

ORCHESTRA Setting up Your Cockpit & Customizing Your Views Practice Lab



Contents

Overview	3
Step 1: Setting up your common functions	3
Step 2: Setting up open documents	4
Adjusting visible data	5
Step 1: Open up a document containing a table	6
Step 2: Adjust form settings	6
Step 3: Auto-fit columns	7



Overview

Welcome to Orchestrated! Throughout your implementation, we're going to be sending you these labs and tests to practice what you've learned. Your consultant will send these to you during the appropriate stages of your implementation so that you (and the other users at your company) can practice what you learned during that week's topic. We know that there's a lot of information to take in, but if you do these quick exercises, you'll find that by the time you go live, you'll have all the tools you need!

This lab is going to familiarize you with how to set up your primary workspace in Orchestrated, called your cockpit. Just like the pilot of an airplane, you want all of your most needed functions right in front of you, and Orchestrated makes that easy.

Who picks the customizations?

Customizations to your common functions & open documents box is based on user login. This means that Penny the Accountant might have a different cockpit than Bruno the Brewmaster. Each user should complete this lab to set up their cockpit the way they will need it. Remember, you can find all the functions you'll need in the modules.

In our labs, names of editable fields will be <u>underlined</u> (example: "click in <u>item description</u>"). Clickable items like modules or menus will be **bolded** (example: "click on **modules**"). Key terms for Orchestrated will be *italicized*.

Step 1: Setting up your common functions

When you first log in, you'll see two big empty boxes, which we call widgets. You're going to add several shortcuts to them to help you get to the functions you need more quickly. At first, we'll set this up for purchasing, but when we're done, you'll be able to clear those shortcuts out and replace them with whatever is more relevant to your responsibilities.

the late time that the lines	Just Yosher Die			
R 🖶 12 D 📾 🗟 🖻 🕸	G. 新日林卡卡州等学历 法国际委任官院 光 G. 带 圆尾属于 O. 用用			
	* values, date, tou as in the rate output of waits, the title.		Real and a result the order second	
a Campional				
C Rose (Correct)	Common Practica	~		
a 144				
AL Series				
A Trance				
w actuary				
a Si beater				
Si man				
1 S. martaday				
EP Grand High	Childpan Documents	~		
Constantinuitiens				
Gen Second				
Manage and Airts				
a hour	The configure of these subgets a contradication from the soundary.			
- Darkard Haat				
	0807			
	44			



- 1. Click on **modules** in the vertical bar all the way to the left.
- 2. Click the **purchasing- A/P** bar.



- 3. Click and drag **purchase order** to your **common functions** box. Note that when you release your mouse button, purchase order remains in the box.
- 4. Click and drag goods receipt PO, A/P invoice, and recurring transactions to your common functions box.

These shortcuts will enable you to quickly access the tasks you perform the most. To remove functions, simply drag them out of the *common functions* area.

Any time you need to access a function that isn't in your common functions box, you can find them all waiting for you in the **modules** area.

C Administration	-		
Ginancials		Common Purchase	· · · · · · · · · · · · · · · · · · ·
≥ Opportunities		Territoria interestatione	
Saks - A/R		Furchase Order	
Purchasing - A/P			
Purchase Blanket Agreement			
E Purchase Request			
 Purchase Quotetion 			
Furthase Order			
Goods Receipt PD		Open Documents	×
Goods Raturn			
A/P Down Peyment Invoice			
A/P Invoice			
A/P Credit Herne		The content of this weget is not defined for this code	day.
A/P Reserve Invoice			
 Recurring Transactions 			
Recurring Transaction Templates			

Step 2: Setting up open documents

This box will provide you with quick access to open documents of the type you choose. Need to look at all your open purchase orders? No problem. Just add them here. Let's add a few for purchasing. Afterwards, you'll remove these if they're not relevant to you.

1. Click on the **wrench** in the upper right-hand corner of the *open documents* box.



- 2. Click **settings.** A window will open with a list of checkboxes.
- 3. Select the documents you want to be displayed by checking the corresponding box on the right. Choose as many as you need.
- 4. Click **OK**

-	and the state of the second	
- and	Incoded	Taken .
	All Look Permit	1.21.28
	All fears have week	
	All Reserve Street and No. 14, Subjects	
Automatical in	P Autom Balaters	
	Automa Drees	
	Tanah Barrier File.	2
	Same Intern	0.1
	all loss Agreet, coust	
	AP Inst Assessed - Int 141 hits Author	
	AP Dome	
	AP cash herei	
	of Sector Strategy Strategy	
	All Bases house. By the Manual	
Parketter .	Participant damage	
Real Property lies	Hanna Band	
and a	increase link	
	and the second se	Summer States & Language 1
		and the second

You'll see the tiles of the documents you selected appear in your *open documents* widget. Unless you remove them, these will be available to you any time you open Orchestrated. There should be numbers next to each one, indicating how many of that type of document you still have open. Here you can see that I have 10 open purchase orders.

 Open Documents 				
Purchase Orders (311)	Goods Receipt POs (3)	A/P Involues (18)	A/P Credit Merres (8)	

Important

To save these customizations, you will always need to exit Orchestrated by utilizing **File>Exit.** If you click the X in the top right, customizations to your layout will not be saved. If you don't see number next to the documents:

1. Click on the **wrench** in the upper right-hand corner of the *open documents* box.

2. Click **refresh**

3. The widget will refresh and the numbers will appear next to each.

To remove documents form your widget, follow the same steps you followed to add then, and uncheck the boxes next to those you no longer want.

To finish, add a few more functions, **file > exit**, log back in, and verify that those customizations saved. You're read to start using Orchestrated!

Adjusting visible data

You might find yourself needing to see different information that Orchestrated is displaying to you. In this exercise, we'll discuss how to change the information you're viewing using **form settings**. This is a very valuable function in Orchestrated, and it's available any time you're looking at a chart.



Step 1: Open up a document containing a table

For this step we have to open up a document you may not have used yet, but we'll go over it in future labs. For now, we only need it for it's

display.

- 1. Click modules> purchasing >purchase order
 - a. The purchase order window will open, in add mode. In the toolbar at the top of Orchestrated, click the **document arrows** until you locate a purchase order with a few items.

It will probably look a little like this:

Note the top of the table in the contents tab. It's all codes and quantities. Who can tell what we ordered? We can fix that in form settings.

Step 2: Adjust form settings

land	ine i		V1011			No.	Primary		0012	. 0	
Name			Beer Parkaning	Supples Inti		Status			Closed		
Cont	act P	Remain Income		seppen ent.	v (6)	Posting	Date		13/26/16		
Vend	lor R	of, No.				Delivery	Date		13/26/16		
Loca	Cu	mency *				Decum	ent Date	6	13/26/16		
_			_								
		Contenta	Lo	gatea		Acco	unting		Atachri	enta	
254	n/5	ervice Type	Den			Summ	ary Type		No Summary		٠
	25	m No.	Quantity	Unit Price		Disc	Tax C	Total ().	.C)		
1		P62007	1,000	1	\$ 0.1300	0.00	III EX			\$ 130.000	
2		PG2015-1001	1,000		\$ 0.1300	0.00	I EX			\$ 130.000	
з		PG2015-1002	1,000		\$ 0.1300	0.00	I EX		1	\$ 130.000	
4		PG2015-1003	1,000	1	\$ 0.1300	0.00	III EX		1	\$ 130.000	
5		PG2015-1004	1,000	1	\$ 0.1300	0.00	III EX		1	\$ 130.000	
6		PG2015-1004-N	1,000	1	\$ 0.1300	0.00	III EX		1	\$ 130.000	
7		PG2015-1005	1,000	1	\$ 0.1300	0.00	III EX		1	\$ 130.000	
8		PG2015-3006	1,000	1	\$ 0.1300	0.00	I EX		1	\$ 130.000	Ψ
	4										
luye	٢		No Sales Emplo	yee.	• 0	Total Be	fore Disco	unt [\$ 4.56	8.20
2vm	•					Discourt	1	16			
						Freight					
						🗌 Ray	inding				
						Tax					
						Total Pa	syment Due			\$ 4,56	8,20
1011	185		24								

Form settings lets us show and hide various fields in our tables, so let's set our preferences for production orders.

- 1. With the production order open, click the form settings button in the toolbar.
- 2. Click the **table format** tab.
 - a. From here, you can add or remove columns using the checkboxes
- 3. Check the box next to item description.
- 4. Click OK





The purchase order will not show the description of the items listed in the *item description* column. But the column width isn't quite what we want it to be. We can adjust that quickly, too.

Step 3: Auto-fit columns

 Still with the purchase order open, go up to the menu bar and select View> Fit column width

If you look back at our production order, you'll see the columns are sized just right now. Both options are available almost any time there is a table in Orchestrated. Remember them; they'll help make Orchestrated even more accessible and easy to use.

lands		VIDIN			No.	Primary	100	- 0		
Name		Beer Packaging Supplies Intil			Status	Closed				
Conta	act Person	• 3			Posting Date		03/2	03/26/16		
Verdor Ref. No.					Delivery Date			03/26/16		
local	Currency *				Docum	ent Date	03/2	6/16		
_	Contents	_	Logistics		keen	urfino		Attachments		
		_								
Det	n/Service Type	Den			Summ	егу Туре	No	Summery	٠	
٠	Dars No.	Quantity	Unit Price		Disc	Ter C	Total (LC)			
1	PG2007	1.0	00	\$ 0.1300	0.00	IQ EX		\$ 130.000		
2	PG2015-1001	1,0	00	\$ 0.1300	0.00	NO EX		\$ 130,000		
3	PG2015-1002	1.0	00	\$ 0.1300	0.00	🗢 EX		\$ 130.000		
4	PG2015-1003	1.0	00	\$ 0.1300	0.00	EX 💭		\$ 130.000		
5	PS2015-1004	1.0	00	\$ 0.1300	0.00	SQ EX		\$ 130.000		
6	PG2015-1004-N	1,0	00	\$ 0.1300	0.00	IQ EX		\$ 130.000		
7	PG2015-1005	. 1.0	00	\$ 0.1300	0.00	i EX		\$ 130.000		
1	PG2015-1006	1,0	00	\$ 0.1300	0.00	NO EX		\$ 130,000	٣	
	4									
Lye		-No Sales Em	ployee-	•	Total Be	fore Disco	and line	\$ 4.56	8.200	
hine	e				Discourt	e	16			
					Freight		-			
					Ell Roy	griding				
					Tax					
		d			Total Pa	ryment Due		\$ 4,568.200		
		1								
lena	fia	s.								
-		-								
Up	date Cancel							Copy Ta		