



ORCHESTRA

**Setting up Your
Cockpit & Customizing
Your Views Practice
Lab**



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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.

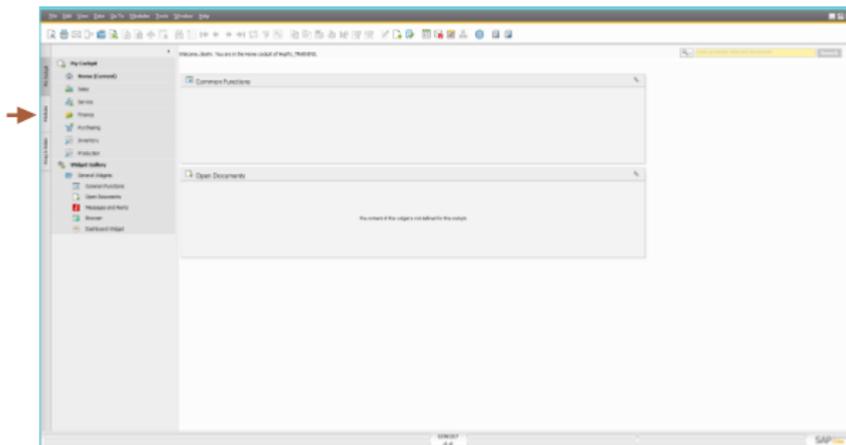
Who picks the customizations?

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 underlined (example: "click in item description"). Clickable items like modules or menus will be **bolded** (example: "click on **modules**"). Key terms for Orchestrated will be *italicized*.

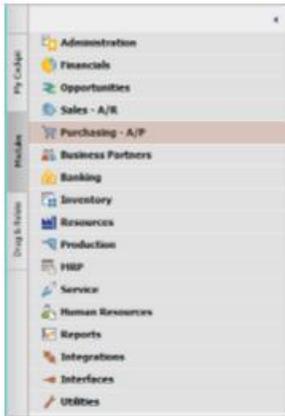
Step 1: Setting up your common functions

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.





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.



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**



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.



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 from your widget, follow the same steps you followed to add them, 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 ready 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

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

1. 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.

Purchase Order

Vendor: V1011 No. Primary: 19032 - 0
Name: Beer Packaging Supplies Int'l Status: Closed
Contact Person: Posting Date: 03/26/14
Vendor Ref. No.: Delivery Date: 03/26/14
Local Currency: Document Date: 03/26/14

Contents Logistics Accounting Attachments

Item/Service Type	Item	Quantity	Unit Price	Summary Type	Total (LC)
1	PG2007	1,000	\$ 0.1300	0.00 EX	\$ 130,000
2	PG2015-1001	1,000	\$ 0.1300	0.00 EX	\$ 130,000
3	PG2015-1002	1,000	\$ 0.1300	0.00 EX	\$ 130,000
4	PG2015-1003	1,000	\$ 0.1300	0.00 EX	\$ 130,000
5	PG2015-1004	1,000	\$ 0.1300	0.00 EX	\$ 130,000
6	PG2015-1004-N	1,000	\$ 0.1300	0.00 EX	\$ 130,000
7	PG2015-1005	1,000	\$ 0.1300	0.00 EX	\$ 130,000
8	PG2015-1006	1,000	\$ 0.1300	0.00 EX	\$ 130,000

Buyer: -No Sales Employee Total Before Discount: \$ 4,568,200
Owner: Discount: %
Freight: Rounding
Tax: Total Payment Due: \$ 4,568,200

Remarks:

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