR		Shown in detailed pages. Open/Close – choose specific record for direct navigation. Sort By options in top bar then select Asc/Desc to sequence records. Click in bar to sort and X to cancel sort.
COMPACT RECORD SELECTOR		Next to Page Title. Use arrow to view selected/filtered records, scroll if required to view all. Click to select a specific record. <i>Note: not as efficient as the Record Selector.</i>
COMMAND MENU in a page		Use the period/dot [.] key in a page for the Command Menu to appear. Start to type in the [Available Commands] bar to restrict the menu. Choose a command to action.

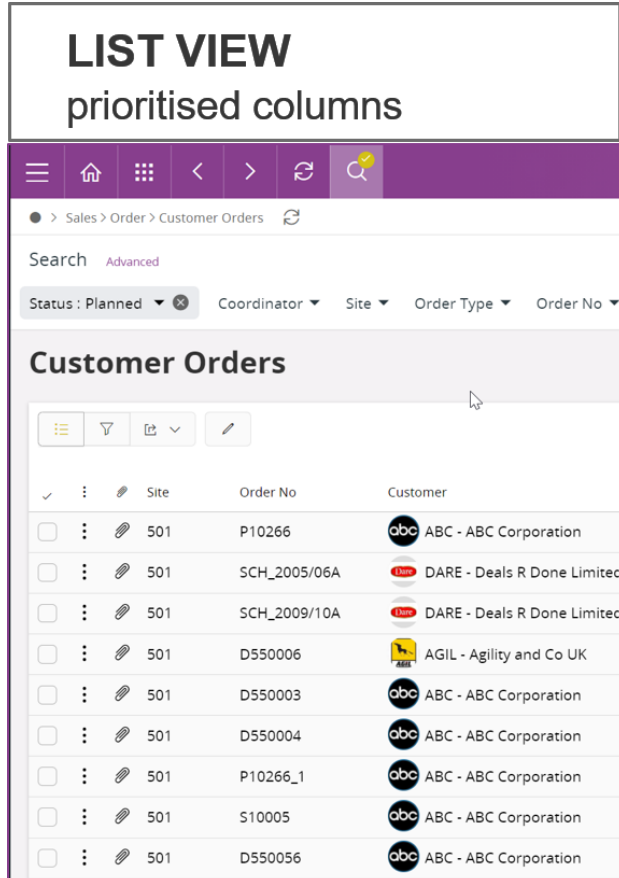
Note: this guide does not cover other device emulations

WORKING WITH LISTS ...

A List can be shown in different views – List, Table and Card pages are shown below.

LIST VIEW

prioritised columns

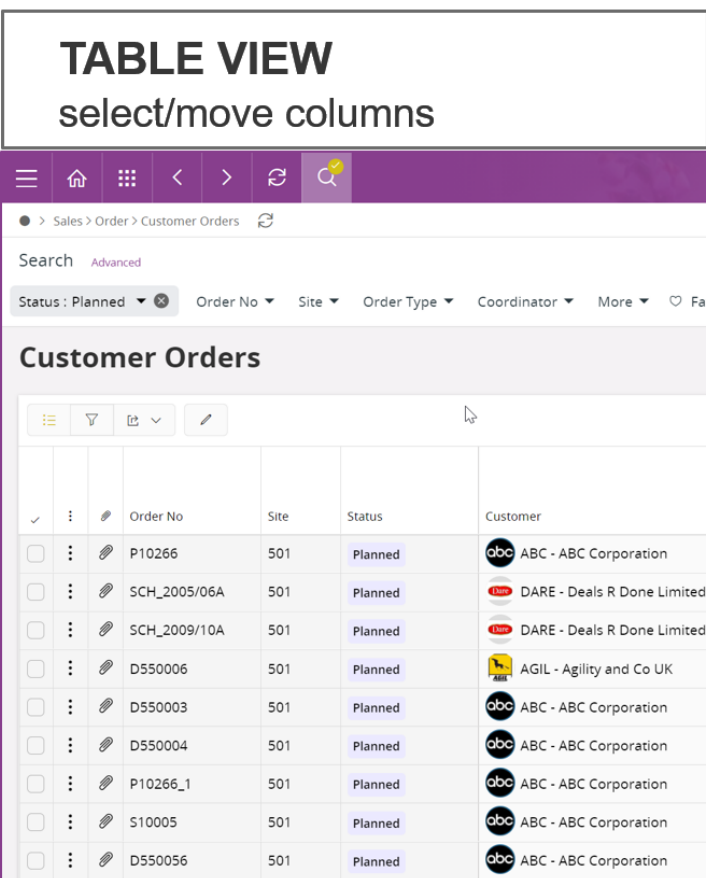


Customer Orders

✓	:	🔗	Site	Order No	Customer
<input type="checkbox"/>	:	🔗	501	P10266	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	501	SCH_2005/06A	DARE - Deals R Done Limited
<input type="checkbox"/>	:	🔗	501	SCH_2009/10A	DARE - Deals R Done Limited
<input type="checkbox"/>	:	🔗	501	D550006	AGIL - Agility and Co UK
<input type="checkbox"/>	:	🔗	501	D550003	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	501	D550004	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	501	P10266_1	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	501	S10005	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	501	D550056	ABC - ABC Corporation

TABLE VIEW

select/move columns

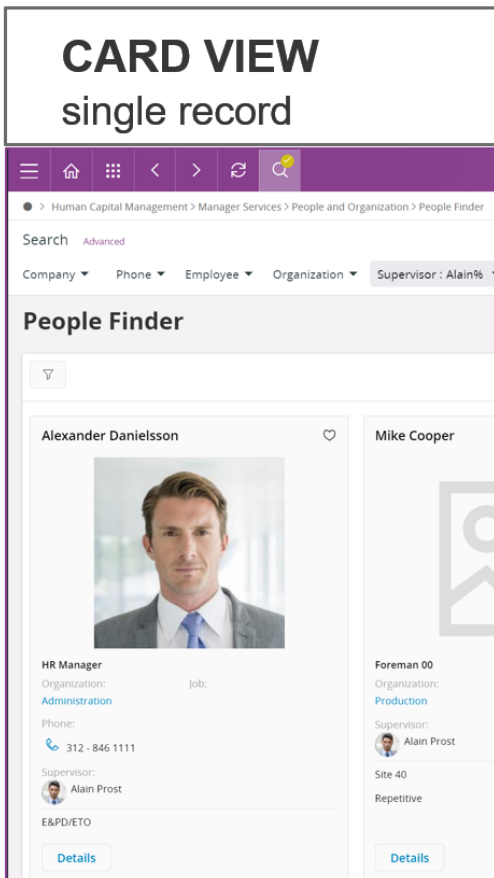


Customer Orders

✓	:	🔗	Order No	Site	Status	Customer
<input type="checkbox"/>	:	🔗	P10266	501	Planned	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	SCH_2005/06A	501	Planned	DARE - Deals R Done Limited
<input type="checkbox"/>	:	🔗	SCH_2009/10A	501	Planned	DARE - Deals R Done Limited
<input type="checkbox"/>	:	🔗	D550006	501	Planned	AGIL - Agility and Co UK
<input type="checkbox"/>	:	🔗	D550003	501	Planned	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	D550004	501	Planned	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	P10266_1	501	Planned	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	S10005	501	Planned	ABC - ABC Corporation
<input type="checkbox"/>	:	🔗	D550056	501	Planned	ABC - ABC Corporation

CARD VIEW

single record



People Finder

Alexander Danielsson

HR Manager

Organization: Administration

Job:

Phone: 312 - 846 1111

Supervisor: Alain Prost

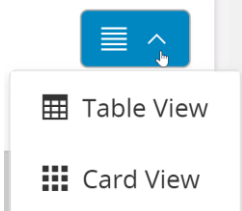
E&PD/ETO

Details

List - Table - Card - Box Matrix

Please Note:

- FAVOURITES will only appear in a View if the User sets this option in the Page Settings.
- The first 24 records will be displayed – then use [Show more] option at the bottom of a page
- Columns can only be frozen in a Table view.
- Click in a visible scroll bar to move the display faster – you can also drag the scroll bars.

	<p>Use the view selector icon on a page – top right – to select a specific view for the active page. Options shown will depend on the page.</p> <p>This example on the left shows List (current view), Table and Card view options. Box Matrix view will also be available on some pages.</p>
<p>LIST</p>	<p>A specific view of multiple records shown as a Table however no horizontal scroll or grid lines will be displayed. The information displayed ‘fits’ to the specific device in use. If a user Hides columns more will appear to ‘fit’ the available display. <i>Note: displays prioritised fields set by Design (but can be changed in the view settings)</i></p>
<p>TABLE</p>	<p>A specific view of multiple records with both horizontal and vertical scroll enabled. A column can be frozen (fixed) to always show this information when scrolling horizontally. <i>Note: user can determine the fields and sequence in view settings.</i></p>
<p>CARD</p>	<p>A visual view of information displayed in Card format. Options to drill to details.</p>
<p>BOX MATRIX</p>	<p>This is a grid/boxed display that compares information related to the axis details. <i>Example page where this is used – Design FMEA Analysis.</i></p>

WORKING WITH PAGES – SPECIFIC RECORD

PAGE AREAS – SPECIFIC RECORD

The screenshot shows a software interface for managing 'Customer Order'. The interface is divided into several sections, each with specific UI elements labeled:

- PAGE TITLE:** Located at the top left, above the 'Customer Order' header.
- ACTION BUTTON:** Located at the top center, above the 'COMMON ACTIONS' bar.
- NAVIGATION BUTTON:** Located at the top right, above the 'Copy Order' and 'Order History' buttons.
- RECORD SELECTOR OPEN/CLOSE:** Located on the left side, pointing to the 'Customer Order' record selector.
- CONTACT WIDGET:** Located on the left side, pointing to the 'Customer Order' contact information.
- REFERENCE LINK:** Located on the left side, pointing to the 'Customer Order' reference link.
- TABS:** Located on the left side, pointing to the 'LINES' tab.
- TAB SELECTOR:** Located on the right side, pointing to the 'TAB SELECTOR' button.
- SECTION*:** Located on the right side, pointing to the 'SECTION*' labels.
- RECORD SELECTOR:** Located at the bottom left, pointing to the 'P10266_1' record selector.

The main content area displays a table of order lines with columns: Line No, Del No, Sales Part No, Sales Part Description, Sales Qty, Sales UoM, Price/Curr, Price Incl Tax/Curr, Price UoM, and Supply Code. The table contains 5 rows of data.

Line No	Del No	Sales Part No	Sales Part Description	Sales Qty	Sales UoM	Price/Curr	Price Incl Tax/Curr	Price UoM	Supply Code
1	1	5005	relay plate SHOP order	1	EA	160.00	192.00	EA	Shop C
2	1	6008T	locking nut supply TRAN	1	EA	17.00	20.40	EA	Purch C
3	1	5000K	Product 5000 Kit	2	EA	3100.00	3720.00	EA	Pkg
4	1	6003	bracket	1	pcs	10.00	12.00	pcs	Invent Order
5	1	6011	steelite grey	4	I	11.00	13.20	I	Invent Order

Below the table, there is an 'Attachments' section with tabs for 'DOCUMENTS', 'APPROVAL PROCESS (1)', 'NON CONFORMANCE REPORTS', and 'RISKS'. The 'APPROVAL PROCESS (1)' tab is selected, showing a 'New Approval Step' button and a 'Copy Approval Template' button. Below these buttons, there is a list of approval steps, including '10 - Initial Approval for content' by Alain Prost.

* Sections are collapsible

Working with Pages – specific record

Every page for a single record has common functions and work areas – these are summarised below.

RECORD SELECTOR	Shows all the filtered records. Click on an entry to change the main display. Option to SORT BY in the top of the panel. <i>Hint: start to type to limit the options displayed.</i> Once a Sort is active then choose to sort by asc/desc using a click in the [Sort By <field>].
PAGE TITLE	Page name. An arrow enables the compact record selector. The number of filtered records is shown (i.e. 1 of 6).
ACTION BUTTON	Black text with down arrow – actions a process.
NAVIGATION BUTTON	Blue text – navigates to another page.
COMMON ACTIONS	The active actions for a page will be different depending on the user focus and page type. Please see the Common Actions section of this guide for specific details.
CONTACT WIDGET	Click on graphic to display and actively use details i.e. email, phone. <i>Note: there are different types of widget i.e. people, suppliers, customers etc.</i>
REFERENCE LINK	Usually next to a widget – hyperlinked to go to further details/new page.
TABS	Focused information areas related to the main record.
TAB SELECTOR	Use to move from one tab to another. Or click on the tab required.
SECTIONS	Click the section header to collapse/expand details. Some sections might be dynamically opened/collapsed. <i>Note: parallel sections need to be collapsed/opened separately.</i> <i>Hint: collapsing a section that is not regularly used saves display space.</i>

WORKING WITH PAGES – TABLE/LIST (1)

The screenshot displays the IFS Customer Orders interface. The top navigation bar includes a search icon and a breadcrumb trail: Sales > Order > Customer Orders. The main title is "Customer Orders". Below the title, there are three main sections: "COMMON ACTIONS" (with icons for list, filter, and share), "FILTER PANEL" (with various dropdown filters like Order No, Site, Status, etc.), and "FILTER/SEARCH SETTINGS" (with a search icon and a settings icon). The table itself has columns for Order No, Site, Status, Customer, Coordinator, Salesperson, Order Type, Wanted Delivery Date/Time, Agreement ID, Order Currency, Picking Lead Time, and Trade. The first row is highlighted with a blue background. A callout box labeled "OPTIONS" points to the "Order Type" column header.

Annotations:

- VIEW SELECTOR:** Located in the top right corner of the interface.
- SEARCH:** Located in the top navigation bar.
- COMMON ACTIONS:** Located below the title bar, containing icons for list, filter, and share.
- FILTER PANEL:** Located below the title bar, containing various dropdown filters.
- FILTER/SEARCH SETTINGS:** Located below the title bar, containing a search icon and a settings icon.
- OPTIONS:** A callout box pointing to the "Order Type" column header.

Order No	Site	Status	Customer	Coordinator	Salesperson	Order Type	Wanted Delivery Date/Time	Agreement ID	Order Currency	Picking Lead Time	Trade
D550622	501	Invoiced/Closed	ABC - ABC Corporation	DEMO3	CHLI	RES	31/12/2020				
D550623	501	Released	ABC - ABC Corporation	DEMO3	CHLI	NO	31/12/2020				
S10030	501	Planned	ABC - ABC Corporation	UK_DEMO11	CHLI	RES	10/09/2020, 00:00		GBP	0	
NCOPY001	501	Planned	DARE - Deals R Done Limited	UK_DEMO11	ANBO	NO	03/08/2020, 00:00	DAGR_1	GBP	0	
560163	501	Released	ABC - ABC Corporation	JAGR	CHLI	RES	08/07/2020, 00:00		GBP	0	
S10027	501	Released	ABC - ABC Corporation	UK_DEMO11	CHLI	RES	01/07/2020, 00:00		GBP	0	
S10026	501	Planned	ABC - ABC Corporation	UK_DEMO11	CHLI	RES	15/06/2020, 00:00		GBP	0	
S10029	501	Planned	ABC - ABC Corporation	UK_DEMO11	CHLI	RES	15/06/2020, 00:00		GBP	0	
NCOPY002	501	Planned	DARE - Deals R Done Limited	UK_DEMO11	ANBO	NO	08/06/2020, 00:00	DAGR_1	GBP	0	
S10028	501	Planned	ABC - ABC Corporation	UK_DEMO11	CHLI	RES	03/06/2020, 00:00		GBP	0	
C900011	502	Planned	S503 - Internal Site 503	DEMO1	JA JEAN	IS	22/05/2020, 00:00		GBP	0	
D550671	502	Released	ABC - ABC Corporation	ANID	CHLI	NO	22/05/2020, 00:00		GBP	0	
D550672	503	Released	ABC - ABC Corporation	ANID	CHLI	NO	22/05/2020, 00:00		GBP	0	
D550628	501	Planned	ABC - ABC Corporation	CRJE	CHLI	RES	05/05/2020, 00:00		GBP	0	
D550626	501	Released	ABC - ABC Corporation	CRJE	CHLI	RES	30/04/2020, 00:00		GBP	0	

Working with Pages – Table/List (1)

SEARCH	Displays the highest level of search. See specific section in this guide.
VIEW SELECTOR	Select the page (view) style to use. Options may be different by page. See the section in this guide.
COMMON ACTIONS	The active, common actions, for a page will be different depending on the user focus and page type. See specific section in this guide.
FILTER PANEL	Select the 'filter' common action to display. See specific search/filter section of guide. The ability to specifically find/display records by multiple selection criteria within the page. <i>Important note: filter results will depend on the overall page search results.</i>
OPTIONS (three dots)	Save – Previous – Edit search options and View current saved searches. Ability to Copy Link of the displayed page will be active from the top Search options only.
FILTER /SEARCH SETTINGS	Determines the start-up behaviour of the page. Search Settings panel will be opened.

WORKING WITH PAGES – TABLE/LIST (2)

Customer Orders

Order No Site Wanted Delivery Date/Time Base Currency Status Order Type Agreement ID Block Type More Favorites Clear Q Settings

SELECT/DESELECT LINES	ACTIONS	ATTACHMENTS	FAVOURITES	BADGE	CUSTOMER	COORDINATOR	SALESPERSON	ORDER TYPE	WANTED DELIVERY DATE/TIME	AGREEMENT ID	ORDER CURRENCY	PICKING LEAD TIME	TOTAL
<input type="checkbox"/>		D550622	501	Invoiced/Closed	ABC - ABC Corporation	DEMO3	CHLI	RES	31/12/2020, 00:00		GBP	0	
<input type="checkbox"/>		D550623	501	Released	ABC - ABC Corporation	DEMO3	CHLI	NO	31/12/2020, 00:00		GBP	0	
<input type="checkbox"/>		D550624	501	Planned	ABC - ABC Corporation	UK_DEMO11			/2020, 00:00		GBP	0	
<input type="checkbox"/>		NCOPY001	501	Planned	DARE - Deals R Done Limited	UK_DEMO11			/2020, 00:00	DAGR_1	GBP	0	
<input type="checkbox"/>		560163	501	Released	ABC - ABC Corporation	JAGR			/2020, 00:00		GBP	0	
<input type="checkbox"/>		560164	501	Released	ABC - ABC Corporation	UK_DEMO11			/2020, 00:00		GBP	0	
<input type="checkbox"/>		S10026	501	Planned	ABC - ABC Corp	EMO11			/2020, 00:00		GBP	0	
<input type="checkbox"/>		S10029	501	Planned	ABC - ABC Corp	EMO11	CHLI	RES	15/06/2020, 00:00		GBP	0	
<input type="checkbox"/>		S10028	501	Planned	DARE - Deals R Done Limited	UK_DEMO11	ANBO	NO	08/06/2020, 00:00	DAGR_1	GBP	0	
<input type="checkbox"/>		S10028	501	Planned	ABC - ABC Corporation	UK_DEMO11	CHLI	RES	03/06/2020, 00:00		GBP	0	
<input type="checkbox"/>		C900011	501	Planned	S503 - Internal Site 503	DEMO1	JA JEAN	IS	22/05/2020, 00:00		GBP	0	
<input type="checkbox"/>		D550671	501	Planned	ABC - ABC Corporation	ANID	CHLI	NO	22/05/2020, 00:00		GBP	0	
<input type="checkbox"/>		D550672	503	Released	ABC - ABC Corporation	ANID			i/2020, 00:00		GBP	0	
<input type="checkbox"/>		D550628	501	Planned	ABC - ABC Corporation	CRJE			/2020, 00:00		GBP	0	
<input type="checkbox"/>		D550626	501	Released	ABC - ABC Corporation	CRJE	CHLI	RES	30/04/2020, 00:00		GBP	0	

Working with Pages – Table/List (2)

SELECT/DESELECT LINES	<p>Choose which lines to go to further details or run actions.</p> <p>Note: In some pages a Go To icon will appear in others a new Button will display to access further details.</p> <p><i>Hint: click on column tick to highlight all visible lines at once</i></p> <p><i>Hint: to select a range of lines-select one, use Shift key to select last line & range will be ticked</i></p>
ACTIONS (three dots)	<p>For selected (ticked) lines access next level information.</p> <p>Menu is displayed.</p>
ATTACHMENTS (paper clip)	<p>Opens the Attachment Panel for specific record. Please see specific section in this guide.</p> <p>Once selected the number of attachments for the record will be displayed.</p> <p><i>Note: the number of attachments is not shown by default</i></p>
FAVOURITES (heart)	<p>Only shown if specifically activated for the page in the Column Chooser.</p> <p>Favourites are ad-hoc short-term selections – manually switched on/off.</p> <p><i>Select Favourites in the filter panel to only display favourite records.</i></p>
BADGE	<p>Coloured high-lighted information. In this example: Status.</p>
CONTACT WIDGET	<p>Click on graphic to display and actively use details i.e. email, phone.</p>
REFERENCE LINK	<p>Usually next to a widget – hyperlinked to go to further details/new page.</p>
FILTER, FREEZE, HIDE COLUMN (three dots)	<p>Filter – search for specific values, will automatically enable this column in the main filter panel.</p> <p>Freeze to fix a column in place – will not move in scroll.</p> <p>Hide – column will be hidden (re-instate from the Table View settings).</p>
COLUMN SORT	<p>Click on the column heading to sort. Asc-Des-Original</p>

CHOOSE COLUMNS TO BE SHOWN



Options will differ depending on the type of view: List or Table

× **List View settings**

☒ Default mode (recommended)

☐ Configure columns manually

Additional fields

☐ Favorites

List View – is the default view

Prioritised columns that flex to the device
being used.

No grid lines and no scrolling.

× **Table View settings**

Available

Find

Order Type

Configurable

Configuration ID

Selected for display

Find

Order No

Line No

Del No

Table View - shows grid lines and will enable
scrolling across columns.

Choose columns to be shown in a view

AVAILABLE	Available columns are displayed on the left in Table View settings. Use Find (type ahead to restrict values) to find specific columns for display.
SELECTED FOR DISPLAY	Displayed columns and their order are shown in the right-hand table
MOVE COLUMNS Available <> Display	Use Shift key +click to select one or more columns and then use the << or >> icons to move. Columns will move to the bottom of the list.
CHANGE ORDER (RE-SEQUENCE)	Single column: position cursor over [=] then hold left hand mouse and drag to a new position. Multiple columns: Highlight the column(s) - use [shift] for multiple selection. Then use the [up/down arrow] to move one step at a time or use the 'arrows with a line' to immediately move the column(s) to the very top or very bottom of the list.
RESET TO ORIGINAL SETTINGS	As soon as column changes have been made a [Restore Defaults] option will be shown. Use this to reset all columns back to their original setting. Note: be certain this is what you want to do as this is actioned immediately.
FAVOURITES	Favourites must be manually enabled for all pages where required. Once enabled this setting will then be remembered by user.








*Hint - **Display more or less columns in a page:** use Control and mouse wheel to Zoom in/out.*


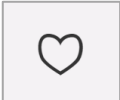







This will cause more/less columns and buttons to dynamically appear.







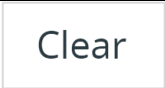
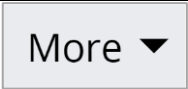

COMMON ACTIONS




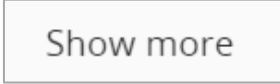


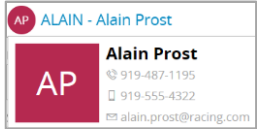
Common actions will appear at the top of a page or list.

Exactly which actions are shown to the User will depend upon the specific function being used or on user permissions.

ATTACHMENTS		View attachments. Please see specific section in this guide. Once viewed/opened this icon will show the number of attachments.
CALENDAR		Display active calendar (date picker) – select and SET date(s) to be used. Please see specific section in this guide.
CANCEL NEW		When you Cancel a message will appear to confirm that this is what you want.
COLUMN CHOOSER		Options for column visibility. Please see the specific section in this guide.
DELETE		Delete current/selected record(s).
DUPLICATE		Copy the active record or line. <i>Note: in the current release this is not active in all pages</i>
EDIT		Appears when a line(s) have been selected and edit is possible.

EXPORT or COPY/PASTE record(s)		Options can be: Export all (visible or all columns), Copy Data Link, Export Selected Rows (visible or all columns), Copy Selected Rows. Please see details later in this guide.
FAVOURITES		Click to mark a record as a Favourite. Filled = selected. Manually set and unset by the user. <i>Note: can be used to restrict some filtered lists to only show favourites.</i>
FILTER		Open/activate the filter selection panel. Please see search/filter section in this guide. <i>Note: not shown on a single record page.</i>
FOCUS ON FAVORITES		In the search/filter panel. Active if a filled heart is displayed. <i>Note: Favourites are ad-hoc record selections controlled by the user.</i>
GO TO details		Appears only when lines have been selected . <i>Note: In some pages a new Button will appear to use instead of the Go To details action.</i>
LOOK UP		Select a record (look up) from a list of values.
NEW		Add a new record Please see specific section in this guide.
NOTES		Add specific free format notes to a field. Opens side page to add/edit notes. <i>Note: hover over action to display notes or click to open side page.</i>
NOTIFICATION GROUPS		Subscribe to changes on objects and initiate tasks. Options shown will differ by page. Please see specific section in this guide.

OPTIONS		Click to view available options or actions or to display further tabs in a page <i>Note: options can be by search, filter, column, line. When all the page tabs cannot be displayed then this shows the hidden tabs to select from.</i>
PIN		Use to pin (set in view) information. Example: contact widget or reference link. <i>Note: need to unpin to remove display, this can restrict the view of other fields.</i>
PREVIEW CARD		For relevant hyperlinked/reference fields. Shows preview of specific data. Options in preview include: favourites, pin (keep open), GoTo details and close preview card. <i>Note: pinning multiple preview cards may restrict the view of other fields.</i>
RECORD SELECTOR		Open or Close the Record Selector when this is available.
SAVE		Save new records and changes. Will only be displayed when relevant. Please see specific section in this guide.
SEARCH		Show/hide search features in the application bar. The number indicates an active search with the number of current records.
SEARCH – [CLEAR]		Use to clear (cancel) the current search/filter criteria.
SEARCH/FILTER add more fields		Add more fields to the search/filter area – these will be remembered by user. <i>BEWARE – The 'reset' option <u>removes all fields in view.</u></i>
SEARCH/FILTER options		Options to save, previous, edit searches. This option at the <u>top</u> of a page includes the ability to Copy Link.

SEARCH/FILTER settings		Opens settings to determine the start-up behaviour of the specific page. Please see details later in this guide.
SELECT – DESELECT lines		Tick column header & all lines will be ticked & nos of lines displayed will be shown. <i>Note: initially 24 lines max will be shown or as determined by search/filter.</i>
SELECT VIEW		Shows the available views for a page - change the page view here. This will be remembered by user. <i>Note: the default view is usually a List</i>
SHOW MORE display		If further lines are available this action will display at the bottom of the page. Use to show the 'next (max) 24' lines.
SLIDER		A way to activate a specific option – slide to the right to enable, to the left to disable. Blue background means active.
SUBSCRIBE and TASKS		The ability to subscribe to messages about data changes and to set up user Tasks. Please see separate section in this guide.
WIDGET		Click on graphic to display and actively use details i.e. email, phone. <i>Note: there are different types of widget i.e. people, suppliers, customers etc.</i>

Hint: use control +mouse scroll to zoom in/out page and enable display of all active buttons.

SEARCH AND FILTER – INTRODUCTION


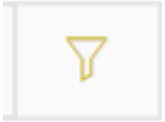
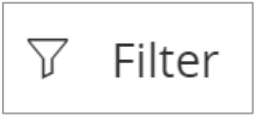
The screenshot shows the 'Purchase Order Lines' interface with several search and filter annotations:

- ADVANCED**: Points to the 'Advanced' search tab.
- BASIC**: Points to the 'Basic' search tab.
- PAGE SEARCH**: Points to the search icon in the top navigation bar.
- Gold = active**: Points to the search icon in the top navigation bar.
- REMOVE FIELD SEARCH**: Points to the 'X' icon next to a search field.
- (RE)RUN SEARCH**: Points to the search icon in the search options menu.
- CLEAR ACTIVE SEARCH**: Points to the 'Clear' button in the search options menu.
- SEARCH SETTINGS**: Points to the 'Settings' button in the search options menu.
- SEARCH OPTIONS**: Points to the search options menu.
- COLUMN FILTER**: Points to the column filter icon in the table header.
- FILTER**: Points to the filter icon in the table header.
- Gold = active**: Points to the filter icon in the table header.

The interface includes a search bar with filters for PO Line Status, Site, Order No, and Currency. Below the search bar is a table of Purchase Order Lines with columns for Currency, PO Line Status, Order No, Site, Line No, Release No, Rental, Supplier, Part No, and Description.

✓	:	Currency	PO Line Status	Order No	Site	Line No	Release No	Rental	Supplier	Part No	Description
<input type="checkbox"/>	:	GBP	Closed	200108	501	1	1	No	ABC - ABC Supplies UK Limited	50015	shock absorber (ms)
<input type="checkbox"/>	:	GBP	Stopped	SCH_2003/04	501	1	1	No	ABC - ABC Supplies UK Limited	6017	tyre X schedule
<input type="checkbox"/>	:	GBP	Arrived	D555002	501	1	1	No	ABC - ABC Supplies UK Limited	6018	steel rim
<input type="checkbox"/>	:	GBP	Released	S133010	501	1	1	No	ACORN - Acorn Commodities	6000	stop
<input type="checkbox"/>	:	GBP	Released	S133009	501	1	1	No	PACOR - PACOR UK Supplies	6019	sprocket

Search and Filter Introduction:

	<p>There are 3 levels of search/filter:</p> <p>(1) from the Application Menu Bar – this is the master search for the page Basic – user selects the search fields Advanced – user can change a generated statement A gold indicator shows that an ACTIVE search is in place.</p>
	<p>(2) from a List (filter). A gold filter means an ACTIVE filter is in place (based on the active top search).</p>
	<p>(3) by Column within a list - use the three dots to select filter. <i>Note: using a column filter will <u>automatically</u> add the field to the Filter panel.</i></p>


Remember :

A GOLD indicator means an active search is in place - this will directly influence the results of your search/filter.

An active top search restricts the filter results in the page and the columns

Use the search/filter actions to open/hide the relevant panels.



General Search and Filter:

CLEAR FIELD	Use the [X] displayed to the right of a field to clear its selection.
CLEAR ACTIVE	Use [Clear] to remove the active search or filter.
ADD MORE FIELDS	Use [More] to add further fields to the search/filter panes. <i>Note: only one new filter field can be added at a time using [More].</i>
RESTRICT DISPLAY	Start to type to display matching values in reference fields.
RESET	Use [More] and the Reset option to remove all the columns chosen and return to the default. Be certain this is what you want to do as they will cleared immediately.
MATCH CASE	<div>  <p>To specifically match the case of the search/filter use the [Aa] action. <i>Note: toggle to change - active when square surround appears.</i> <i>Hint: check this setting if the results are not as expected.</i></p> </div>
SYNTAX	Use the (?) icon to display the available syntax. See supported syntax section in this guide.
DATE PICKER FIELDS	Please see Working with Dates in this guide.
DATA TYPE FIELDS	<i>Note: data type dependant fields will behave differently for search and filter</i> <i>Example: status fields in top search may show a list of entries – tick to select values.</i> <i>Status fields in filter panel may allow you to key in specific entries.</i>

General Search and Filter continued:

SETTINGS	Displays the options for starting a page with a search. Please see specific details in this guide.
OPTIONS (three dots)	Save – Edit – Previous options. Copy Link only from page options Please refer to details in this guide.
COMBINED SEARCH FIELDS	Where fields have 'combined values' these are separated when searching for specific criteria. For example: Project > name and ID, Site > name and ID.

Using filter with Favourites:

FIND (set Favourites)	<p>Use the filter field arrow to display the Find option.</p>  <p>Find opens a new page with specific details for that field. Set your Favourites here to use to restrict the values displayed <i>For example: in lists of basic data values</i></p>
ONLY SHOW FAVOURITES	<p>Once set as above use the heart icon next to the Find option to <u>only</u> show your favourites.</p> 

General Search and Filter – syntax values

Please note:

The default syntax value is 'blank/empty' - this will display all relevant values.


Use the (i) icon to display the syntax values that can be used

-blank-	... starts with (default)	~	...contains
=	...equals	!~	...not contains
!=	...is not equal to	%	...ends with
>=	...is greater than or equal to	!%	...not ends with
>	...is greater than	<>	...is empty
<=	...is less than or equal to	!<>	...is not empty
<	...is less than	;	search for multiple values (OR search)
..	...between		

Hint: If your search does not return the expected results then check for an active search at the top of the page.

Note that a search and a filter can both be active - the filter will be based on the results of the search.

Save a search

 <div><div>Save search</div><div>Previous search</div><div>Edit saved searches</div></div>	<p>SAVE: add specific name and optional notes.</p> <p><i>Note: when Saving a subsequent search be certain to 'Save as New'.</i></p> <p><i>Beware: the default is to 'Modify Existing'- take care not to overwrite unless this is what you want to do.</i></p> <p>PREVIOUS: auto runs the previous search used</p> <p>EDIT: select specific search, change the name and notes</p>
<div>Copy Link</div>	<p>EDIT > Copy Link button</p> <p><i>Note: only available from top search</i></p>

Be Aware: A search and a filter can both be active. The filter will be based on the results of the search.

START A PAGE WITH A SEARCH

Settings at the page and filter levels determine how a page starts

SEARCH SETTINGS

Run search

☒ When criteria is changed

☐ Only when search button pressed

Startup behavior

☐ Show default data

☒ Use search

☐ New search

☐ Previous search

☒ Saved search

Accessed from the page search or filter panels settings action.

Settings

Note: the filter panel does not include the Saved Search option

Saved Search notes are displayed for information.


☒ Saved search

Parts start with a 60 ▼

Notes

I

Start a page with a pre-defined search:

RUN SEARCH	
When criteria is changed	Automatically displays data when search details are changed.
Only when search button pressed	When search criteria is changed the Search action MUST be pressed to display the result. The action command will be boxed in and will  move to remind you of this.

STARTUP BEHAVIOUR	
Show default data	
Use Search New search	Opens with 'use search to find data' message.
Previous search	The last general search you used.
Saved search	The defined saved search when the page is opened.

ADVANCED SEARCH

BASIC SEARCH

Search **Advanced**

PO Line Status : (2) Released;Confirmed ▼ ✕

Site : 501 ▼ ✕

Order No ▼

Line No ▼

ADVANCED SEARCH

Search **Basic**



((Objstate = IfsApp.PurchaseOrderLinesHandling.PurchaseOrderLineState'Released' OR Objstate = IfsApp.PurchaseOrderLinesHandling.PurchaseOrderLineState'Confirmed')) AND Contract = '501'

Search **Basic**



((Objstate = IfsApp.PurchaseOrderLinesHandling.PurchaseOrderLineState'Released' OR Objstate = IfsApp.PurchaseOrderLinesHandling.PurchaseOrderLineState'Confirmed')) AND

I

Advanced search – high level comments

Advanced Search is only available from the Application Bar

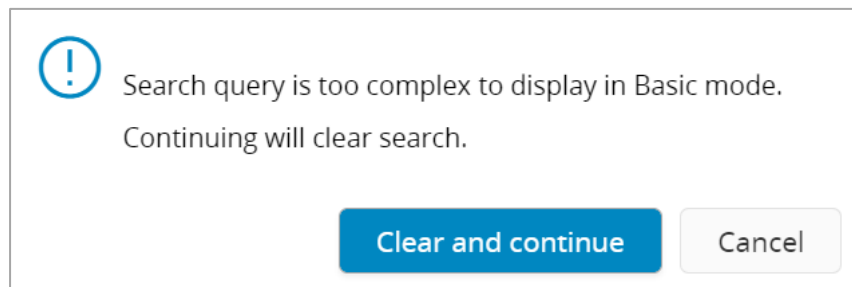
Green – search is OK

Red – search has an error

If you hover over the red box information text will be displayed that indicates what the cause of the error is.

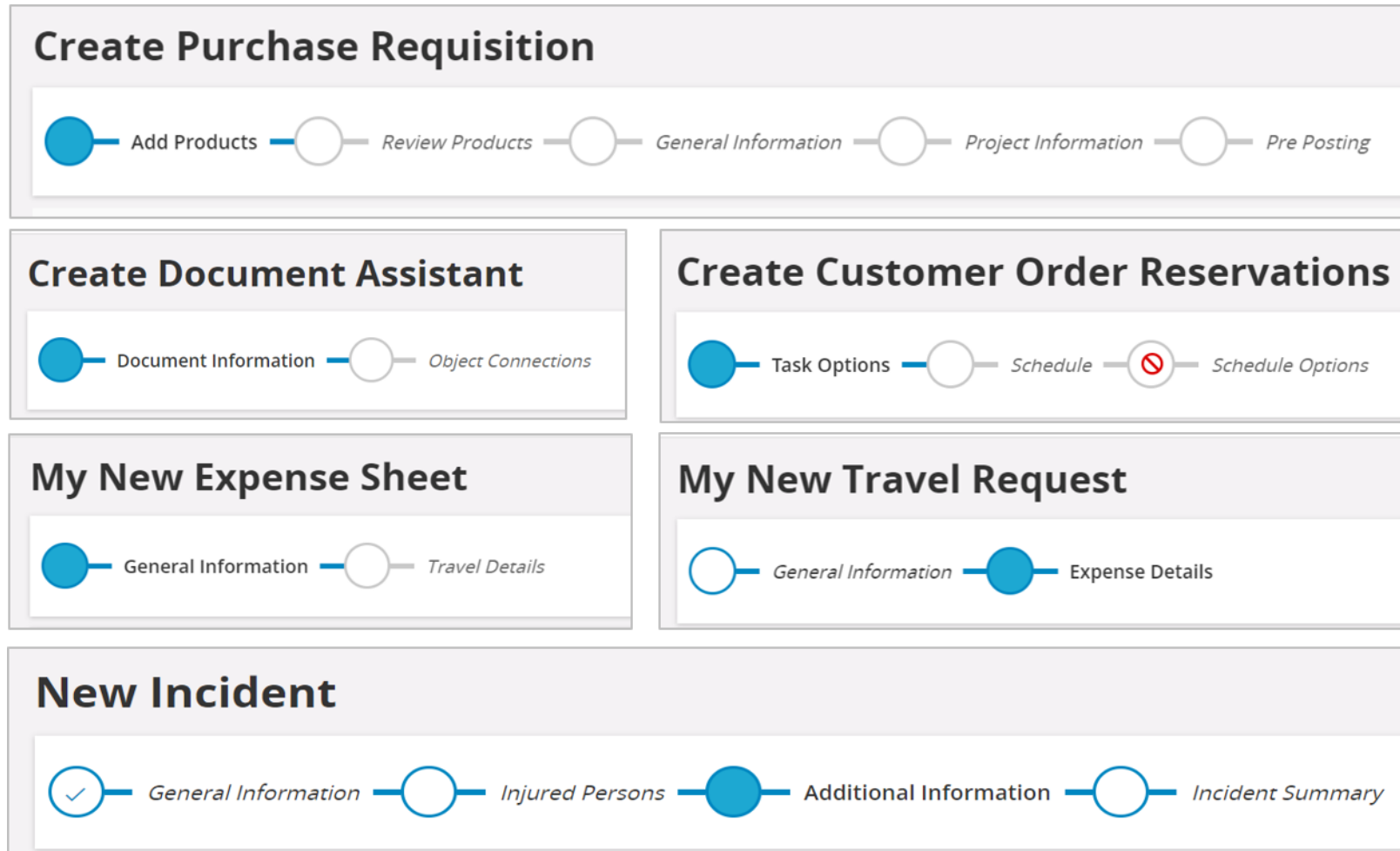
Experienced users can change the advanced search.

Depending on the complexity of the search expression sometimes it is possible to switch from advance to basic search – when this is not possible the following message will be displayed:




ASSISTANT

Examples include:



Assistant

Logically guide the user when creating a new record(s).

GENERAL ASSISTANT INFORMATION	<p>Guided data entry to create new records.</p> <p>Click on a specific step to move forward and backwards</p>
PROHIBITED STEPS 	<p>Will indicate when a step is not permitted.</p>
MANDATORY INFORMATION	<p>Mandatory fields will be colour coded.</p>
	<p>A toast (pop-up) message will confirm the process has been completed. Please see section on Toast messages in this guide.</p>

TIMELINE

SELECT WHICH TIMELINE CATEGORIES TO DISPLAY

Timeline

▼ Show categories (3)

ACTIVATE TIMELINE DISPLAY EVENTS

Employee Timeline Events		
<div> ⋮ 🔍 📄 + 🗑️ 📅 🔔 ▼ Edit Timeline Event </div>		
Timeline Event	Display Event	Event Message Text
Welcome Aboard	<input checked="" type="checkbox"/>	Joined <COMPANY_NAME>.
Birthday	<input checked="" type="checkbox"/>	Happy Birthday <EMPLOYEE_FIRST_NAME>! Have a Blast!
Qualifications	<input checked="" type="checkbox"/>	Obtained a new educational qualification; <EDUCATION_LEVEL>.

Employee Timeline Janet Avalon (90032) ▼

<< 🔔 ▼

Timeline

▼ Show categories (4)

2020

Oct

Birthday

Happy Birthday Janet ! Have a Blast !

Birthday 05/10/2020, 00:00

Mar

Work Anniversary

Celebrates 2 Year(s) at Company UK1 !

Work Anniversary 22/03/2020, 00:00

2018

CLICK TO SORT
TIMELINE
ASC/DESC

CLICK YEAR TO
DISPLAY/HIDE
MONTHS




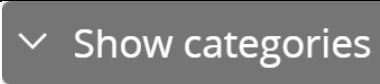
CLICK MONTH TO
DISPLAY/HIDE
EVENTS

Timeline

A visual Timeline view of specific information by year, month and event.

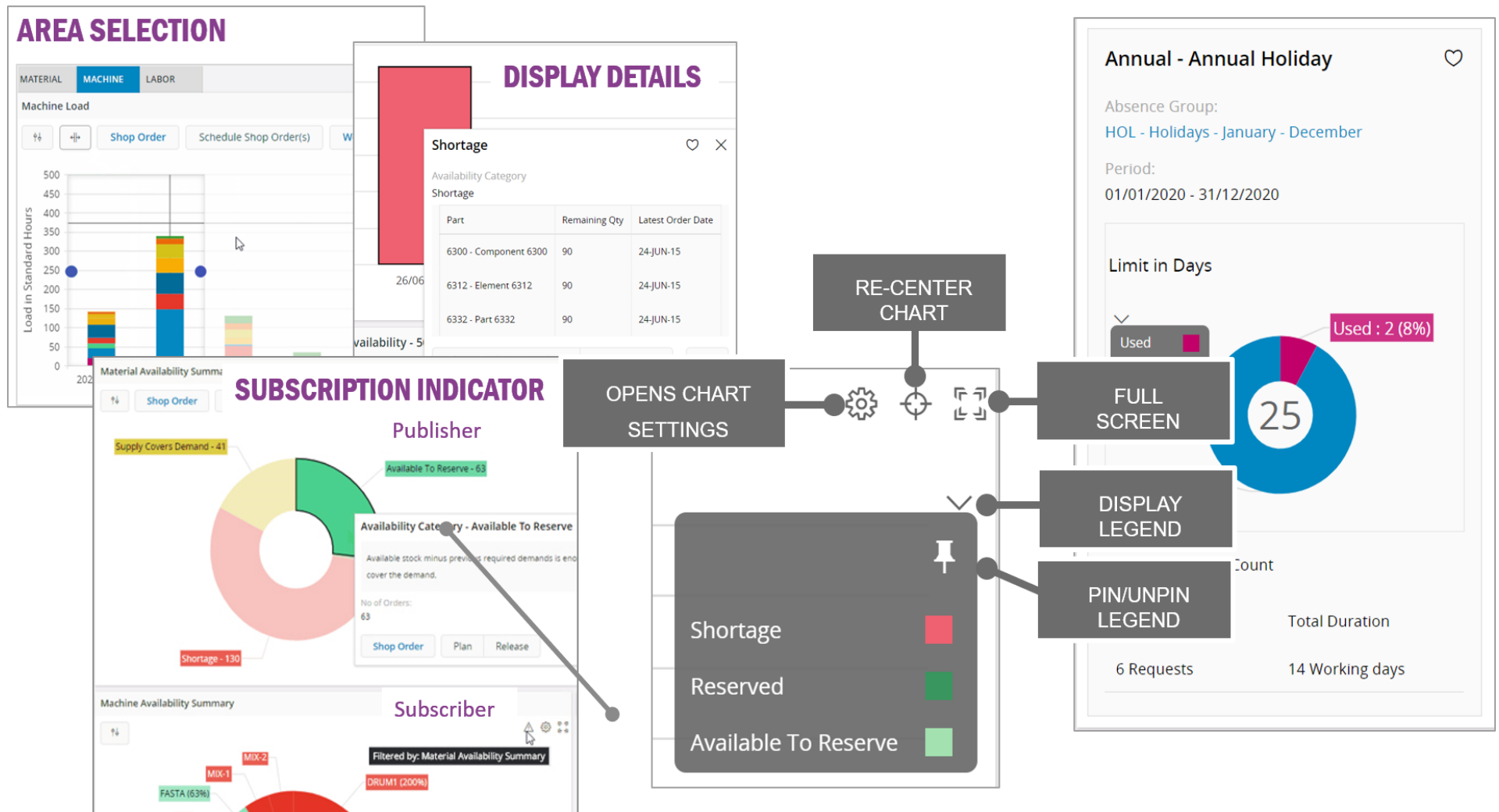
Easy click to open/close, sort asc/desc, specific timeline information.

Ability to select which Timeline categories are interactively displayed – can be changed dynamically for the view.

	Click to sort the displayed Timeline in ascending or descending sequence
	Click on a Year to display or hide the months/events for that year.
	Click on a Month to display or hide the specific events for that month.
	System will display the number of different active categories – click to display/hide specific events within a category.

Note: Employee Timeline Events can be specifically activated for display/or not. The activation/settings of Employee Timeline Events is typically a master user action.

CHARTS



Charts

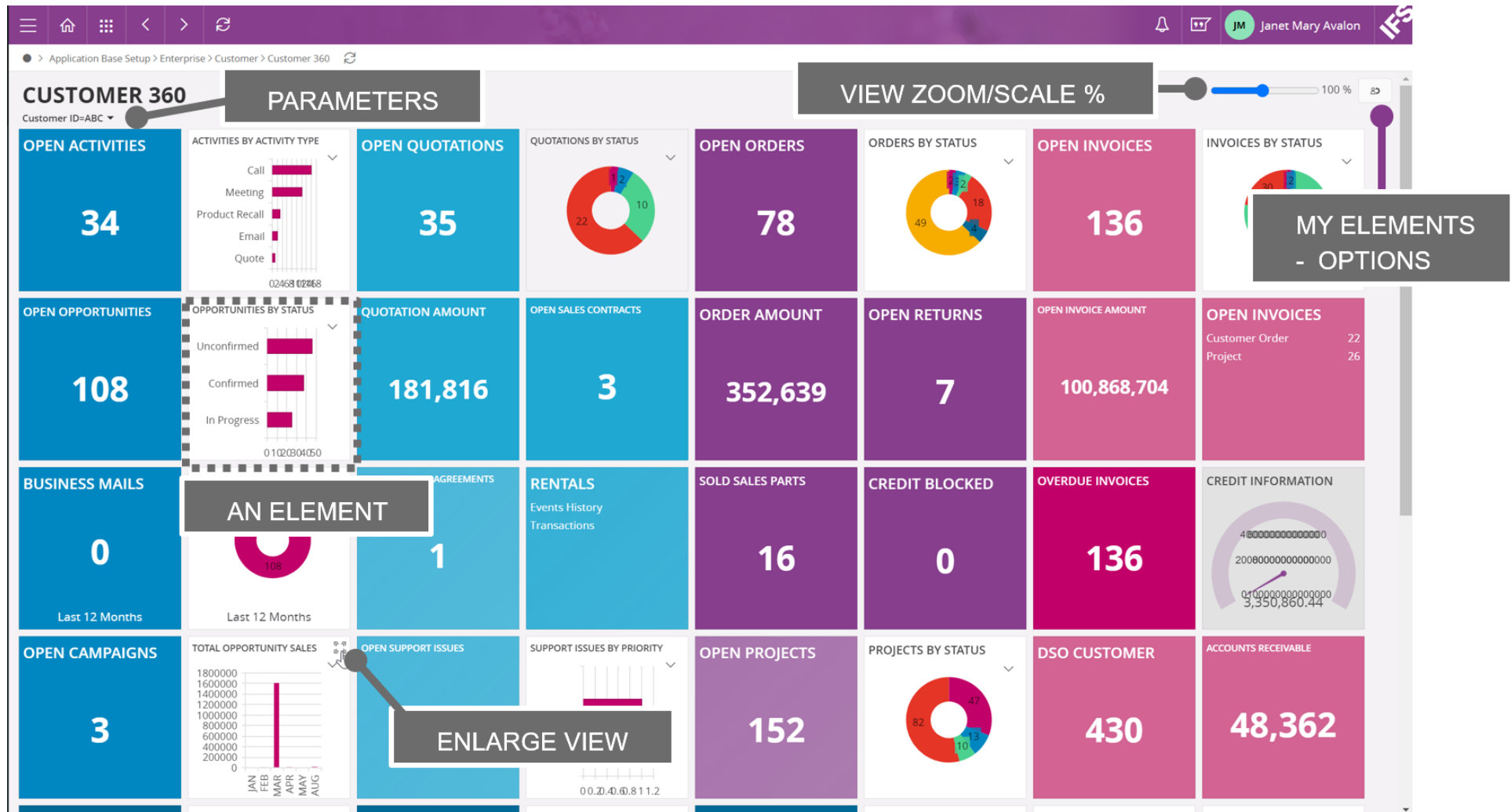
Charts have been embedded in various pages to provide a clear and immediate impression of information and details. Many will have drill down capabilities, dynamic tool tips, the ability to select specific attributes and the ability to focus on specific areas. *Note: some charts will only be displayed in Card views for a page.*

Look for the following Chart related features (not all features will be available in all charts/gantt):

AREA SELECTION	Select all the slices of a stack in one go before executing multi-select commands. Use Control (+click) for multi-selections in charts and Gantts
SUBSCRIPTIONS	Where subscribing to changes in one chart these will simultaneously reflect in another.
PAGING	Paging is applied in bar charts consuming more than 500 records. The users can load the next set of records by dragging the chart horizontally.
DYNAMIC TOOL TIPS	Contents of the tool tip may change depending on the selection made in the View Options.
SHOW/HIDE DEPENDENCY LINES IN A GANTT	User Setting to show/hide Gantt dependency lines. <i>Note: this option is ONLY available in Gantt that have dependency lines defined</i>
HIDE/SHOW LEGEND	Use the down-arrow to show chart legend. Pin to keep the legend displayed.
FULL SCREEN	Use 'boxed' icon to display as Full Screen or revert to normal view.
DISPLAY STACK DETAILS	Double-click on a chart stack to display the related details.

LOBBY

The IFS LOBBY is a powerful, visual display with drill through capabilities. Easy to configure, one-click to details.



Lobby

Lobby pages should be used as a Home or as starter pages for a user.

Visualise business information then take action as required and see the immediate effect.

Hint: If a Navigator entry is two-tone then the words go to a lobby and the > goes to a secondary navigator


Hint: Ideally add all required Lobbies as a Bookmark

LOBBY PAGE	Consists of a number of lobby elements.
ELEMENTS	These are specific displays within a lobby page. There are many different styles of element.
LOBBY OVERVIEW	Not all standard Lobbies are shown by default in the Navigator. Add the ones you need as a Bookmark. Note: users with relevant configuration/admin rights can access Solution Manager > Configurations > > Lobby > Lobby Overview page to view all available.
PAGE PARAMETERS	Lobby pages may have parameters established to determine specific information to view. <i>For example: Customer ID, Site, Project etc.</i> These parameters are part of the page design options and are displayed near to the Page Title.
LOBBY VIEW SCALE %	Use the scale (slider) bar to increase/decrease the lobby display size.
MY ELEMENTS – OPTIONS	Use the My Elements action to Add user specific elements to the lobby page. Also, to edit/delete and hide/show elements in the page.
ENLARGE VIEW	Where a chart/graph is used in an element move cursor over the element and an icon in the top right will appear (four corners). Use this to show the element in full display. Use the same icon (top right) to return to the original lobby page.

WORKING WITH DATES


DATE FIELD


Wanted Delivery Date/Time

14/02/2021, 00:00:00 

Sep	February 2021							Today	00:00	NOW
Oct	MO	TU	WE	TH	FR	SA	SU			
Nov	1	2	3	4	5	6	7			
Dec										

DATE FILTER

Wanted Delivery Date/Time ▼ More ▼  Favorite

E.g. 15/10/2020 

☒ Exact date

☐ Between two dates

☐ During

☐ In range

HANDY HINTS: DATE OPTIONS

Current date: click on [Today](#)


Specific Month: click on/scroll the MONTH view & select

Specific Year: click on the MONTH YEAR field scroll & select

Context Variables (i.e. yesterday, last month): in date filter select the During or In Range option. **Very useful for Saved Searches.**

VALIDITY PERIOD FIELDS

Validity Period

04/01/2021 - 21/01/2021 

Aug	December 2020							Today	January 2021							Today
Sep	MO	TU	WE	TH	FR	SA	SU		MO	TU	WE	TH	FR	SA	SU	
Oct																
Nov	January 2021															
Dec									4	5	6	7	8	9	10	
Jan									11	12	13	14	15	16	17	
Feb	4	5	6	7	8	9	10		18	19	20	21	22	23	24	
Mar	11	12	13	14	15	16	17		25	26	27	28	29	30	31	
Apr	18	19	20	21	22	23	24									
May								CLEAR								
Jun																


CLEAR SET

Working with dates


Also note the Handy Hints for Dates shown opposite.

OPEN	Click on the calendar action shown to the right of a date field. Calendar will appear. Select the month and date, and if appropriate time and verify with [SET].
DATE RANGE	Click on the calendar action shown to the right of the validity period field. Two calendars will appear. Select the month and date in each calendar and verify with [SET].
DATE FILTER	Select a date field in the page or column filter. <i>Note: select a column to filter & this will automatically appear in the filter area of the page.</i>
COLUMN DATE FIELD EXACT DATE	Select a specific (exact) date.
COLUMN DATE FIELD BETWEEN TWO DATES	Select a date from each of the Calendars displayed and then confirm with [SET] or using Today in the second calendar.
COLUMN DATE FIELD DURING	The During option will display a list of context variables to select from. These include: Today, Tomorrow, This Year, Last Month etc. Hint: Save as a Search and the context will remain – this can be very useful.
COLUMN DATE FIELD IN RANGE	The In Range option will display two list of context variables to select from. These include the ability to use – (minus) or + (plus) and then a number of days. Hint: Save as a Search and the context will remain – this can be very useful.


TOASTS



Sourcing Option must be set to DOP Order or Shop Order if Automatic Capability Check on inventory part is "Reserve and Allocate".



Expense sheet confirmed



Sales price group is changed. Sales part base prices, sales part rental base prices and price lists attached to the sales price group DPG1 will not be valid for the sales part 5003.

CURRENT STATUS

Planned



Released



Confirmed



Stopped



Closed



Toast – pop up messages

Will appear to confirm information, to warn a user or to show an error.

A Toast will appear in the bottom right hand side of a page.

Note: it will automatically disappear after about 4 seconds.

Hint: to keep the Toast message in view simply position your cursor over the message

Toasts are instant messages only.

Current Status

Where an object has a status, this will be shown in the top right-hand side of a page.

Status changes are colour coded and are also an indication how far through a process the object is.

SUBSCRIPTIONS and TASKS

Note: This is still an evolving area in IFS Cloud – the initial release will cover basic functionality.

Subscription

Notify Me

Notify Me Once ☐

Expiry Date
28/11/2020

Send Email ☐

Notify My Changes ☒

When selected fields are changed

Field

Selected

Track Name ☒

Notes

Hello!

Update

Unsubscribe

Cancel

Subscribe

Task

My Tasks

Customer Order - P10266_1

From: Janet Mary Avalon

Priority: Low

Received: 17/03/2015, 12:28

Due By: 17/11/2015, 10:00

Flag: ☒

Read: ☐

Type: Alert

Completed: ☐

Notes: Review order details for accuracy

Task

Complete Task

...

Annual Corporate Golf and Fami...

From: Janet Mary Avalon

Priority: High

Received: 17/03/2015, 12:28

Due By: 28/09/2015, 00:00

Flag: ☒

Read: ☐

Type: Alert

Completed: ☐

Notes: Remember to organise the event

Task

Complete Task

...

Task

Title

Check out the order details and verify against the latest price list

Priority: Normal

Flag: Blue Flag

Due Date: 25/12/2020, 00:00

Notes: secondary validation of pricing details

OK

Cancel

Subscriptions and Tasks

What is a subscription?

The ability to subscribe (get notice of) to specific record changes and receive a notification (message or email) when certain aspects are changed. Free format notes can be added.

A subscription expiry date can be set. Users subscriptions can be seen in the Notification panel.

Please see the Notifications section of this guide.

What is a task?

A general action (to-do/reminder) with a priority, visual flag, date to be completed by and notes. Tasks are informal reminders to a user. They may, or may not, be linked to specific records.

Limitations in the initial release of IFS Cloud include:

Tasks cannot be shared with other users or re-assigned.

NOTIFICATION PANEL

The screenshot shows the IFS Notification Panel interface. On the left is a sidebar with a list of notification types, each with a checked checkbox: Tasks, Events, Subscriptions, Subscription Expiry, Reports, and Background Jobs. Below this list is a gear icon for configuration. The main panel has a purple header bar containing a bell icon (highlighted with a dashed box), a chat icon, a user profile for Janet Mary Avalon (JM), and the IFS logo. Below the header, the panel displays 'Older notifications' and a message: 'No new notifications from the past 2 days. 15:38:26.' A settings gear icon is at the bottom left of the panel, and a vertical menu icon is at the bottom right. A callout box points to the settings gear, stating: 'CONFIGURE THE NOTIFICATIONS THAT WILL BE SHOWN TO THE USER'. Another callout box points to the vertical menu icon, stating: 'DIRECT ACCESS TO SPECIFIC PAGES FOR ACTIVE DETAILS'. This menu is open, showing links to: Notifications, Tasks, Scheduled Reports, Report Archive, and Subscriptions.

- ☒ Tasks
- ☒ Events
- ☒ Subscriptions
- ☒ Subscription Expiry
- ☒ Reports
- ☒ Background Jobs

Older notifications

No new notifications from the past 2 days.
15:38:26.

CONFIGURE THE NOTIFICATIONS THAT WILL BE SHOWN TO THE USER

DIRECT ACCESS TO SPECIFIC PAGES FOR ACTIVE DETAILS

- Notifications
- Tasks
- Scheduled Reports
- Report Archive
- Subscriptions

Notifications

The Notification panel shows live and interactive messages for the user and is accessed from the Application Menu bar.

Use the [3x dots] for direct access to message overview pages – Notifications, Tasks, Scheduled Reports, Report Archive and Subscriptions.

Use the cog to configure the contents of this view and determine which notifications are visible to the user.

TASK	A general action (to-do/reminder) with a priority, visual flag, date to be completed by and notes. informal reminders to a user. They may, or may not, be linked to specific records.
EVENTS	Pro-active and automated messaging system.
SUBSCRIPTIONS and SUBSCRIPTION EXPIRY	See the subscription and task section of this guide.
REPORTS	
BACKGROUND JOBS	Automated jobs that can be set up and run based on a schedule.

IN-FIELD CALCULATIONS

Quantity

= 12

Quantity

= 20

CHARACTERS LEFT TO USE IN A FIELD

Scrapping Causes

+

🗑

📄

Save

Cancel New

(1) ✓	Scrapping Cause ID	Scrapping Cause Description
<input checked="" type="checkbox"/>	SCRAP	
<input type="checkbox"/>	5/8	

Ship via Codes

+

🗑

📄

Save

Cancel New

(1) ✓	Ship Via Code	Ship Via Description
<input checked="" type="checkbox"/>		
<input type="checkbox"/>	0/3	

In-field Calculations

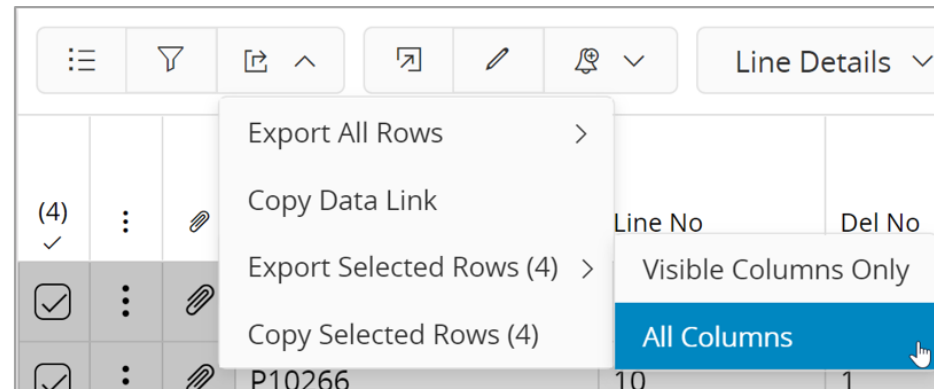
In quantity fields a simple calculation can be made directly in the field itself.

For example: $4*3 = 12$ $13+7 = 20$

Characters left to use in a field

The number of characters left to use in a field will be displayed as the user starts to reach the field limitations.

EXPORT OR COPY/PASTE SELECTED RECORDS




File name:

Save as type:

Order No							
	A	B	C	D	E	F	G
1	Order No	Line No	Del No	Rental	Customer	Site	Order Stat
2	P10266	1	1	No	ABC - ABC Corporation	501	Planned
3	P10266	10	1	No	ABC - ABC Corporation	501	Planned
4	P10266	11	1	No	ABC - ABC Corporation	501	Planned
5	P10266	12	1	No	ABC - ABC Corporation	501	Planned
6							

Export or Copy/Paste selected records

EXPORT OR COPY/PASTE SELECTED RECORDS OPTIONS:	
Export all rows >	Visible columns only or all columns <i>Note: this exports <u>all</u> the filtered rows regardless if they are in view on the page.</i>
Copy Data Link	Used for integrations
Export Selected Rows (X) >	Visible columns only or all columns Only active for the selected rows
Copy Selected Rows (X) >	Visible columns only or all columns Only active for the selected rows

The Export option will create an XLS file with the name format of: List/PageName_yyyymmdd_nnnnnn.xlsx

NOTE - Limitations in the initial release of IFS Cloud:

There is no paste option back into Aurena itself. Consider using Duplicate to copy records.

NEW – EDIT – CANCEL - DELETE



NEW



EDIT



CANCEL




DELETE

Planned Start

01/10/2020, 00:00

✓ ✗

COLOUR HIGHLIGHT OR SYMBOL INDICATES
CHANGES MADE BUT NOT SAVED

<div> Save Cancel Edit</div>				
Line No	Del No	Sales Part No	Sales Part Description	Sales Qty
1	1	5004	column 33	33
2	1	5003	gear lever SHOP 2order CTP	1
3	1	5002	relay shaft 2	12

! Delete Record

Please confirm that you wish to delete this record.

Delete

Cancel

! Unsaved Changes

You have some unsaved changes. Do you want to save the changes?

Yes

No

Cancel

! Cancel New

Please confirm that you wish to discard this.

Discard

Keep it

General Comments - New, Edit, Cancel and Delete

Options displayed will be dependent upon the business rules for a page and the page style – not all options might be available.

NEW	Create a new entry. Mandatory fields will be highlighted. Use tab to move between fields. <i>Note: the SAVE option will only appear once all required fields are complete.</i>
EDIT	Multi-line and multi-record Edit/changing in one action is standard. Change current records - Edit <u>will highlight all lines</u> ready for changes. Click directly or Tab into a field to make changes. A coloured highlight on the line indicates changes have been made but not yet Saved. Make all the changes required then SAVE. <i>Note: SAVE will only appear when relevant.</i> <i>Note: unsaved changes will be indicated to the User before they leave a page.</i> <i>Note: the use of EDIT will cause page buttons to be hidden whilst Edit is active</i> <i>Note: certain fields will have a X/V shown against the field itself to Save or cancel changes.</i>
CANCEL	Option will appear alongside Save once Edit has been enabled.
SAVE	Note: Dependant on specific pages and fields Save might be actioned by the use of: common action/Icon, confirming a X/V against the field , tabbing out of a field, using Enter or clicking outside of the field.
DELETE	Permanently remove an entry – a confirmation message will be displayed which will need to be confirmed.

ATTACHMENTS

Object Connections

[Refresh Cache](#)
[Background Jobs](#)
[Object Connection Default Definitions](#)

☰

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📄

▼

New

✓	:	Logical Unit	Description	Component	View Name	Package Name	Met... Name	Service List	Default Definitions
<input type="checkbox"/>	:	SupplierBlanket	Supplier Agreement	PURCH	SUPPLIER_BLANKET	SUPPLIER_BLANKET_API		ApprovalRouting, ChangeObjectConnection, DocReferenceObject	Yes
<input type="checkbox"/>	:	SupplierBlanketLin	Supplier Agreement L	PURCH	SUPPLIER_BLANKET_LIN	SUPPLIER_BLANKET_LINE		DocReferenceObject	Yes
<input type="checkbox"/>	:	SupplierInfo	Supplier Info	ENTERP	SUPPLIER_INFO				
<input type="checkbox"/>	:	SupplierInfo	Supplier Info	ENTERP	SUPPLIER_INFO				
<input type="checkbox"/>	:	SupplierInfo	Supplier Info	ENTERP	SUPPLIER_INFO				
<input type="checkbox"/>	:	SupplierInfo	Supplier Info	ENTERP	SUPPLIER_INFO				
<input type="checkbox"/>	:	SupplierInfo	Supplier Info	ENTERP	SUPPLIER_INFO				

THE SERVICE LIST DISPLAYS THE ACTIVE ATTACHMENTS FOR AN OBJECT

HIGHLIGHT LINE AND USE EDIT TO ACTIVATE THE EDIT OBJECT CONNECTION PAGE

USE A COMMON ACTION OR CLICK IN THE ATTACHMENTS PANEL TO VIEW ACTIVE CONNECTIONS

Attachments

[APPROVAL PROCESS](#)
[DOCUMENTS](#)
[DOCUMENT REQUIREMENTS](#)
[CHANGE ACTION](#)
[CHANGE ACTION](#)

[Attach Existing](#)
[Create New](#)
[Create From Template](#)
[Document Requirements](#)

×

Edit Object Connection

Connection

Logical Unit

SupplierBlanket

Description

Supplier Agreement

Available Services

Find

AuditObjectConnection

CapaObjectConnection

CcCaseObjectConnection

DocRequirementObject

EcoActionObjectConn

Connected Services

ChangeObjectConnection

ApprovalRouting

DocReferenceObject

Attachments – general overview

Attachments are activated in IFS Solution Manager – Object Connections.

These are not typically activated by an end-user, but this is rather a system manager role.

Attachments provide additional/related information against an object.

Examples of attachments include:

Approval Routing	Audit Management	CAPA (quality)
Case (call centre)	Change Request	Engineering Change Order
Incident Report	Map Position	Media Library
NATO reference	Non-Conformance Request	Risk
Technical (characteristics)	Document Requirements	Document
Risk Assessment		

Please see on-line for the complete Service List that is currently available.

Use either the Attachment Common Action (paperclip) or Attachment panel to view.

Note: The Attachment details today do not immediately display the number of attachments by default.

APPENDIX:

Keyboard Shortcuts:

User options > (i) Shortcuts Settings will display the currently available Keyboard Shortcuts.

Note: these may change by release/update so check them out.

Keyboard shortcuts can help to use the system more quickly and efficiently.

Help – page and fields:

On-line documentation is available from the User Menu and Options in the Application Menu and User bar at the top of each page. Access to – business models, functional area models, topics in IFS Cloud, technical and general use is available (but this may depend upon a user's access permissions).

Field descriptions can be activated from here. This will show (i) indicator for each field – simply click this to show the relevant description.

Aurena BOT - general

IFS Aurena Bot is a chatbot and it can help perform a range of relatively simple but effective tasks. It leverages artificial intelligence technologies like Natural Language Processing (Microsoft LUIS) to figure out the intents of user inputs. As it is used more, it will learn to classify intents better.

IFS Aurena Bot is available through multiple channels on a variety of devices. Depending on the customers' preferences, it can be made available through corporate channels such as Microsoft Teams, Slack or more typical consumer channels such as Facebook Messenger, regular Skype and of course inside the IFS Aurena itself.

The capability of the channel determines the range of features available in the IFS Aurena Bot. For example, some channels support text only, while others support advanced mark-up including images and multiple-choice buttons. This has an impact on the ability to show advanced visuals such as charts or good-looking tables. Another difference often seen between channels is the speech-to-text capability, enabling that feature for the IFS Aurena Bot or not.

IFS Aurena Bot is designed based on multi-tenant cloud application architecture, which means only a single bot instance is available for all the IFS customers who are on cloud, on-prem.

IFS Aurena BOT is evolving functionality.

Please note Aurena User Guide concept and limitations:

This guide has been designed to be a non-technical view of the main user experience aspects of IFS Cloud/Aurena.

It is for typical end users, presales and consultants and includes hints and tips to make best use of the user experience.

It does NOT cover – the IFS Mobile Framework, IFS Configuration aspects, the use of Contexts, using interactive maps in the application.

This guide version is based on IFS Cloud Early Access.

END OF THE AURENA USER EXPERIENCE GUIDE