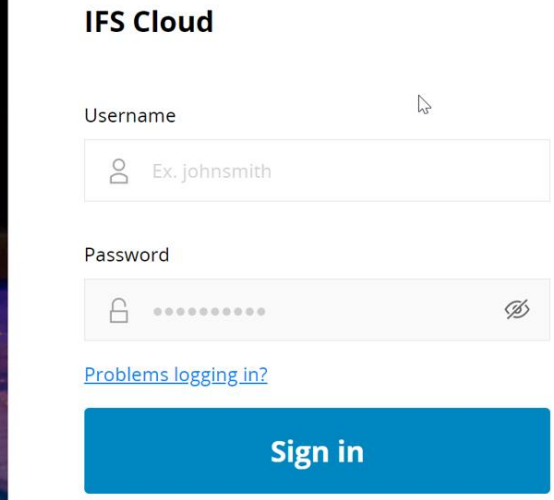
IFS CLOUD -

AURENA USER GUIDE



December 2020 – Early Access

AURENA USER GUIDE

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

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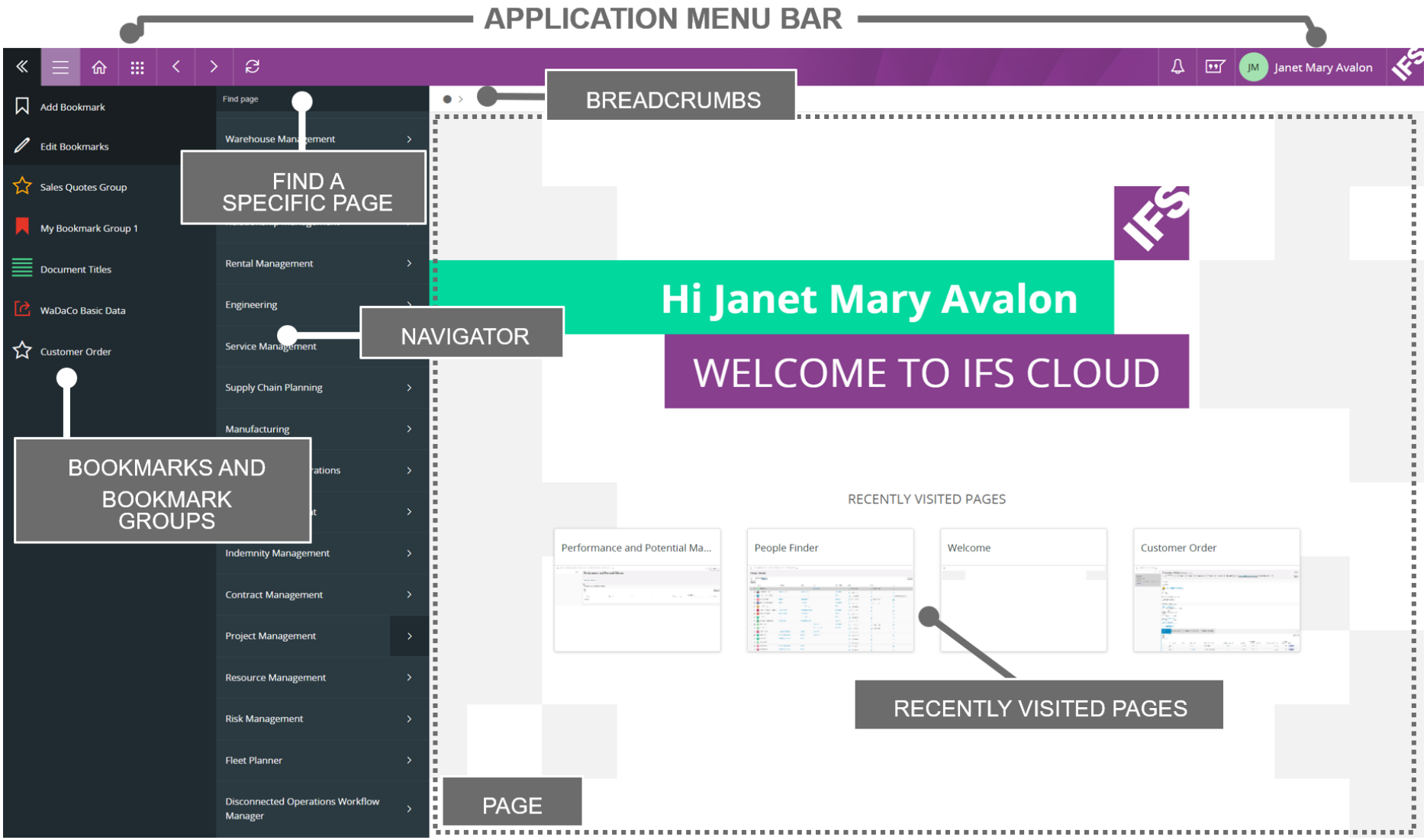
GENERAL LAYOUT

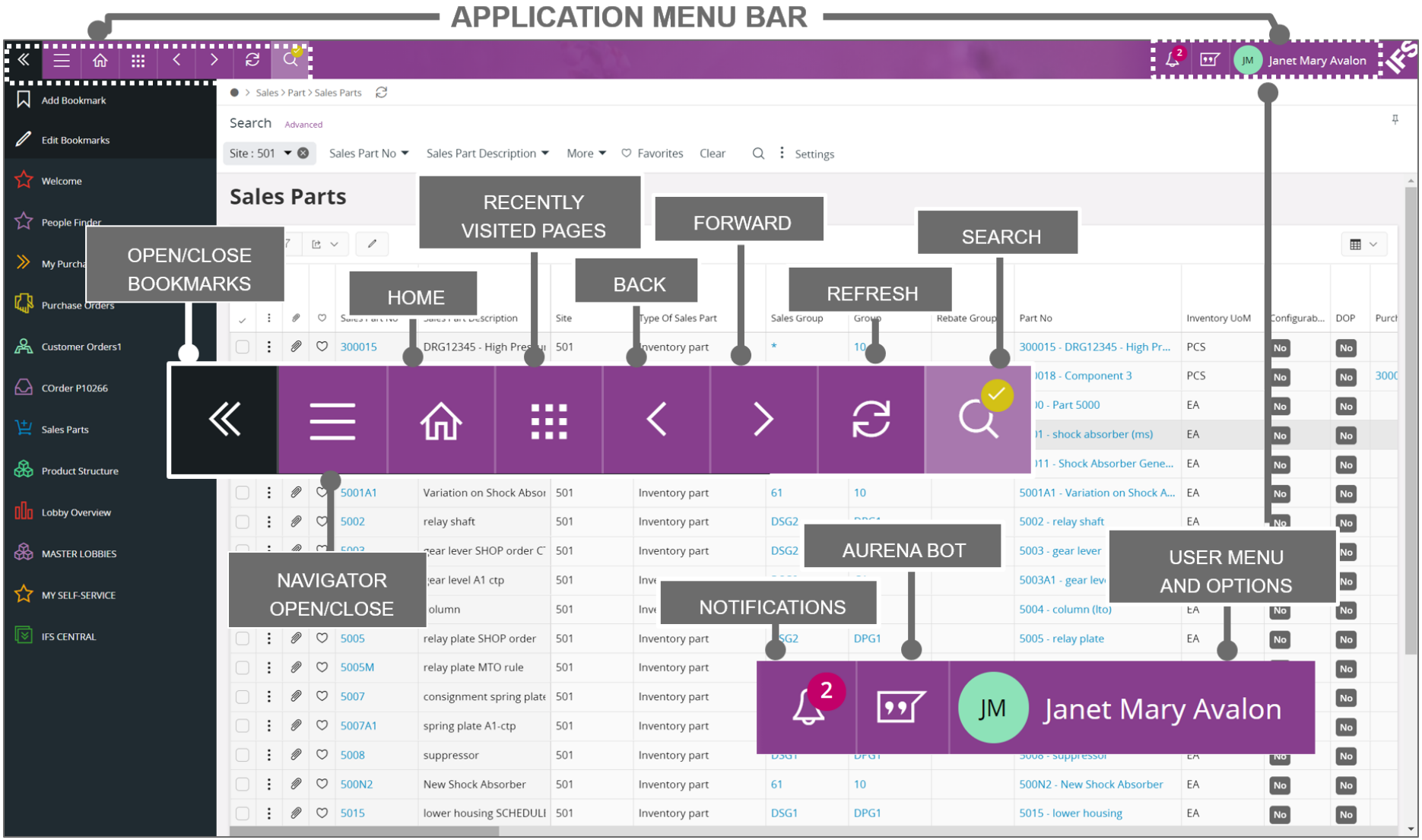


General Layout

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

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

APPLICATION MENU BAR

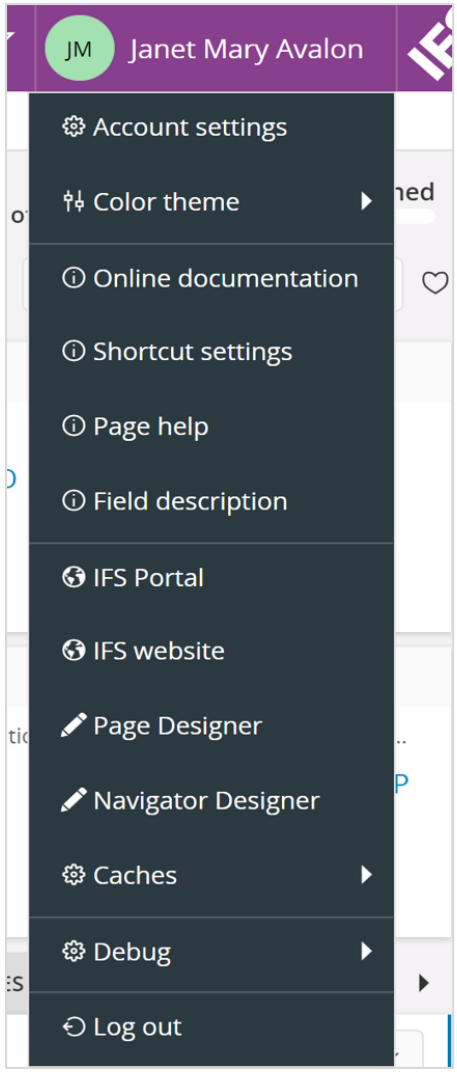


Application Menu Bar

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. *Hint: Set up all your regularly used pages as Bookmarks*.
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. *Note: a gold tick means an active search is in place.*
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



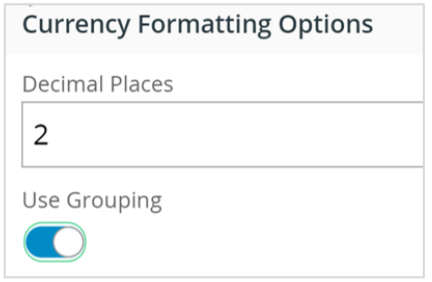
USER MENU and OPTIONS

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.



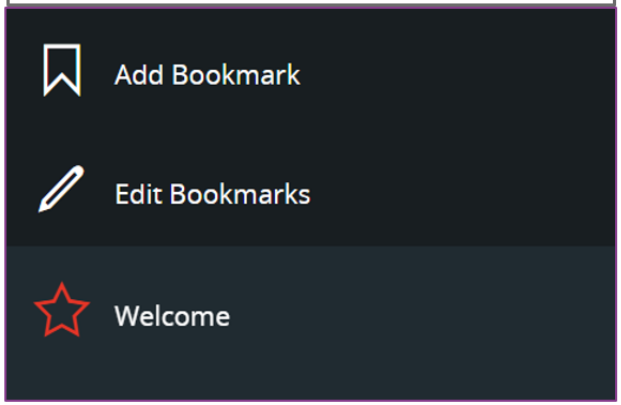
User Menu and Options

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

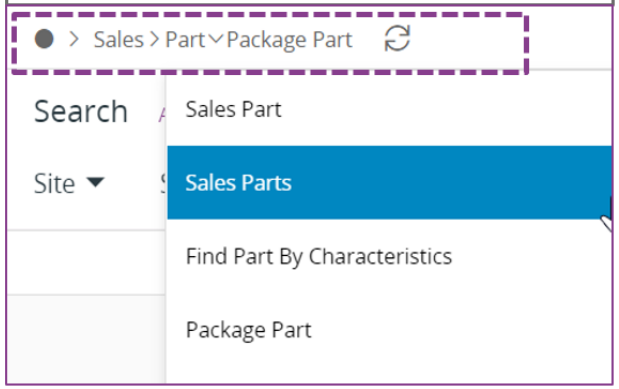
ACCOUNT SETTINGS	General User and Personal Information. i.e. change language, currency format and if currency grouping is used (show currency commas). *Hint: find the release/update you are using at the bottom left of this page.*
COLOR THEME	Select the User theme.
ONLINE DOCUMENTATION	Access to user documentation – Business Models, Functional Models, Topics of key features, Technical and general Client use.
SHORTCUT SETTNGS	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

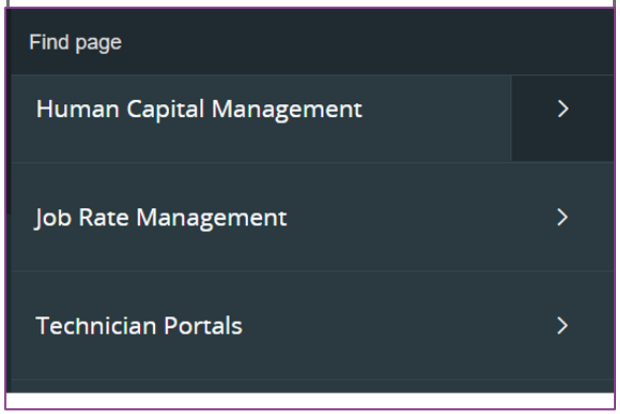
BOOKMARKS & BOOKMARK GROUPS



BREADCRUMBS

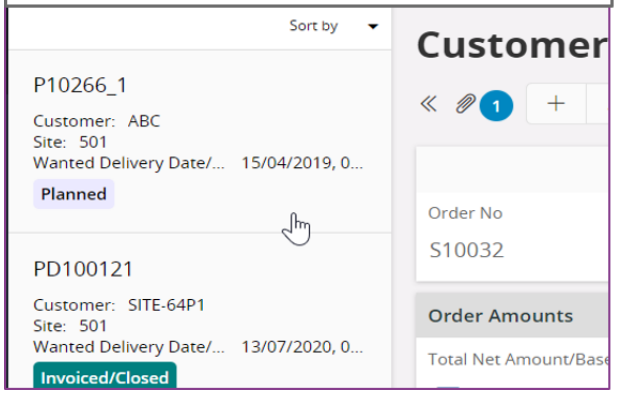


NAVIGATOR

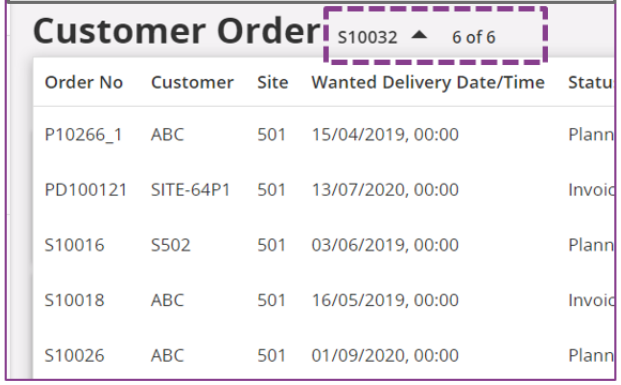


RECORD SELECTOR

filtered records in detailed page

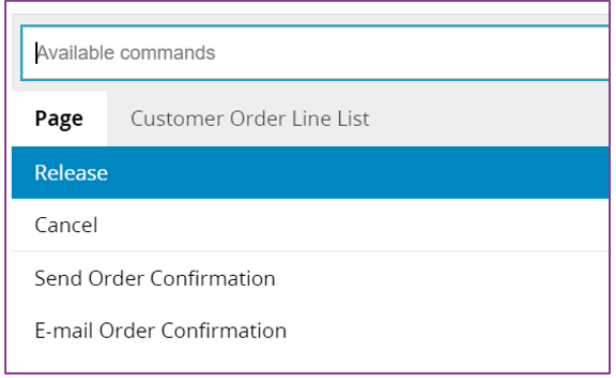


COMPACT RECORD SELECTOR

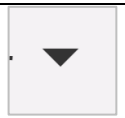


COMMAND MENU

use [.] period in a page



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. *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.*
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. *Hint: Set up all your regularly used pages as Bookmarks*. ***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. *Note: not as efficient as the Record Selector.*
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

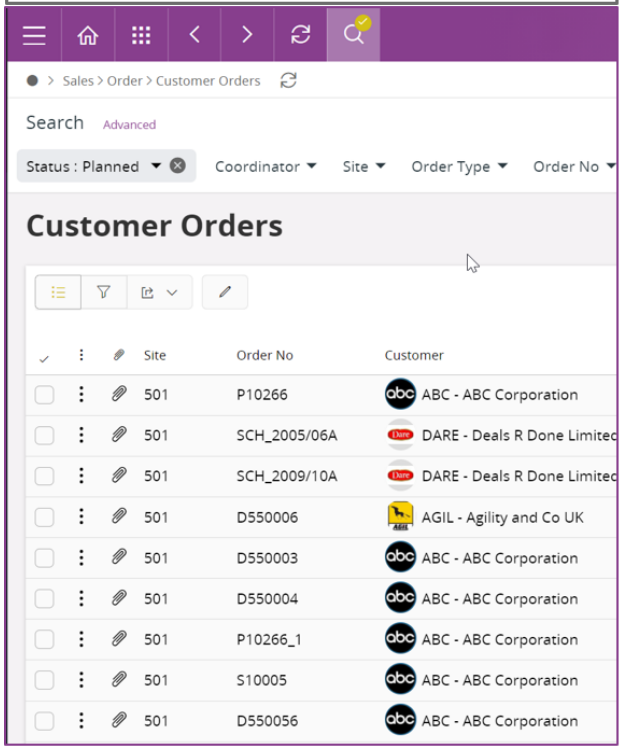
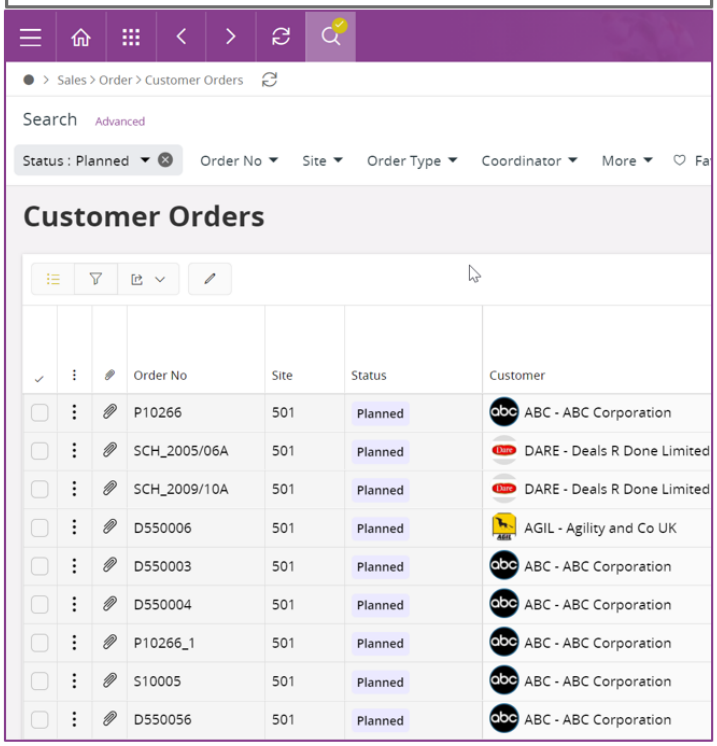
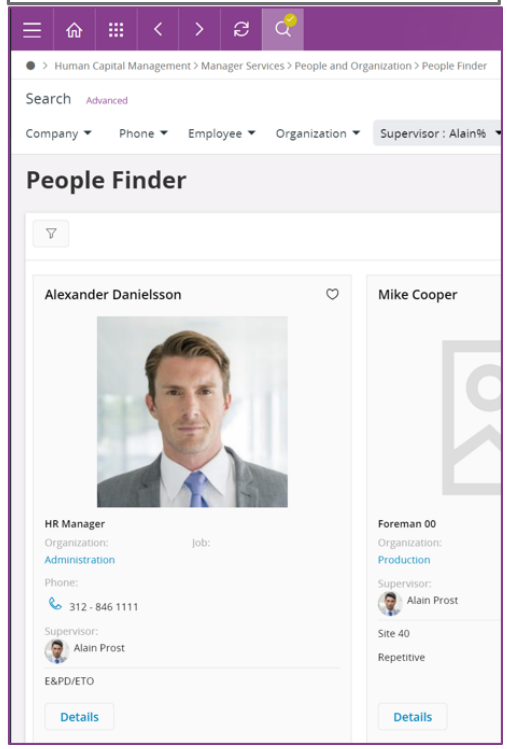


TABLE VIEW
select/move columns



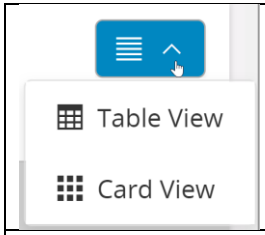
CARD VIEW
single record



List - Table - Card - Box Matrix

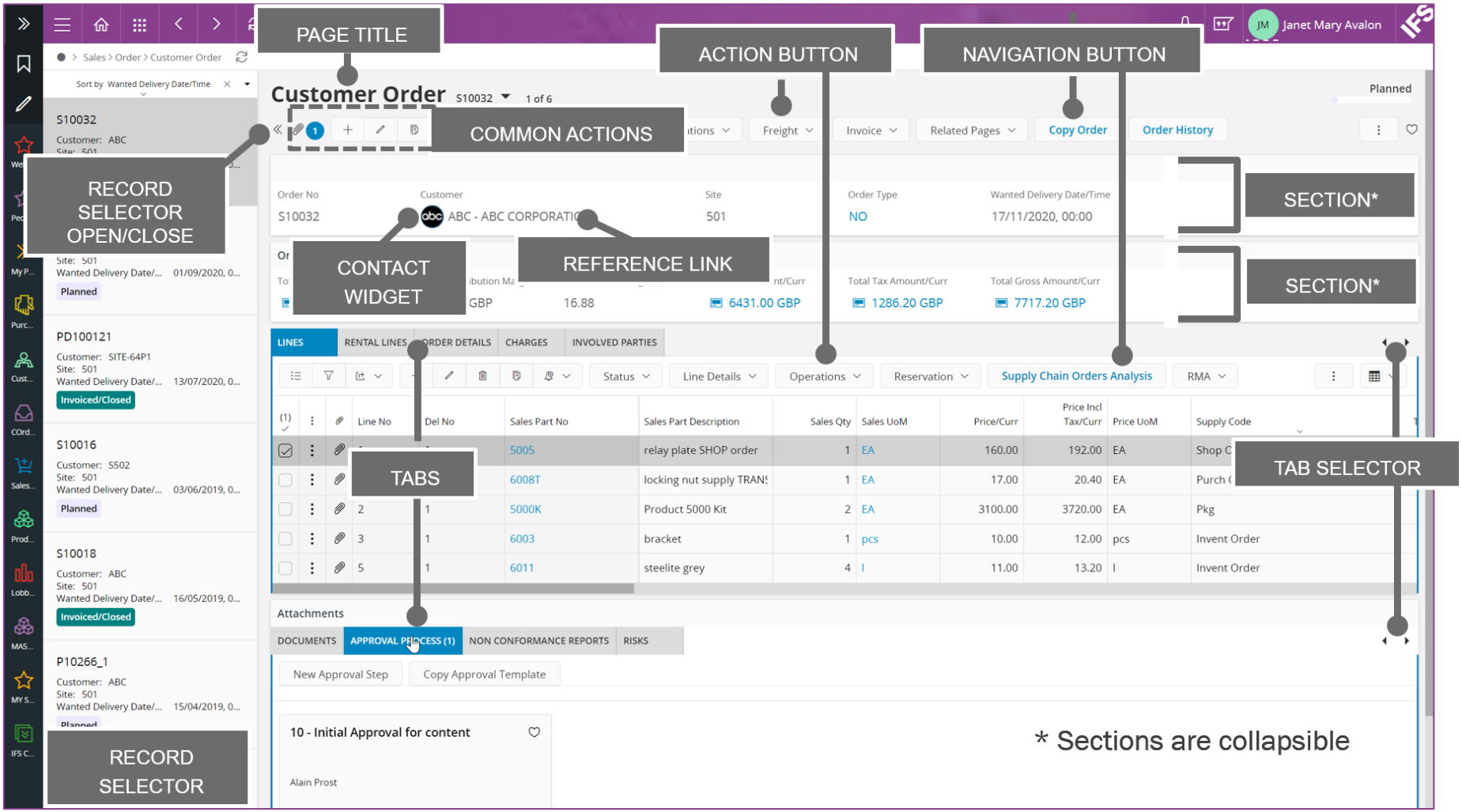
Please Note:

- 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.

	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. This example on the left shows List (current view), Table and Card view options. Box Matrix view will also be available on some pages.
LIST	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. *Note: displays prioritised fields set by Design (but can be changed in the view settings)*
TABLE	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. *Note: user can determine the fields and sequence in view settings.*
CARD	A visual view of information displayed in Card format. Options to drill to details.
BOX MATRIX	This is a grid/boxed display that compares information related to the axis details. *Example page where this is used – Design FMEA Analysis.*

WORKING WITH PAGES – SPECIFIC RECORD

PAGE AREAS – SPECIFIC RECORD

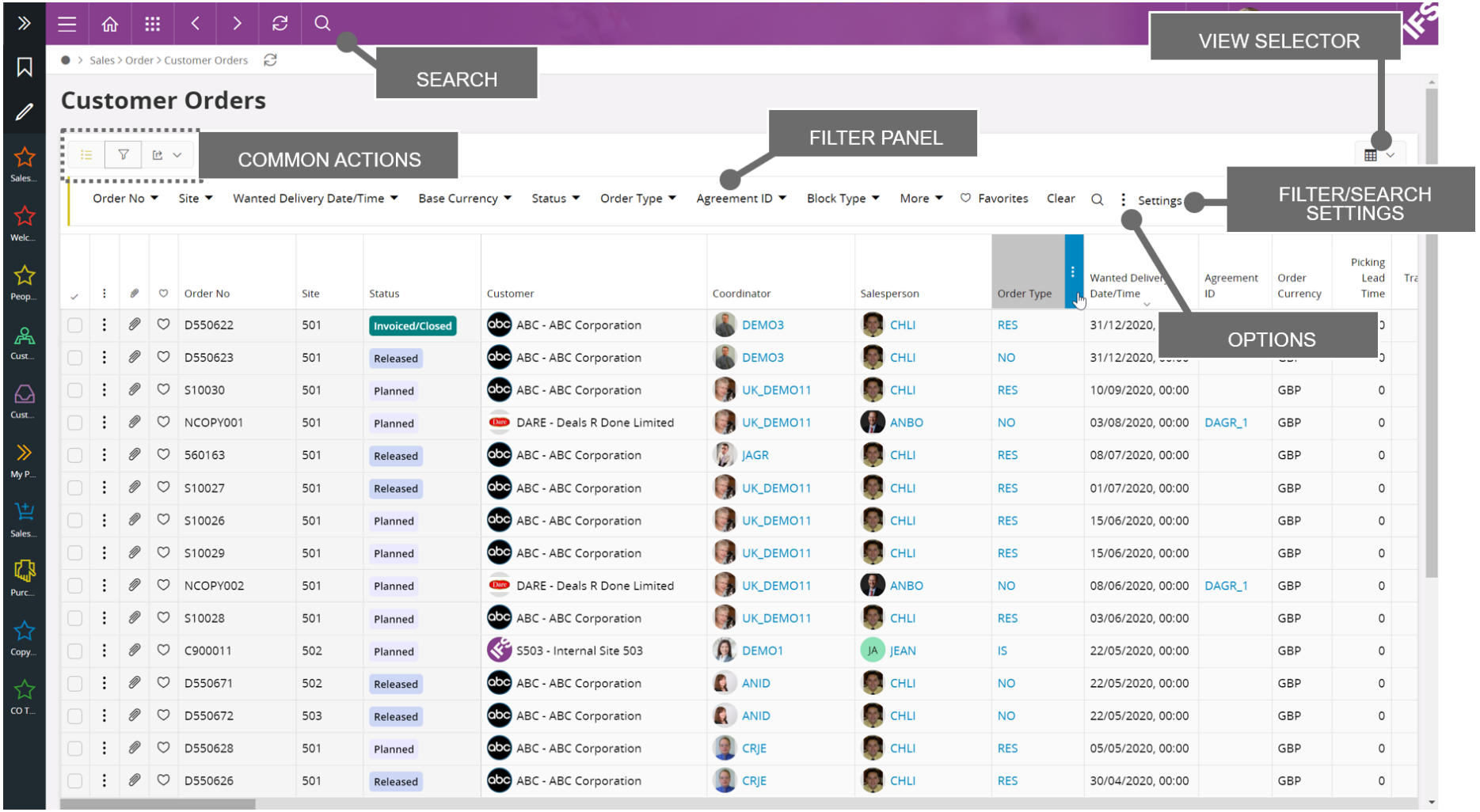


Working with Pages – specific record

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. *Hint: start to type to limit the options displayed.* 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. *Note: there are different types of widget i.e. people, suppliers, customers etc.*
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. *Note: parallel sections need to be collapsed/opened separately.* *Hint: collapsing a section that is not regularly used saves display space.*

WORKING WITH PAGES – TABLE/LIST (1)

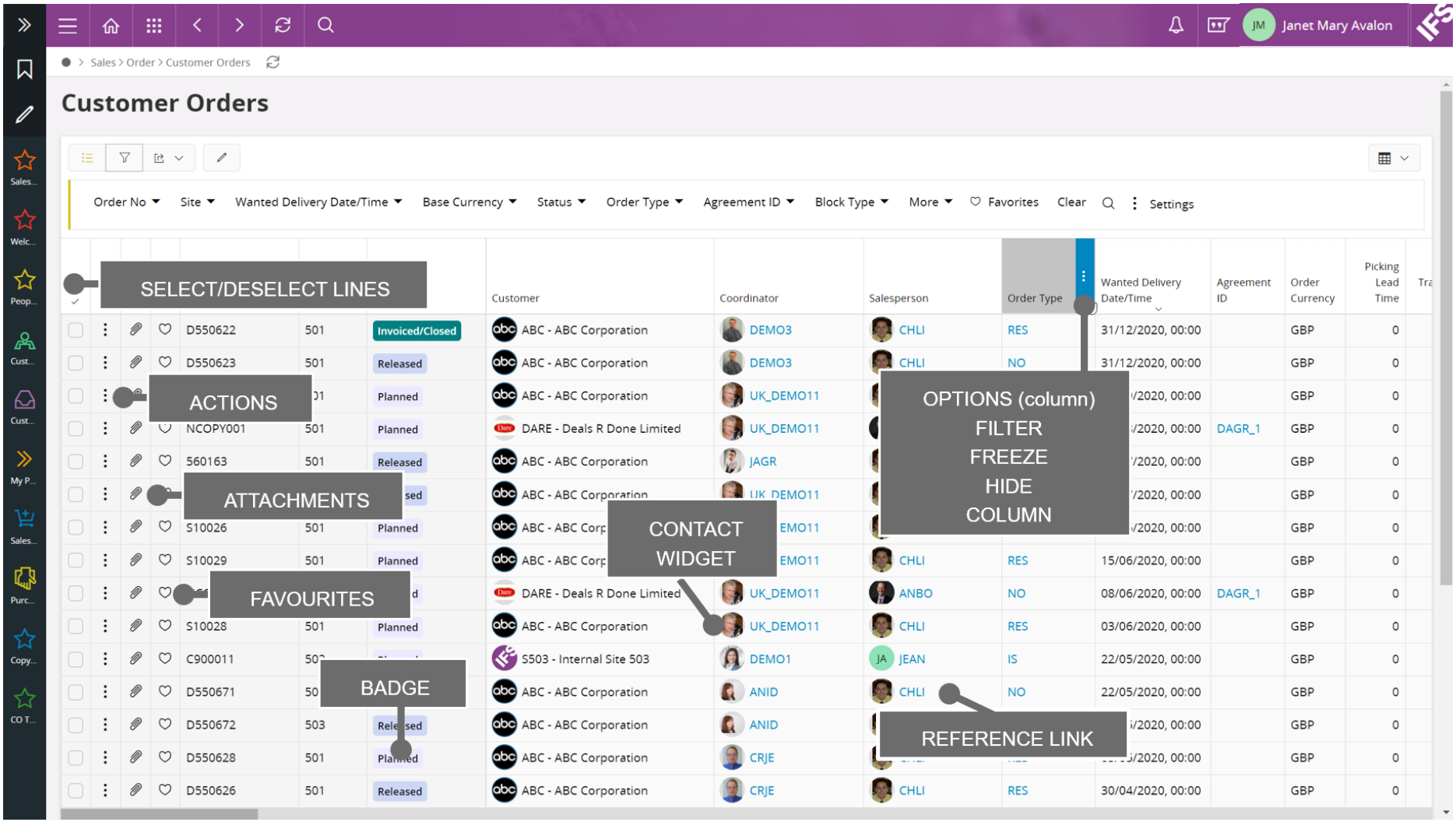


Order No	Site	Status	Customer	Coordinator	Salesperson	Order Type	Wanted Deliver Date/Time	Agreement ID	Order Currency	Picking Lead Time
D550622	501	Invoiced/Closed	ABC - ABC Corporation	DEMO3	CHLI	RES	31/12/2020,			
D550623	501	Released	ABC - ABC Corporation	DEMO3	CHLI	NO	31/12/2020,			
S10030	501	Planned	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	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. *Important note: filter results will depend on the overall page search results.*
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)

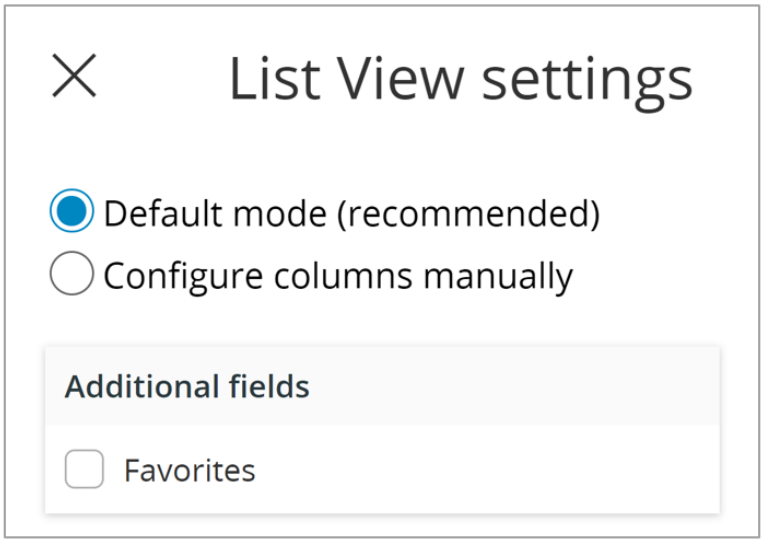


Working with Pages – Table/List (2)

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

CHOOSE COLUMNS TO BE SHOWN

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



List View – is the default view

Prioritised columns that flex to the device being used.

No grid lines and no scrolling.

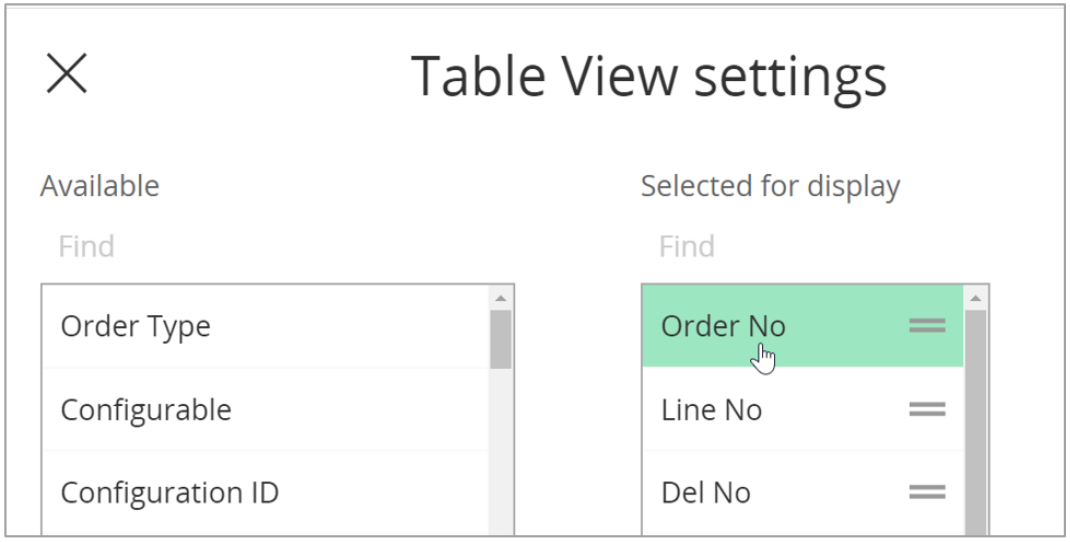


Table View - shows grid lines and will enable scrolling across columns.

Choose columns to be shown in a view

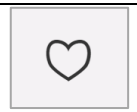
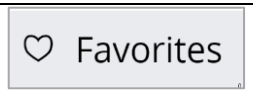
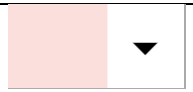
AVAILABLE	Available columns are displayed on the left in Table View settings. Use Find (type ahead to restrict values) to find specific columns for display.
SELECTED FOR DISPLAY	Displayed columns and their order are shown in the right-hand table
MOVE COLUMNS **Available <> Display**	Use Shift key +click 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.

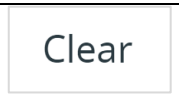
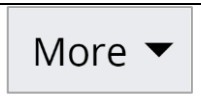
*Hint - **Display more or less columns in a page:** use Control and mouse wheel to Zoom in/out.*
This will cause more/less columns and buttons to dynamically appear.

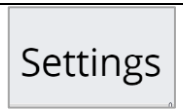
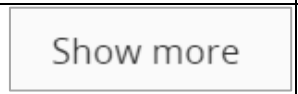
COMMON ACTIONS

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. *Note: in the current release this is not active in all pages*
EDIT		Appears when a line(s) have been selected and edit is possible.

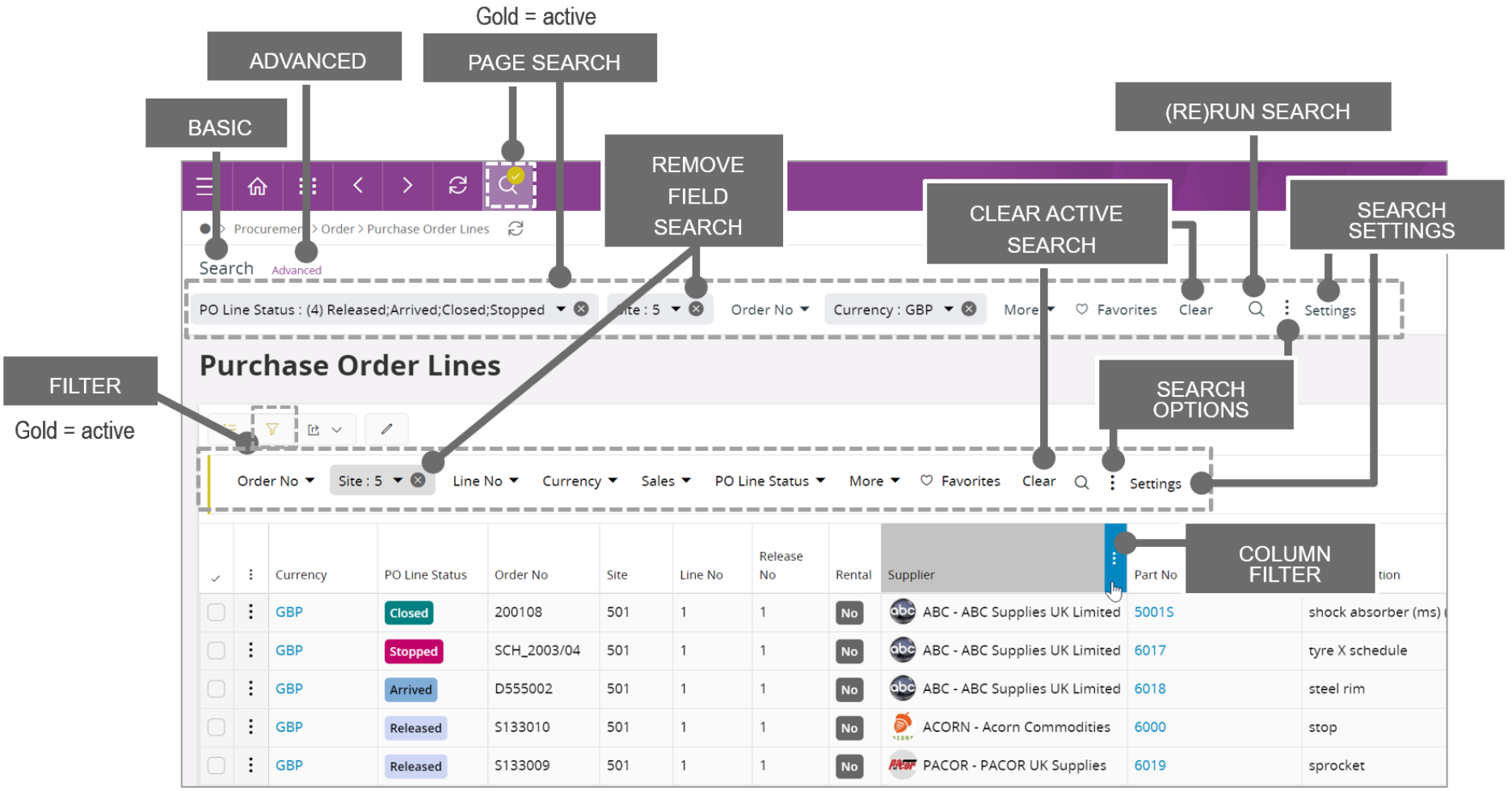
EXPORT or COPY/PASTE record(s)		Options can be: Export all (visible or all columns), Copy Data Link, Export Selected Rows (visible or all columns), Copy Selected Rows. Please see details later in this guide.
FAVOURITES		Click to mark a record as a Favourite. Filled = selected. Manually set and unset by the user. *Note: can be used to restrict some filtered lists to only show favourites.*
FILTER		Open/activate the filter selection panel. Please see search/filter section in this guide. *Note: not shown on a single record page.*
FOCUS ON FAVORITES		In the search/filter panel. Active if a filled heart is displayed. *Note: Favourites are ad-hoc record selections controlled by the user.*
GO TO details		Appears **only when lines have been selected.** *Note: In some pages a new **Button** will appear to use instead of the Go To details action.*
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. *Note: hover over action to display notes or click to open side page.*
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 *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.*
PIN		Use to pin (set in view) information. Example: contact widget or reference link. *Note: need to unpin to remove display, this can restrict the view of other fields.*
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. *Note: pinning multiple preview cards may restrict the view of other fields.*
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. *BEWARE – The 'reset' option removes all fields in view.*
SEARCH/FILTER options		Options to save, previous, edit searches. This option at the top of a page includes the ability to Copy Link.

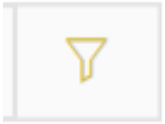
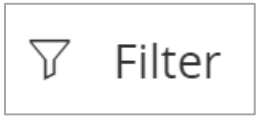
SEARCH/FILTER settings		Opens settings to determine the start-up behaviour of the specific page. Please see details later in this guide.
SELECT – DESELECT lines		Tick column header & all lines will be ticked & nos of lines displayed will be shown. *Note: initially 24 lines max will be shown or as determined by search/filter.*
SELECT VIEW		Shows the available views for a page - change the page view here. This will be remembered by user. *Note: the default view is usually a List*
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. *Note: there are different types of widget i.e. people, suppliers, customers etc.*

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

SEARCH AND FILTER – INTRODUCTION



Search and Filter Introduction:

	There are 3 levels of search/filter: (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.**
	(2) from a **List** (filter). **A gold filter means an ACTIVE filter is in place** (based on the active top search).
	(3) by **Column** within a list - use the three dots to select filter. *Note: using a column filter will automatically add the field to the Filter panel.*

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. *Note: only one new filter field can be added at a time using [More].*
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	To specifically match the case of the search/filter use the [Aa] action. ***Note: toggle to change - active when square surround appears.*** *Hint: check this setting if the results are not as expected.*
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	*Note: data type dependant fields will behave differently for search and filter* *Example: status fields in top search may show a list of entries – tick to select values.* *Status fields in filter panel may allow you to key in specific entries.*

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

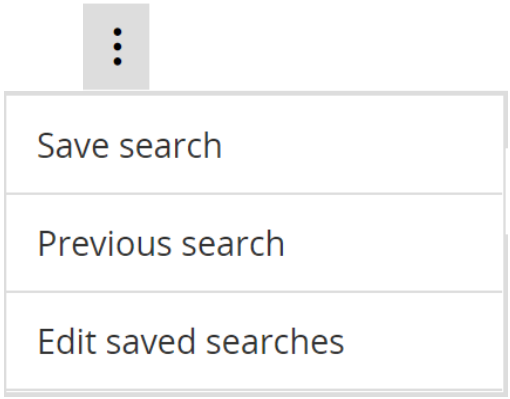
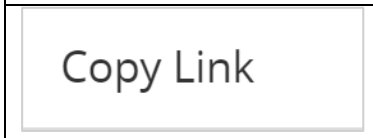
General Search and Filter – syntax values

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 <u>both</u> be active - the filter will be based on the results of the search.*

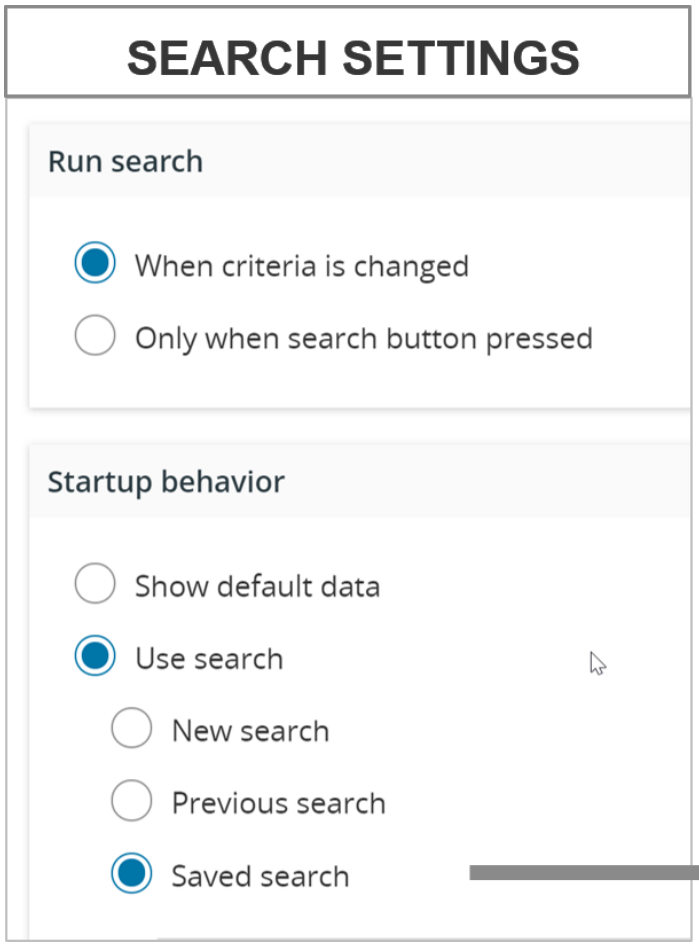
Save a search

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

Be Aware: *A search and a filter can <u>both be active</u>. 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



Accessed from the page search or filter panels settings action.

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

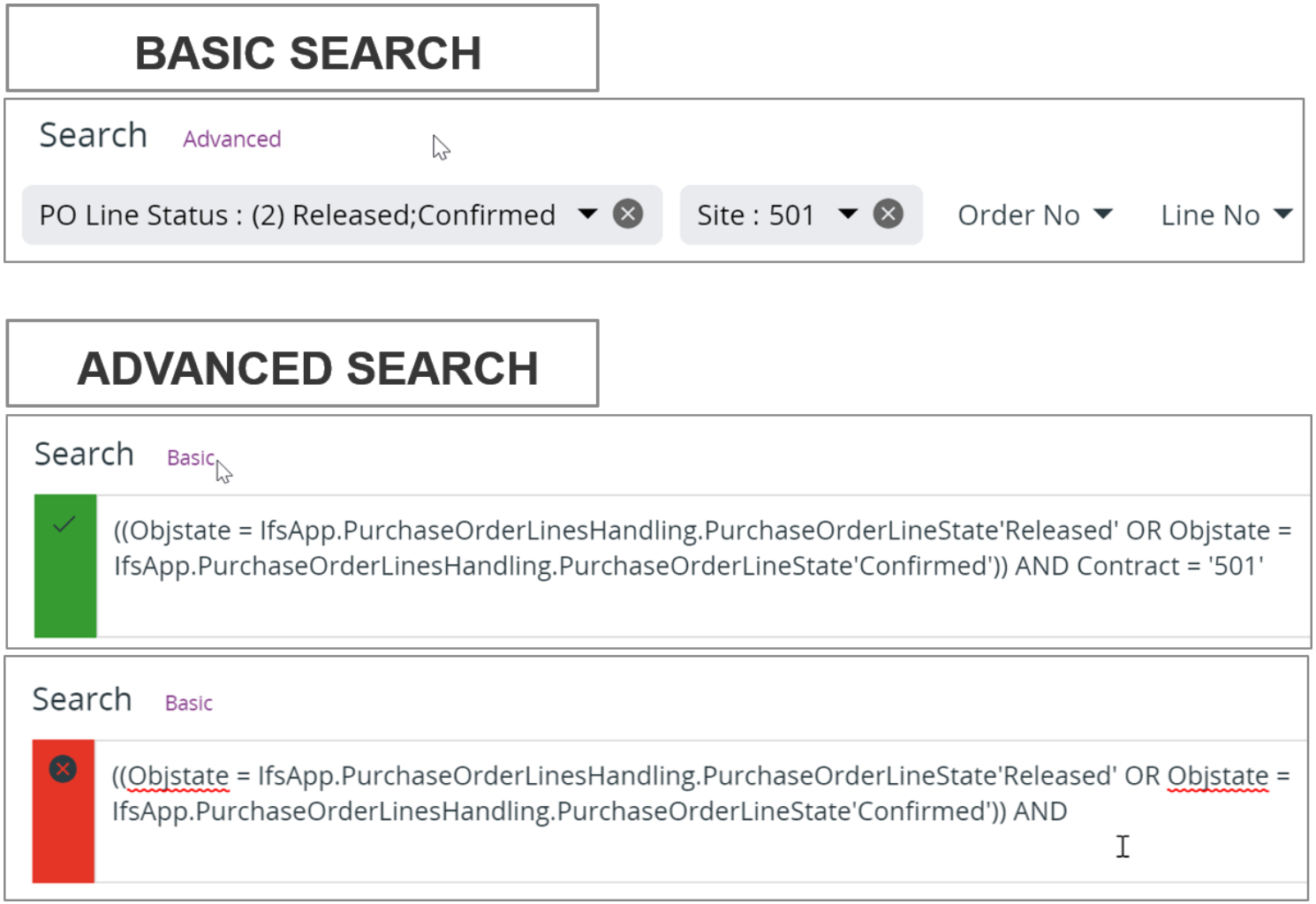
Saved Search notes are displayed for information.

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



Advanced search – high level comments

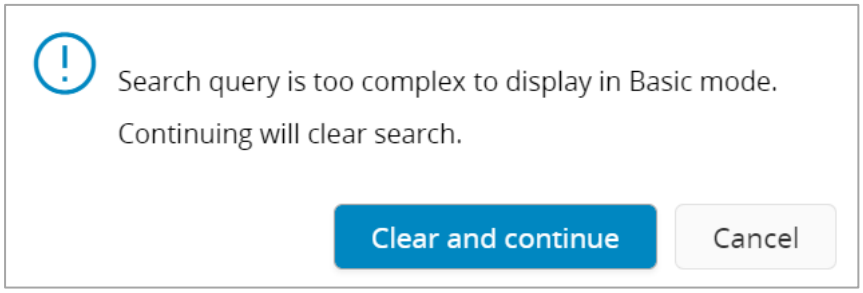
Advanced Search is only available from the Application Bar

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.

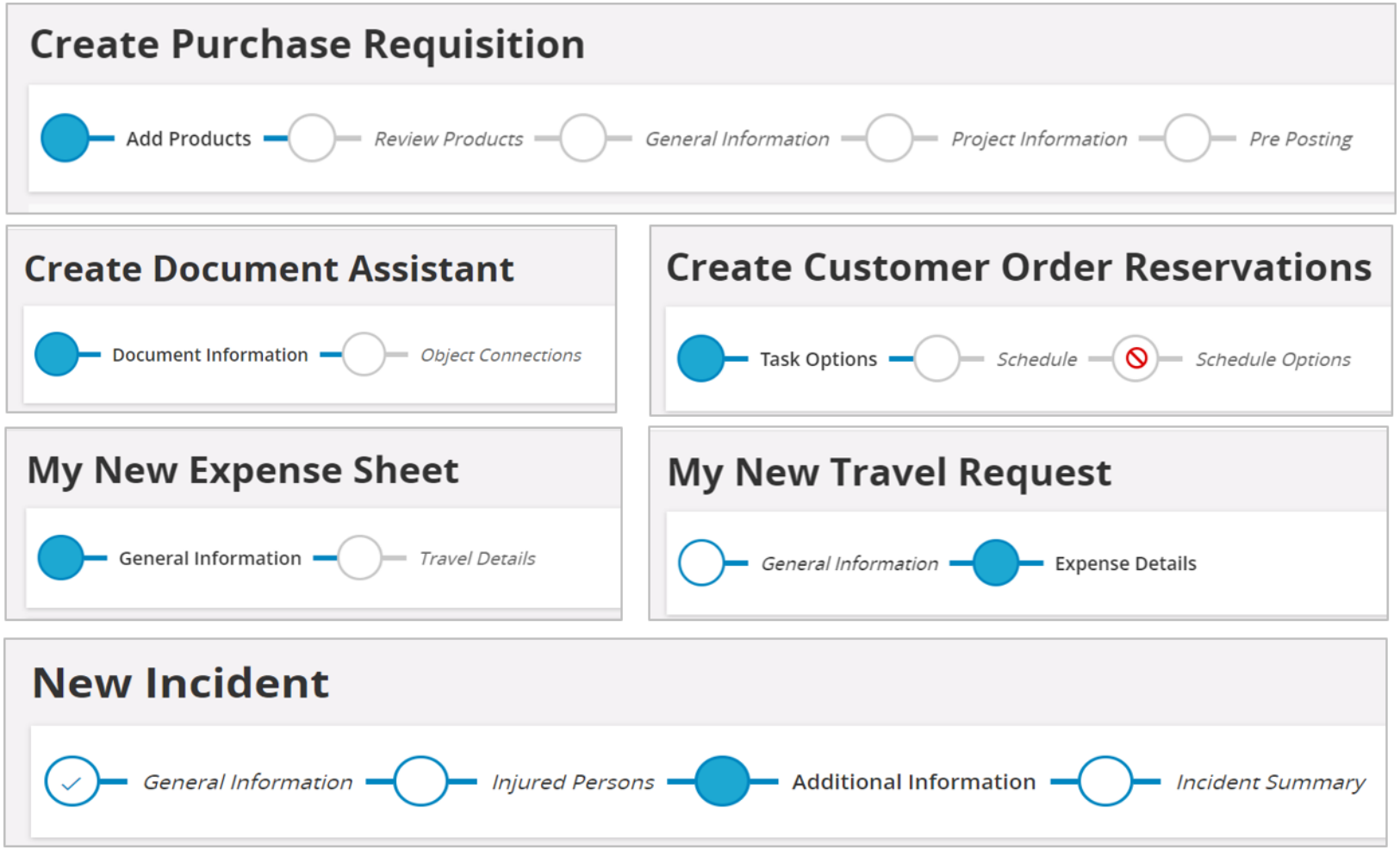
Experienced users can change the advanced search.

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:

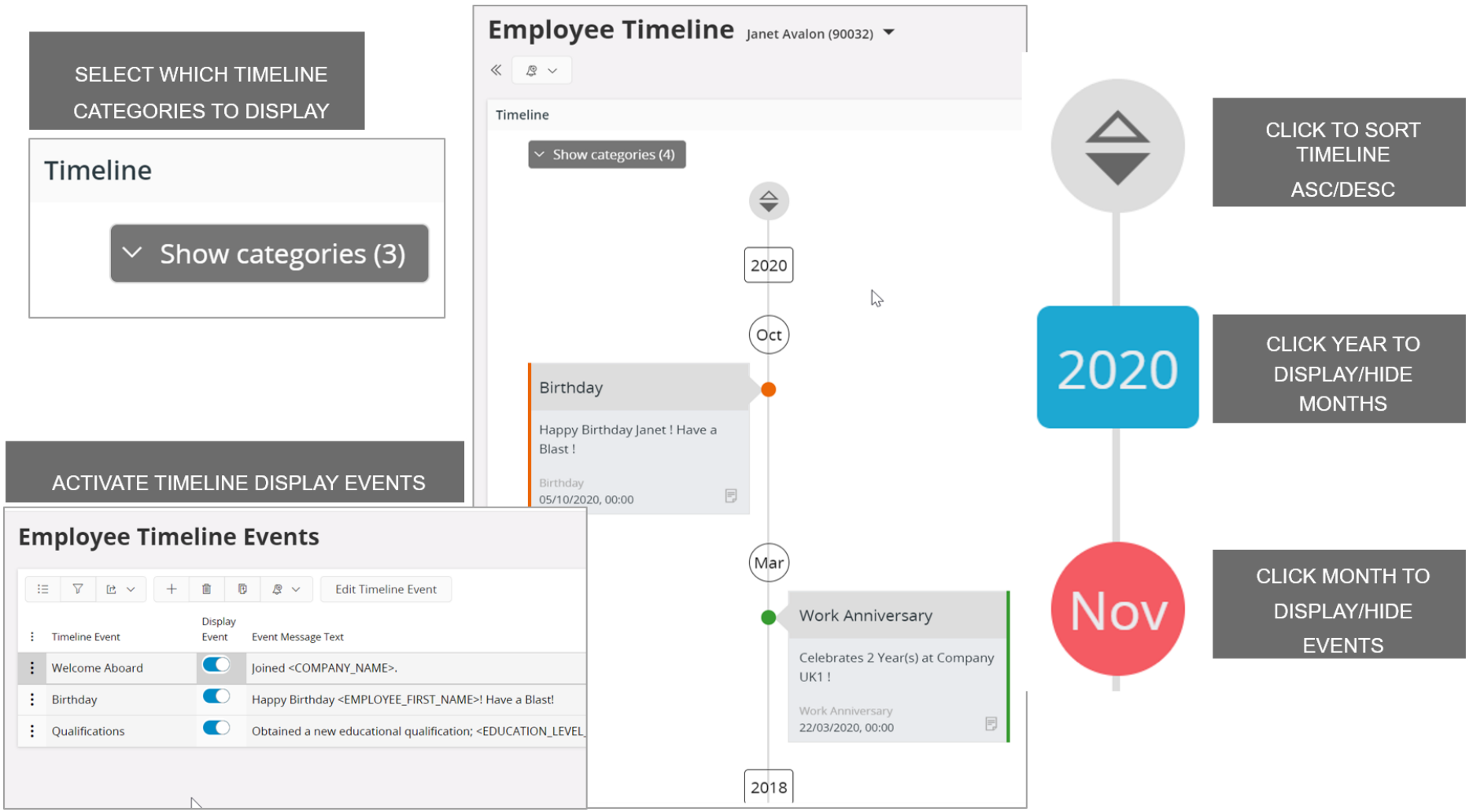


Assistant

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

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

TIMELINE


SELECT WHICH TIMELINE CATEGORIES TO DISPLAY
Timeline
Show categories (3)
ACTIVATE TIMELINE DISPLAY EVENTS
Employee Timeline Events
Edit Timeline Event
Timeline Event
Display Event
Event Message Text
Welcome Aboard
Joined <COMPANY_NAME>.
Birthday
Happy Birthday <EMPLOYEE_FIRST_NAME>! Have a Blast!
Qualifications
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
2020
CLICK YEAR TO DISPLAY/HIDE MONTHS
Nov
CLICK MONTH TO DISPLAY/HIDE EVENTS

Timeline

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

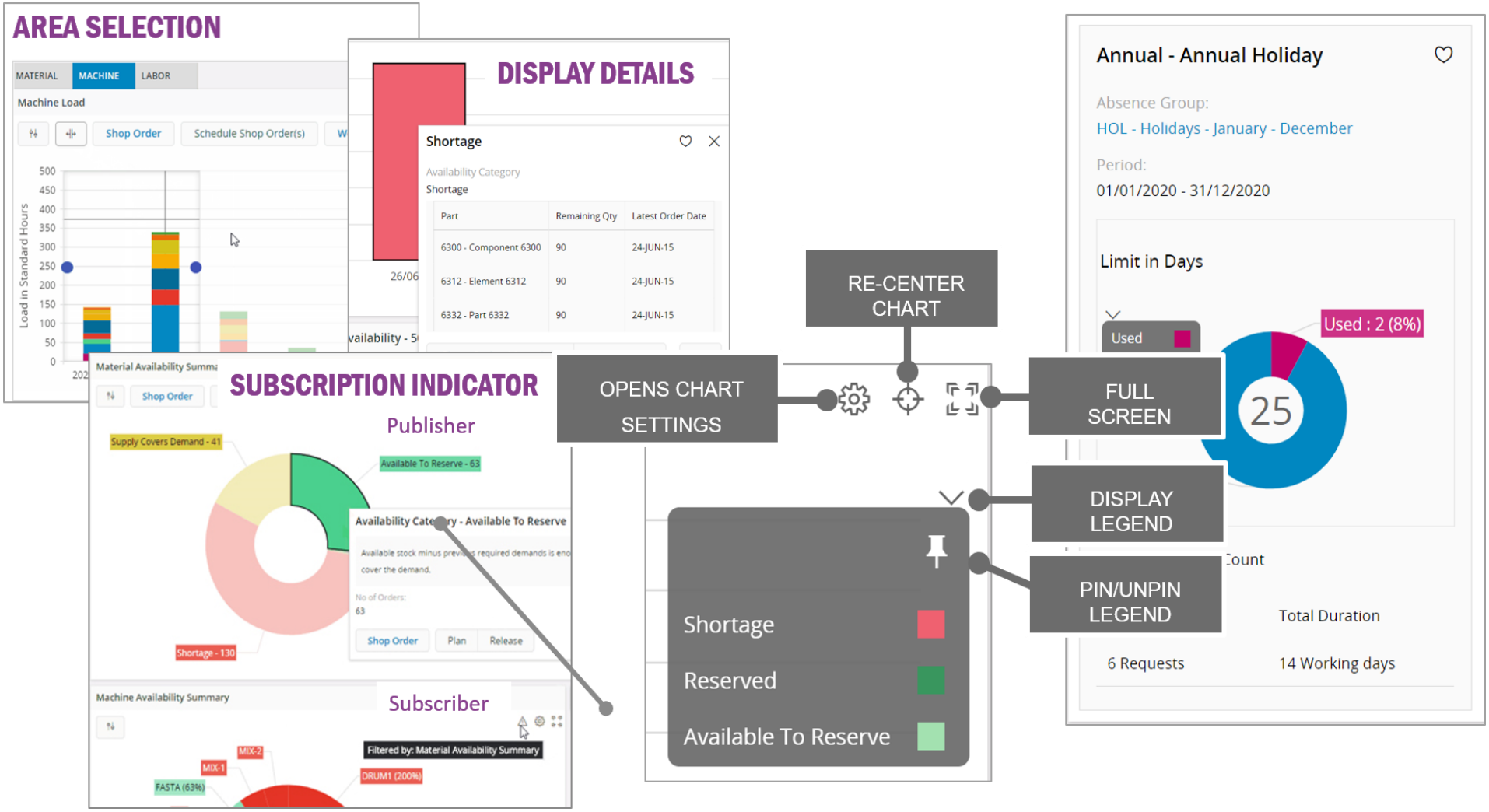
Easy click to open/close, sort asc/desc, specific timeline information.

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


AREA SELECTION
MATERIAL
MACHINE
LABOR
Machine Load
Shop Order
Schedule Shop Order(s)
Load in Standard Hours
DISPLAY DETAILS
Shortage
Availability Category
Shortage
Part
Remaining Qty
Latest Order Date
6300 - Component 6300
90
24-JUN-15
6312 - Element 6312
90
24-JUN-15
6332 - Part 6332
90
24-JUN-15
SUBSCRIPTION INDICATOR
Publisher
Supply Covers Demand - 41
Available To Reserve - 63
Shortage - 130
Shop Order
Plan
Release
Subscriber
Machine Availability Summary
Filtered by: Material Availability Summary
MIX-2
MIX-1
FASTA (63%)
DRUM1 (200%)
RE-CENTER CHART
OPENS CHART SETTINGS
FULL SCREEN
DISPLAY LEGEND
PIN/UNPIN LEGEND
Shortage
Reserved
Available To Reserve
Annual - Annual Holiday
Absence Group:
HOL - Holidays - January - December
Period:
01/01/2020 - 31/12/2020
Limit in Days
Used
Used : 2 (8%)
25
Total Duration
6 Requests
14 Working days

Charts

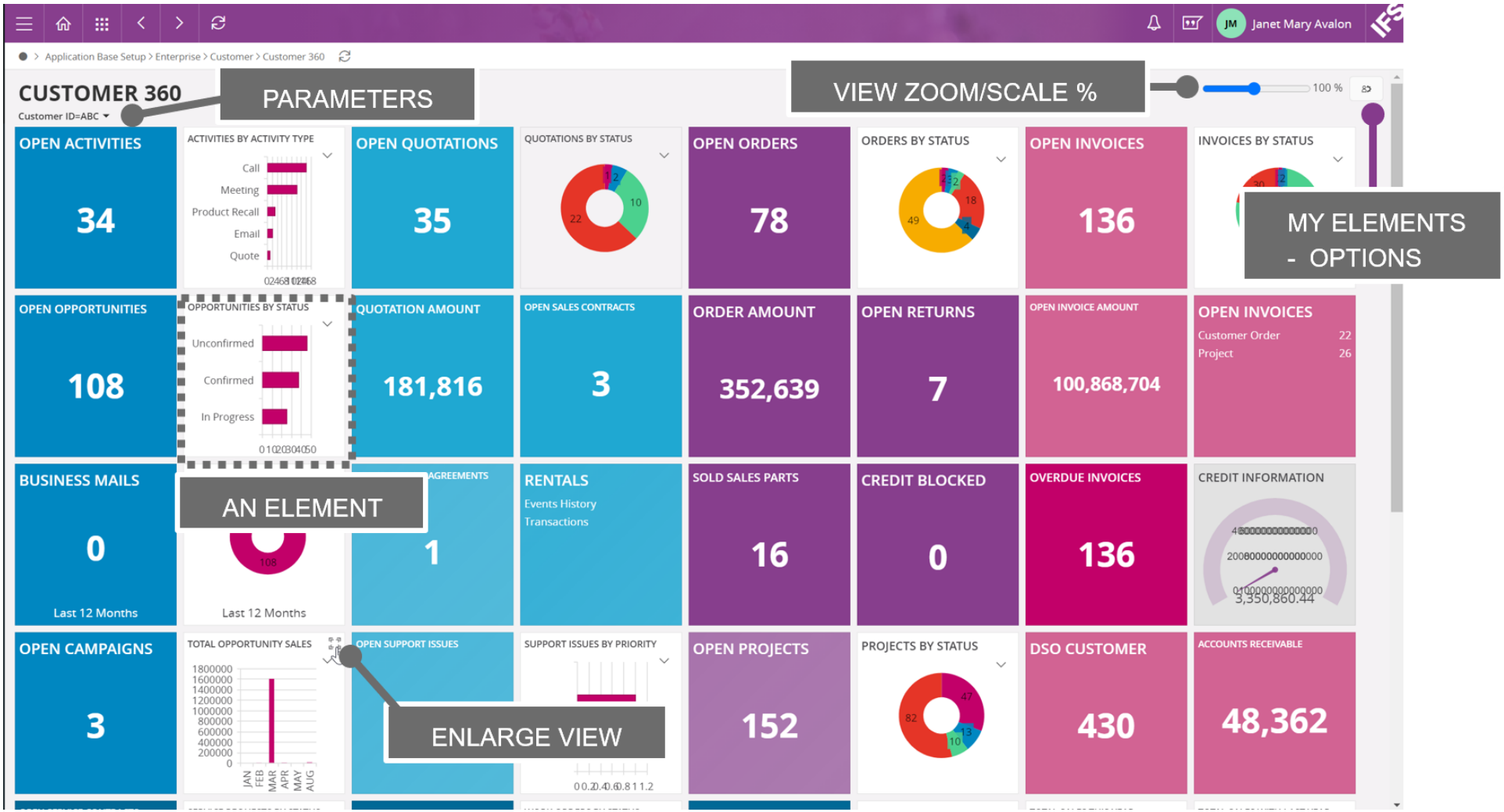
Charts have been embedded in various pages to provide a clear and immediate impression of information and details. Many will have drill down capabilities, dynamic tool tips, the ability to select specific attributes and the ability to focus on specific areas. *Note: some charts will only be displayed 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. *Note: this option is ONLY available in Gantt that have dependency lines defined*
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

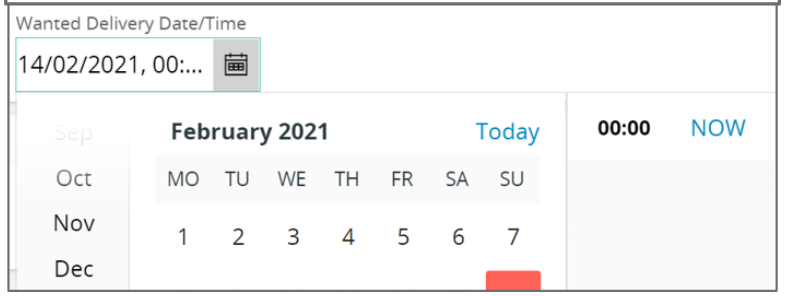
Lobby pages should be used as a Home or as starter pages for a user.
Visualise business information then take action as required and see the immediate effect.

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

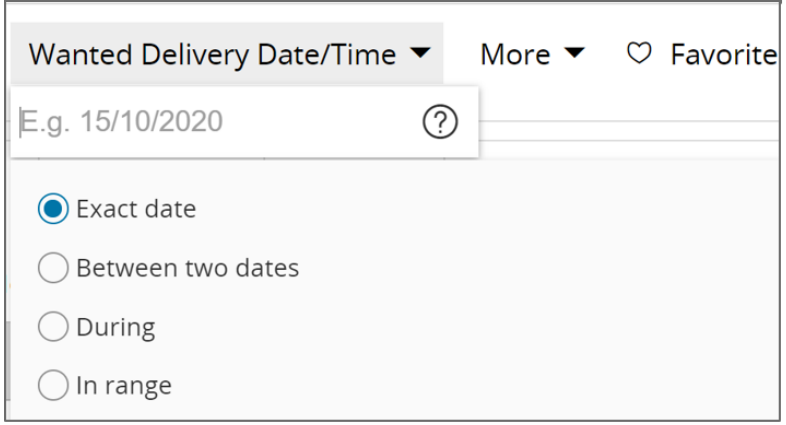
LOBBY PAGE	Consists of a number of lobby elements.
ELEMENTS	These are specific displays within a lobby page. There are many different styles of element.
LOBBY OVERVIEW	Not all standard Lobbies are shown by default in the Navigator. Add the ones you need as a Bookmark. **Note: users with relevant configuration/admin 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. *For example: Customer ID, Site, Project etc.* 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



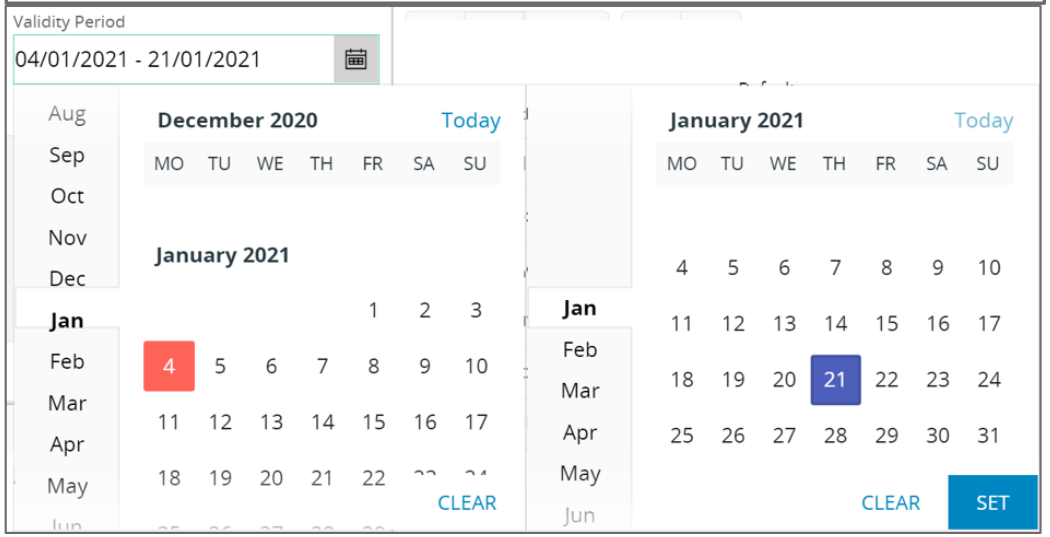
DATE FILTER



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

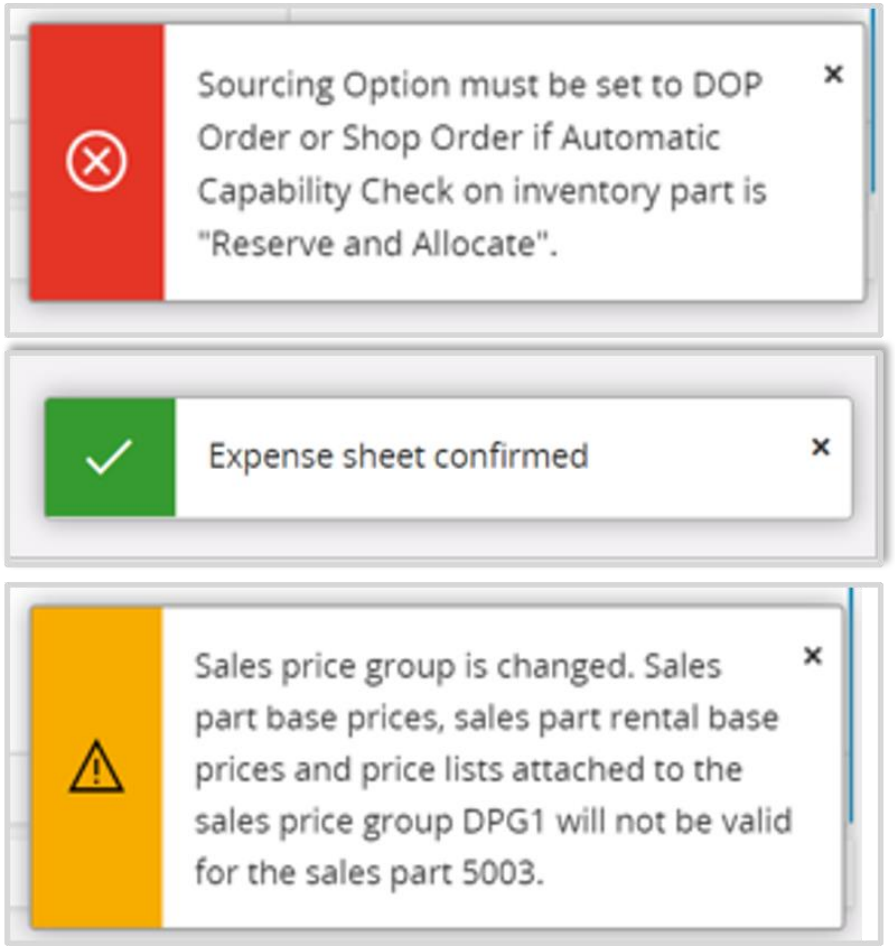


Working with dates

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. *Note: select a column to filter & this will automatically appear in the filter area of the page.*
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



CURRENT STATUS

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.

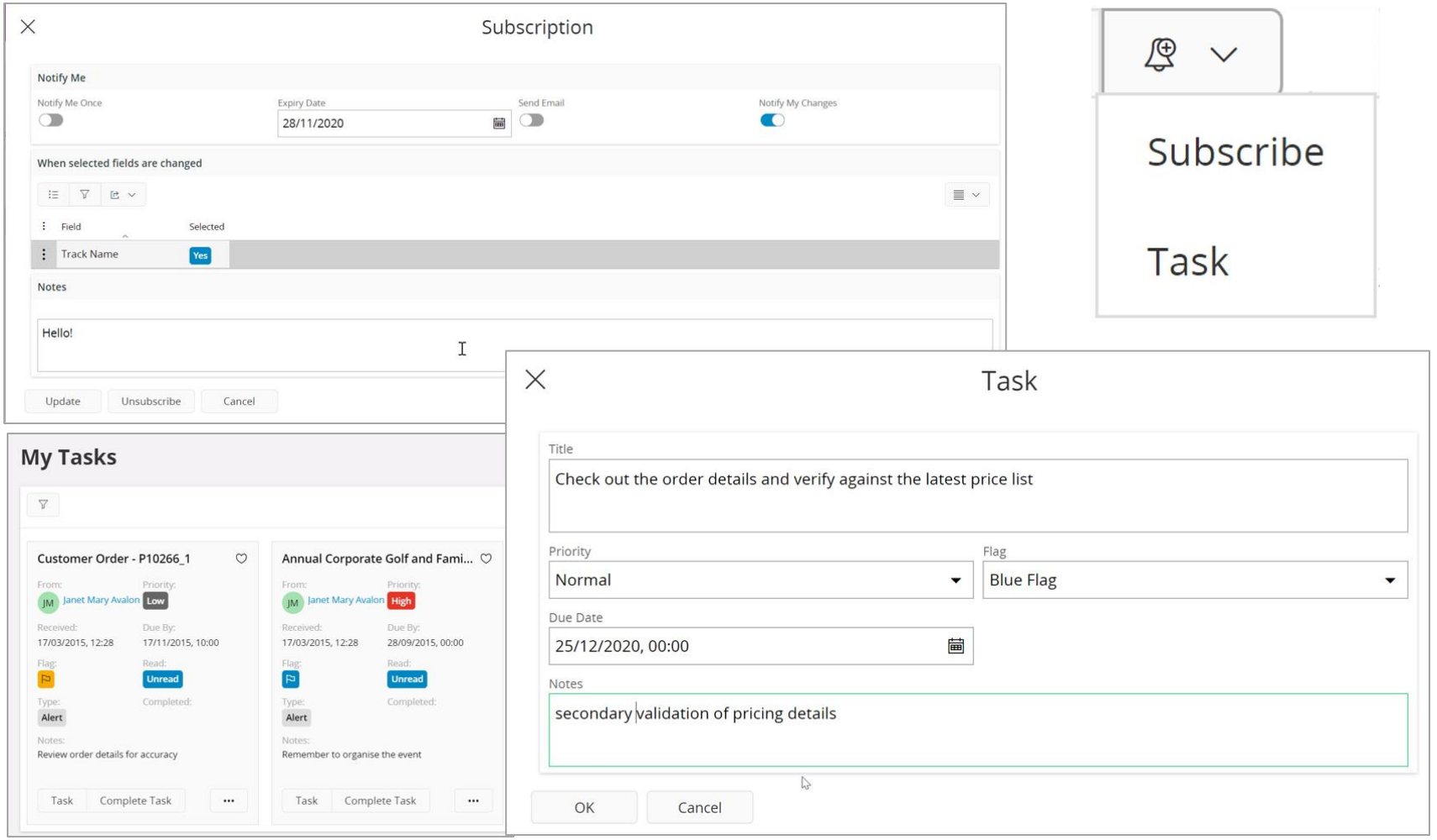
Current Status

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.



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.

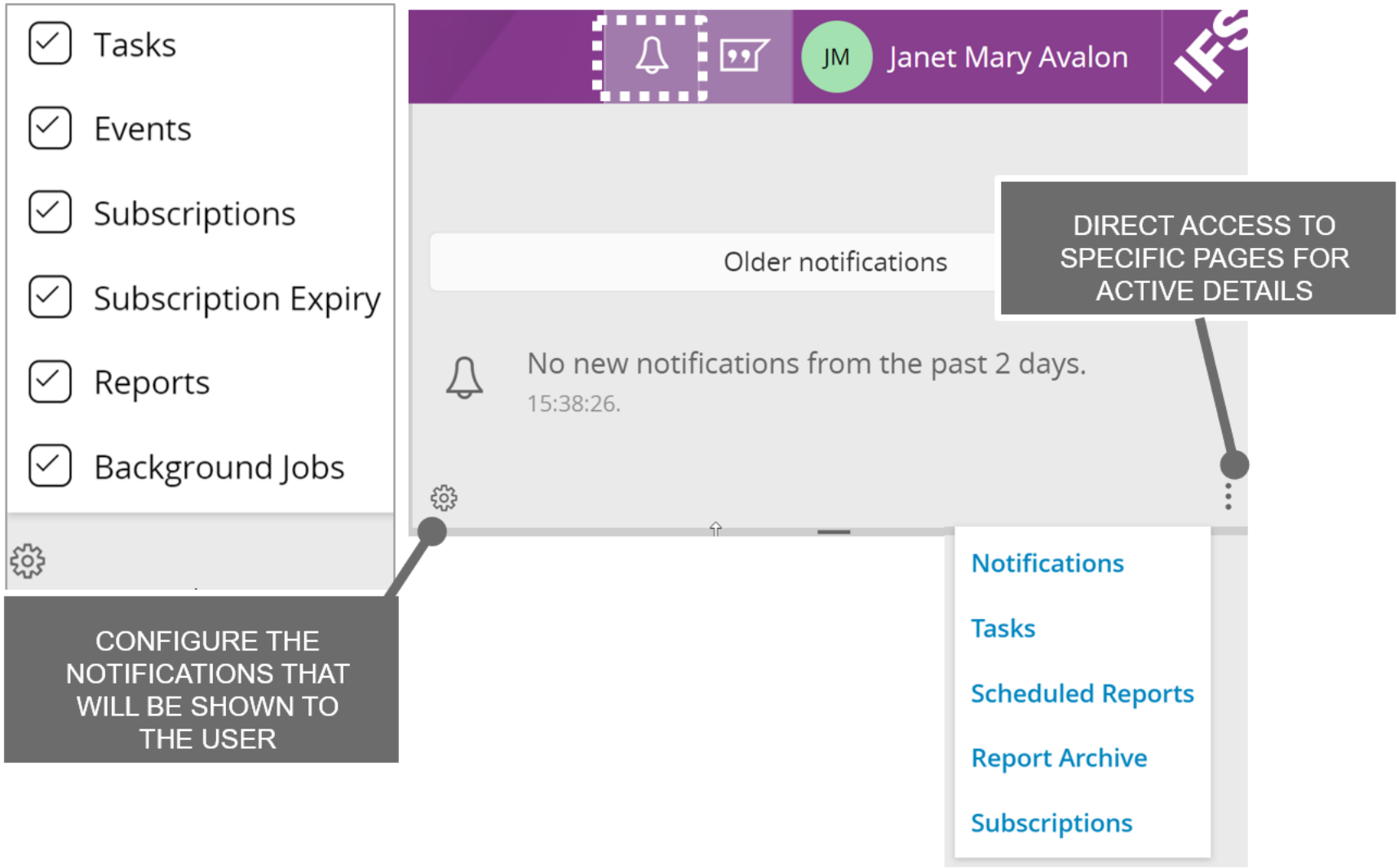
What is a task?

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



Notifications

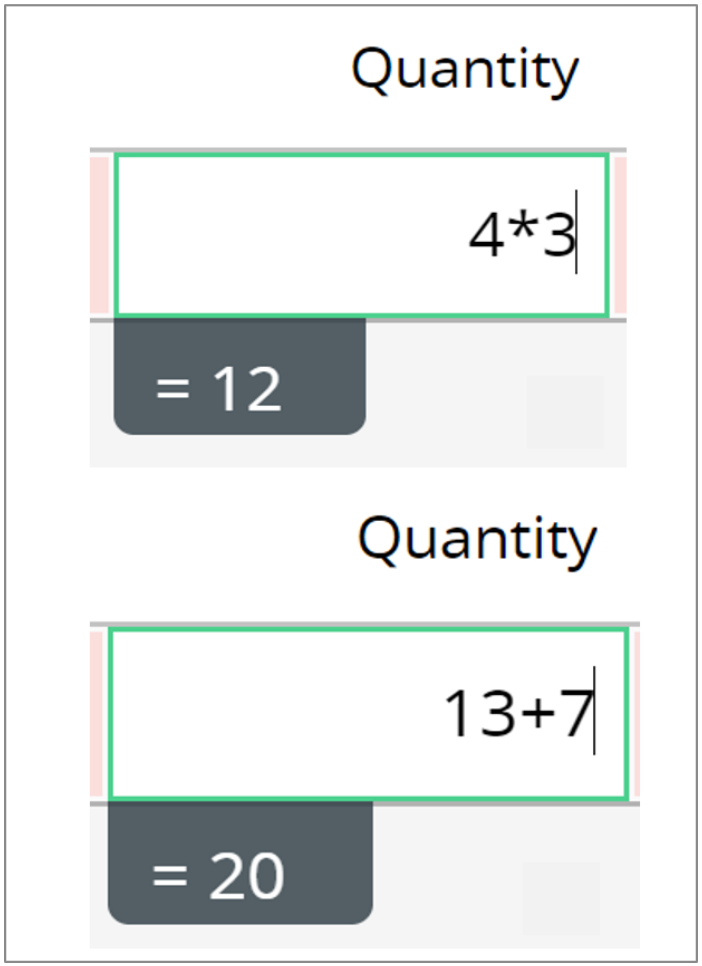
The Notification panel shows live and interactive messages for the user and is accessed from the Application Menu bar.

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

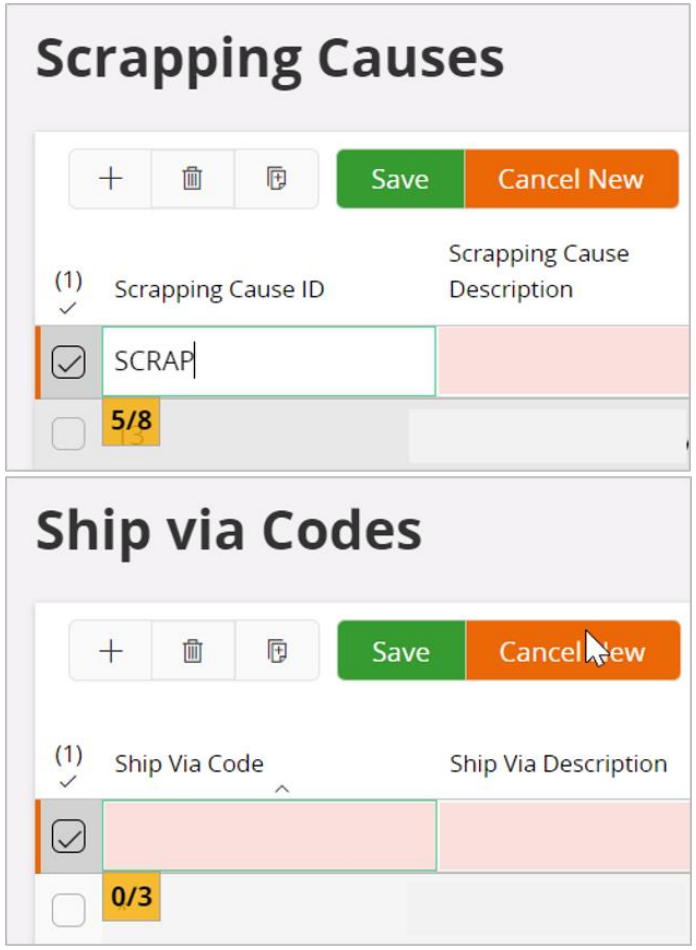
Use the cog to configure the contents of this view and determine which notifications are visible to the user.

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



CHARACTERS LEFT TO USE IN A FIELD



In-field Calculations

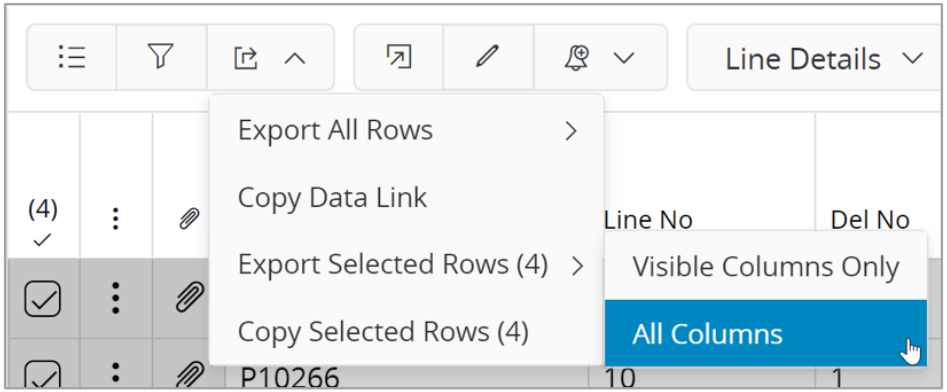
In quantity fields a simple calculation can be made directly in the field itself.

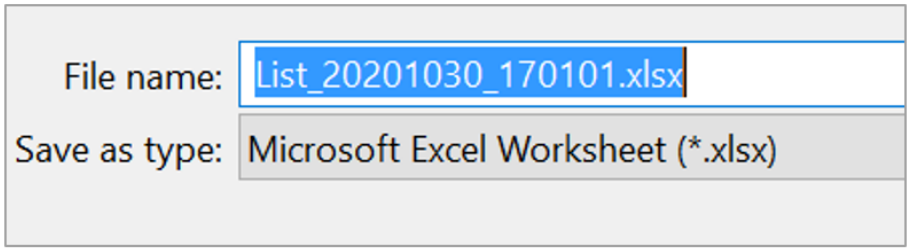
For example: 4*3 = 12 13+7 = 20

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





A1 | 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							

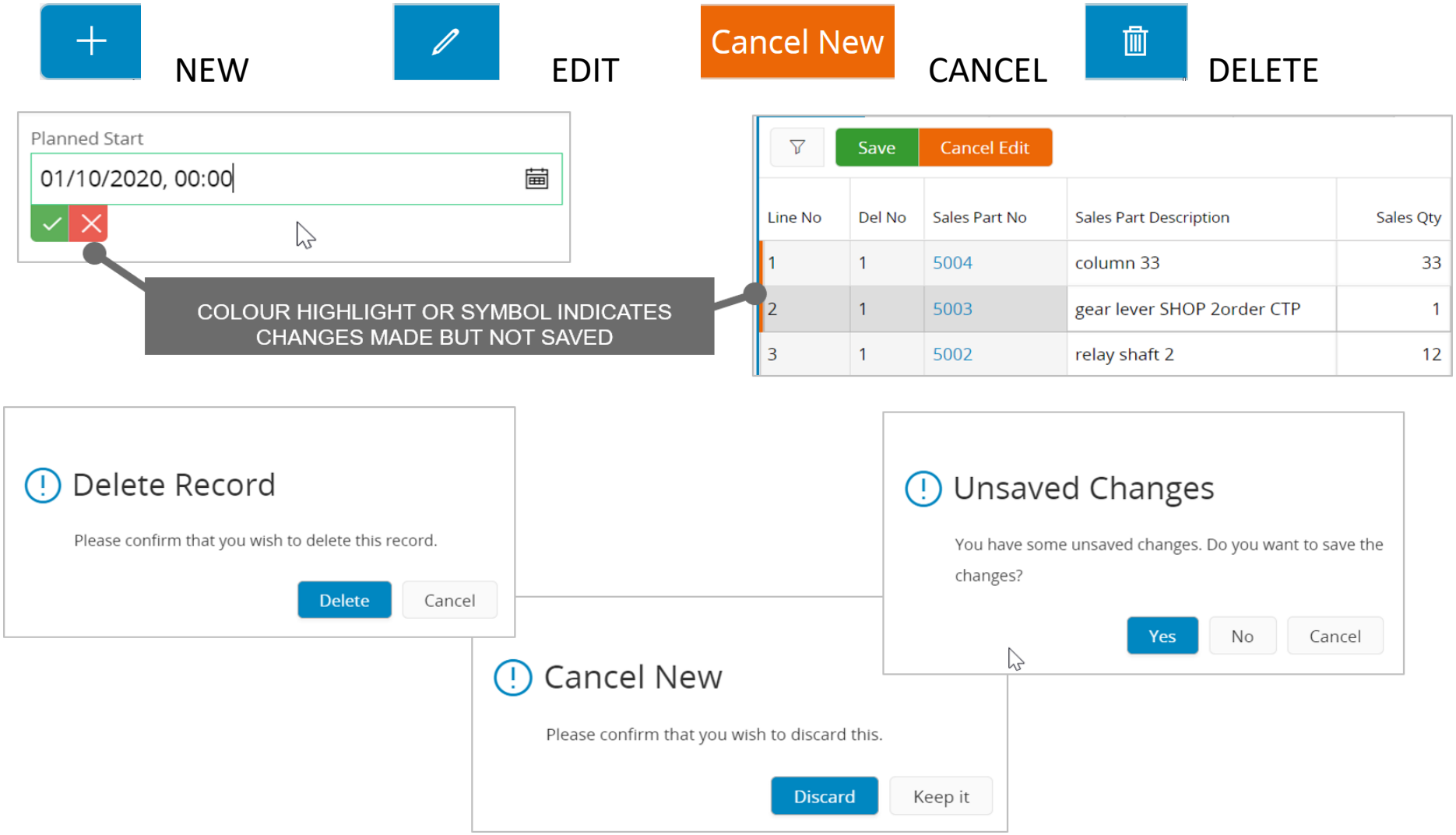
Export or Copy/Paste selected records

EXPORT OR COPY/PASTE SELECTED RECORDS **OPTIONS:**	
Export all rows >	Visible columns only or all columns *Note: this exports <u>all</u> the filtered rows regardless if they are in view on the page.*
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

<u>NOTE - Limitations in the initial release of IFS Cloud:</u>
There is no paste option back into Aurena itself. Consider using Duplicate to copy records.

NEW – EDIT – CANCEL - DELETE

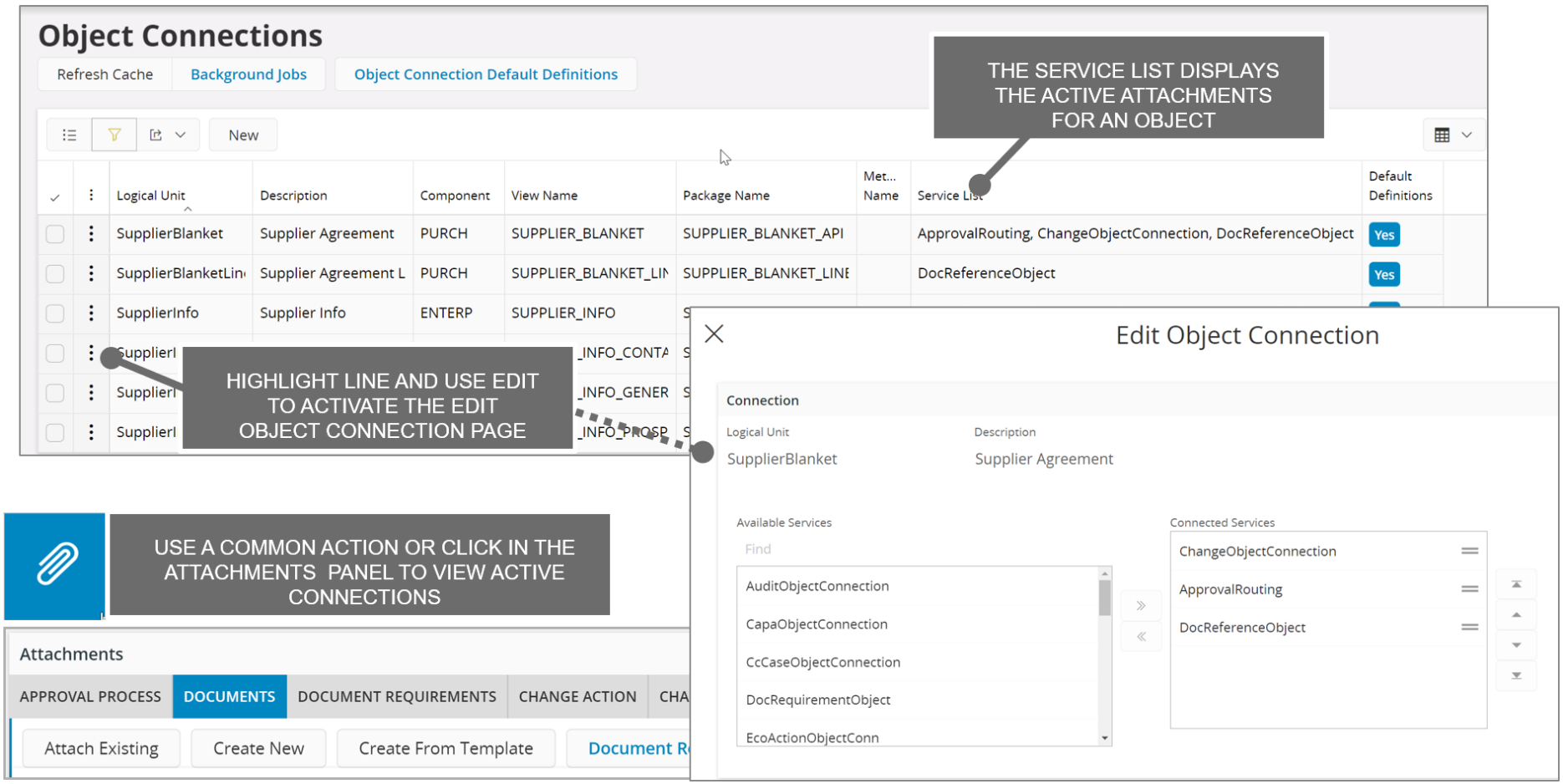


General Comments - New, Edit, Cancel and Delete

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. *Note: the SAVE option will only appear once all required fields are complete.*
EDIT	**Multi-line and multi-record Edit/changing in one action is standard**. Change current records - Edit will highlight all lines 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. *Note: SAVE will only appear when relevant.* *Note: unsaved changes will be indicated to the User before they leave a page.* *Note: the use of EDIT will cause page buttons to be hidden whilst Edit is active* *Note: certain fields will have a X/√ shown against the field itself to Save or cancel changes.*
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/√* 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



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