ORCHESTRA

OCloud Overview

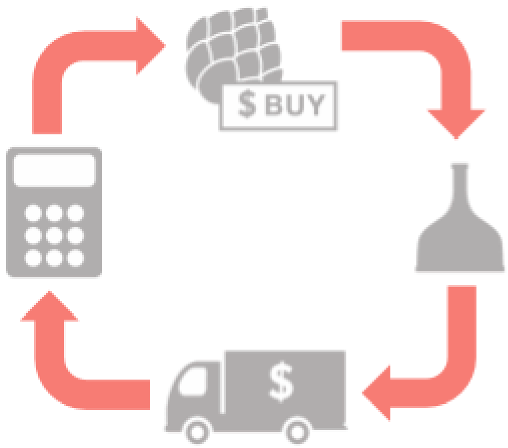
This guide will introduce you to the software roadmap, navigation and core functionality within Orchestrated!

Contents

Software roadmap

The Orchestrated continuous cycle

What are the components/departments required to make one orchestrated system? We have broken them out into 4 functions: Purchasing | Production | Sales | Financials. Each department is dependent on one another:



Purchasing – A/P (accounts payable)

Order materials | Receive orders | Verify incoming billing

Production

Each stage of production **consumes** the last:

Sales – A/R (accounts receivable)

Intake orders | Verify outgoing delivery | Bill customers

Financials

Real time accounting throughout daily operation

If one of the components is removed, the cycle is broken and cannot be completed, e.g. if money is not received through Financials, more ingredients cannot be purchased. If finished goods are not sold, no money will be received. If production shuts down for a week, the sales department has no end-product to sell.

Purchasing

<u>What will be created:</u>

Purchase Order (PO) – list of items to buy

Goods receipt PO – list of items brought into stock (received)

A/P Invoice – representation of what is owed to vendor/supplier

<u>What will be received:</u>

Software navigation

Logging-in

1. BEFORE LOGGING IN
    a. Mac Users: Download this Remote Desktop app – [Microsoft Remote Desktop 10]
    b. Windows Users: Remote Desktop should be pre-installed on your machine
2. In a browser, navigate to one of the URLs below depending on your Orchestrated instance

a. OnDemand: https://ondemand.orchestrated.com

b. Enterprise: https://access.orchestrated.com

3. Input your login information (Username & Password – provided by your consultant)
4. Click the Orchestrated icon
5. A program will download. Once it finishes, click to launch.
6. A Windows Security window will appear, re-enter your username and password and click OK

Databases

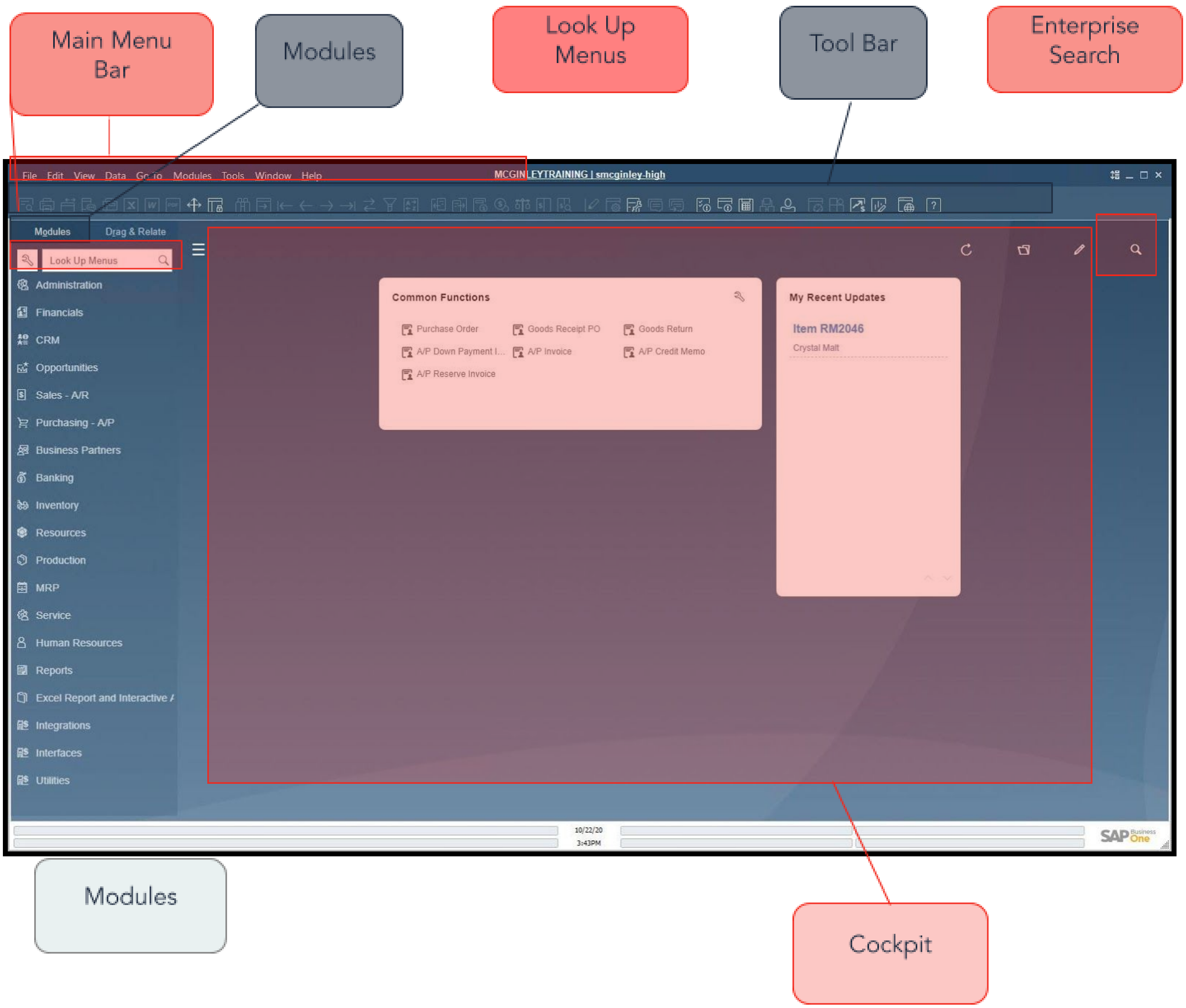
- Learning Database – mock data to practice and train with (not live)
- Template Database – blank (not live)
- Test Database – your data (not live)
- Productive Database – your LIVE data

Save Orchestrated to your Desktop for a faster log-in!

- Using the File Explorer on your computer, navigate to your Downloads folder.
- Right click on the SAPBusinessOne program and select CREATE SHORTCUT
- Drag and drop the shortcut file to your desktop

Navigation basics

Orchestrated is built on top of SAP Business One. SAP Business One is an ERP (Enterprise Resource Planning) solution and is the backbone to our product, allowing us to automate key business functions. The software organizes functions into Modules, and Orchestra Software has expanded upon these modules to assist Breweries with handling all aspects of the ORCHESTRATED Continuous Cycle (Purchasing | Production | Sales | Financials) on one, tailored platform. Let's look at the basics of navigating the system and see what the interface offers:



Main menu bar & tool bar

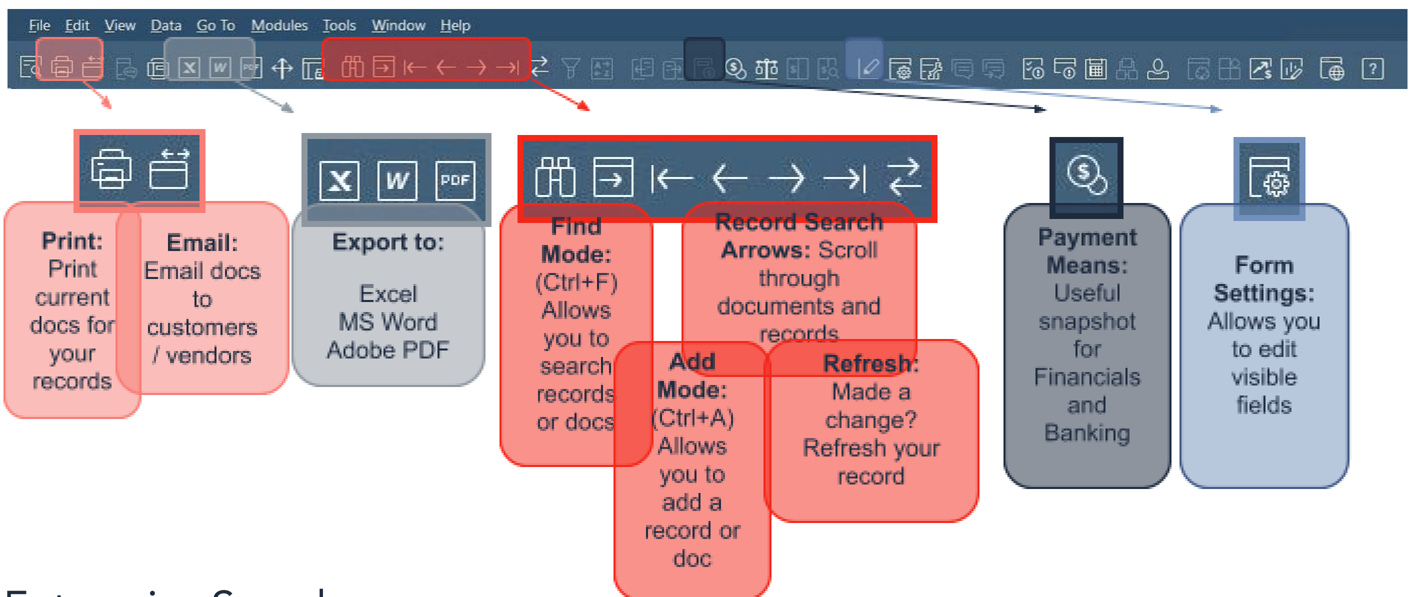
Main menu

File | Edit | View | Data | Go To | Modules | Tools | Window | Help

Can be accessed by right-clicking anywhere as well

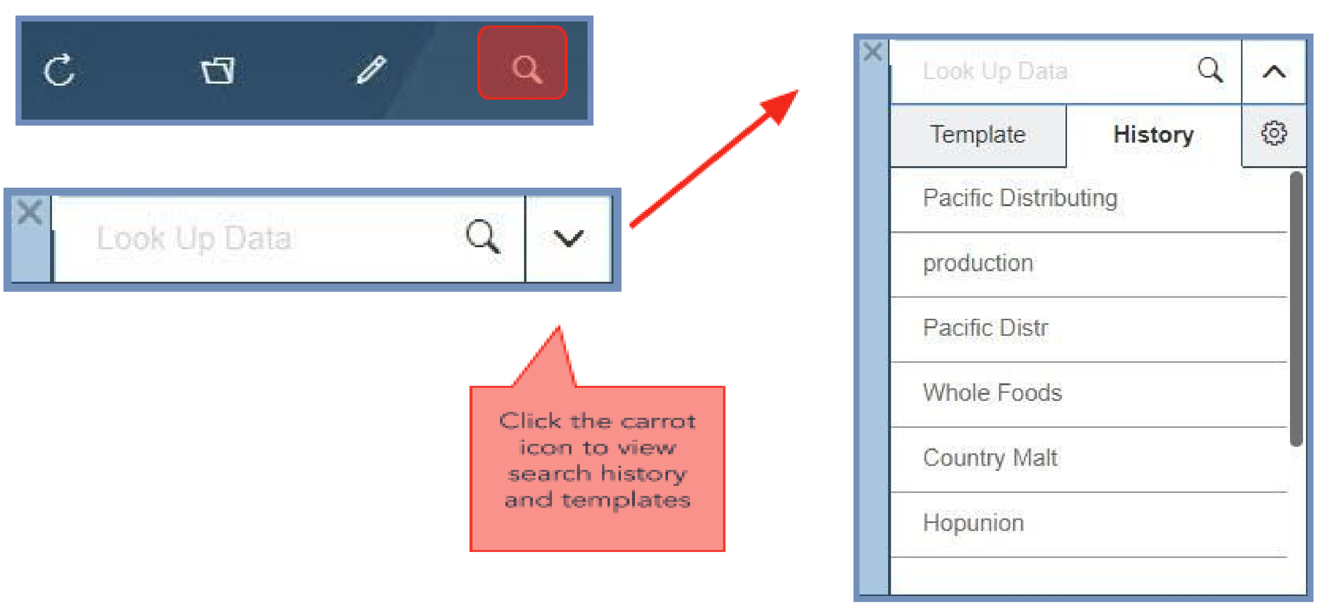
Help Menu: Useful for assistance with SAP

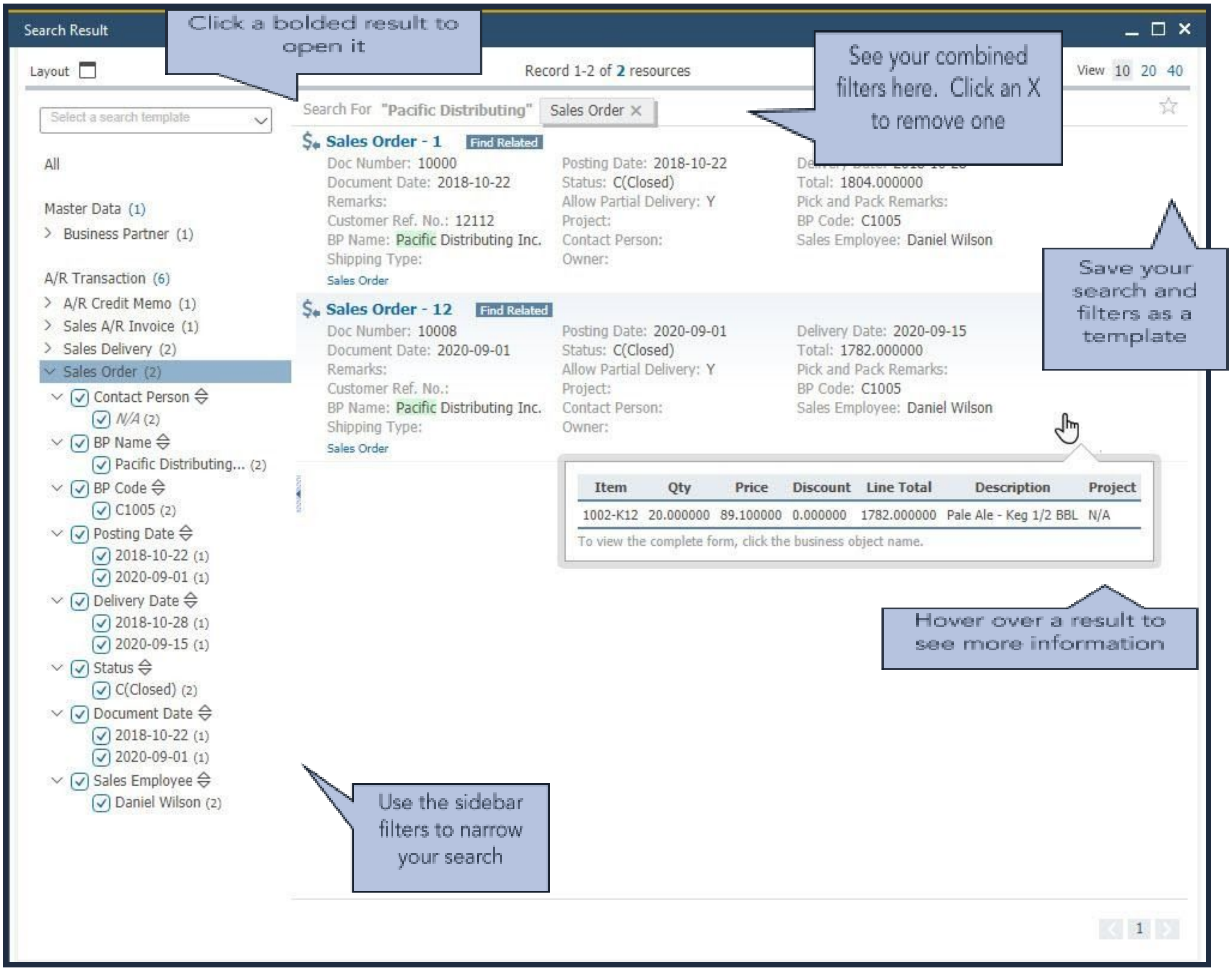
Tool bar



Enterprise Search

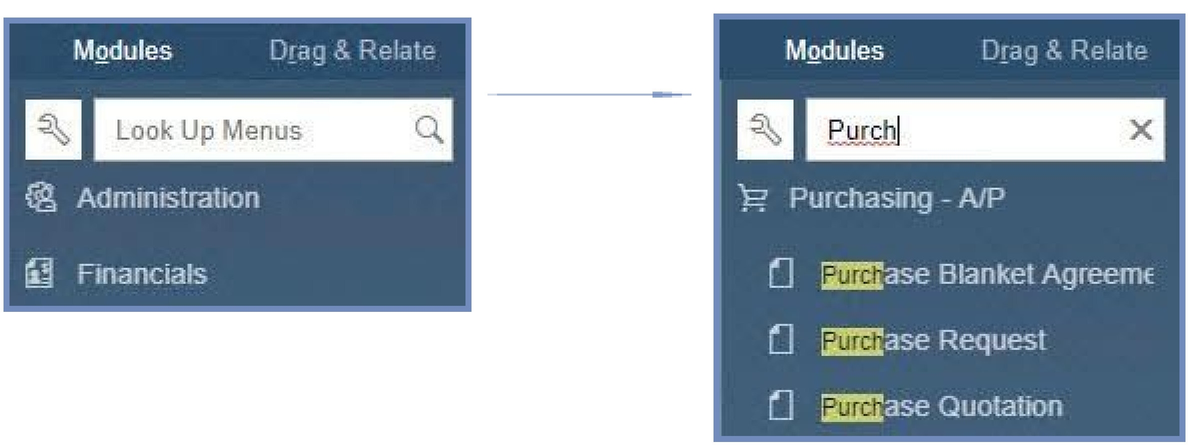
Search your entire database to find functions, records, and documents associated with your search term.





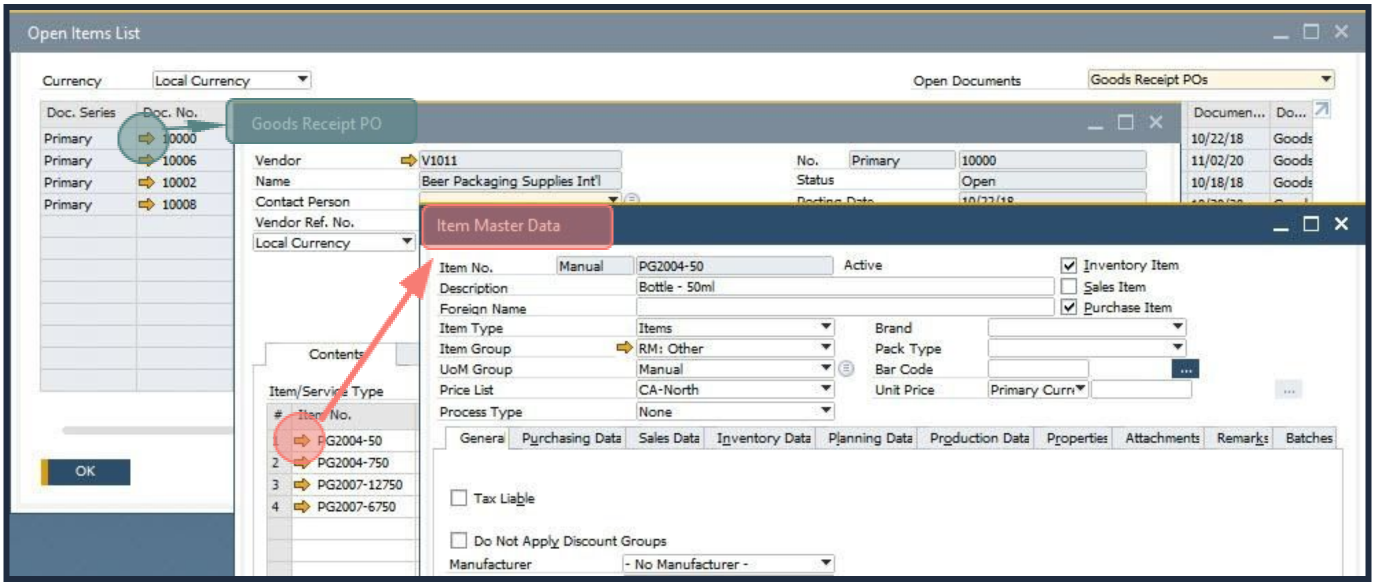
Look Up Menus

Find functions, documents, records, and reports using Look Up Menus. Begin typing and watch as Orchestrated narrows your list of results.



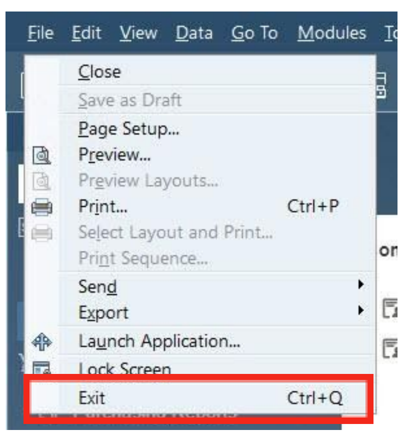
Yellow Arrows

Yellow arrows are used to "drill down" *within* functions to view deeper levels of data. Clicking a Yellow Arrow within or next to a field will open the document or record referenced by that field.



How to Exit

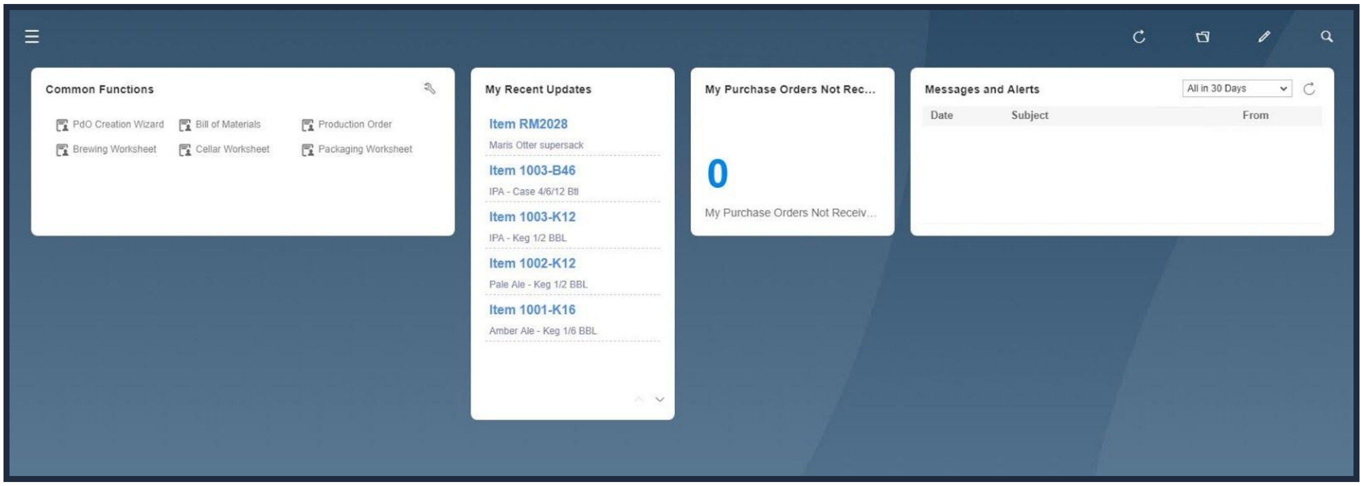
When customizing your view, such as utilizing your cockpits and changing form settings, it is important to note that clicking X in the top right corner will *NOT* save those changes you diligently made. Therefore, it is best practice to always use **File > Exit** to leave the software. Don't worry though, your data is safe regardless of how you exit Orchestrated.



Interface

Cockpit

The cockpit is the interface control room, where a user can view, search, organize, and perform their regular work functions.



It can be customized and edited at any time and will be each user's personalized work center. The Widget Gallery includes dozens of widgets that may be useful to you. Some commonly used widgets include:

Common Functions - can be customized with functions and documents you use on a regular basis.

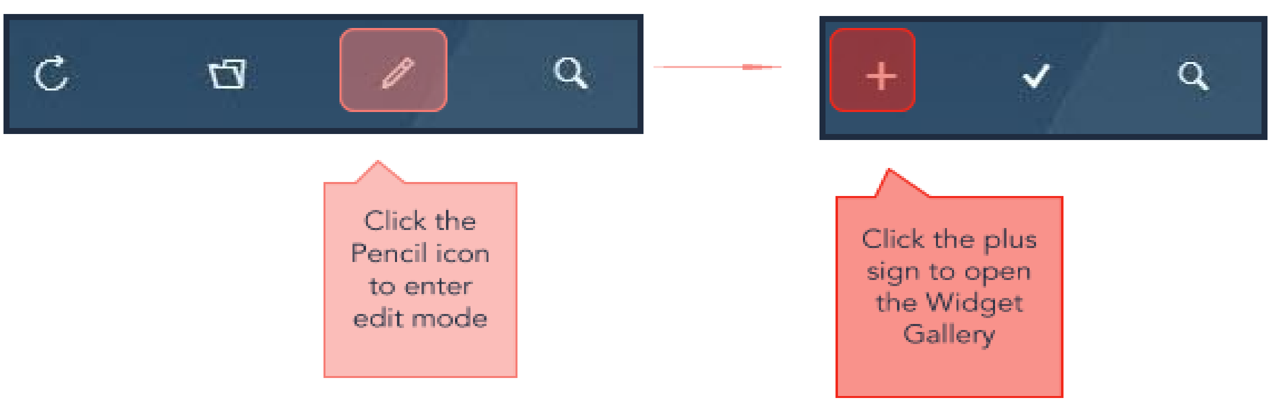
My Recent Updates - shows a running list of your recently added or edited documents and records.

Business Object Count widgets like My Purchase Orders Not Received, tally and allow quick access to certain open documents.

Messages and Alerts - an inbox of internal messages and alerts.

Widget Gallery

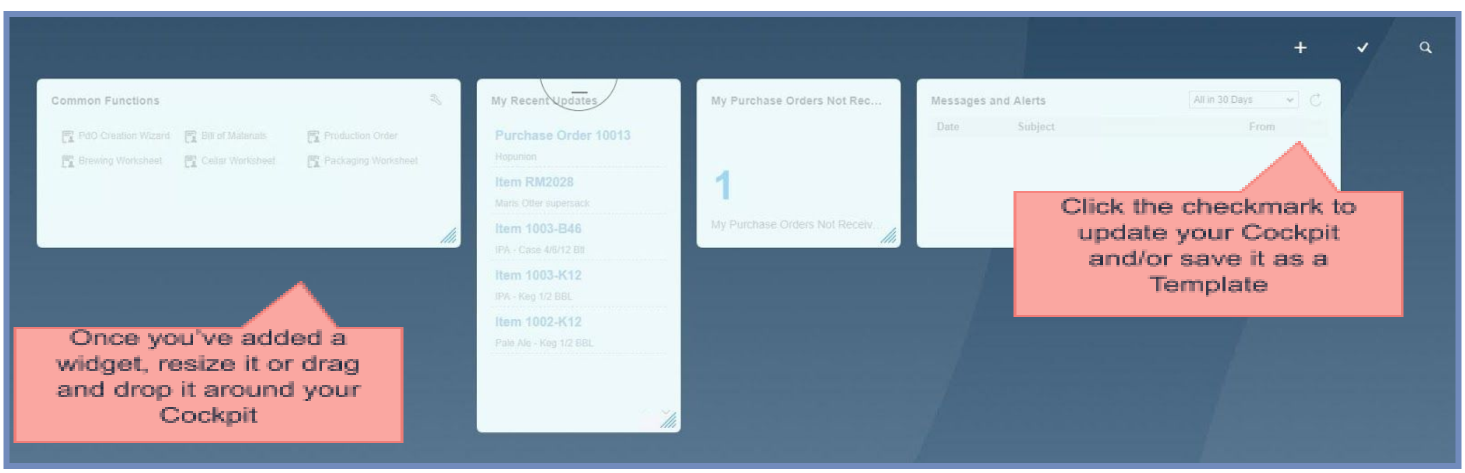
The Cockpit can be customized through the Widget Gallery.



Click the dropdown to navigate through the gallery

Use the search bar to find a specific widget

Click the plus sign to add the widget to your Cockpit

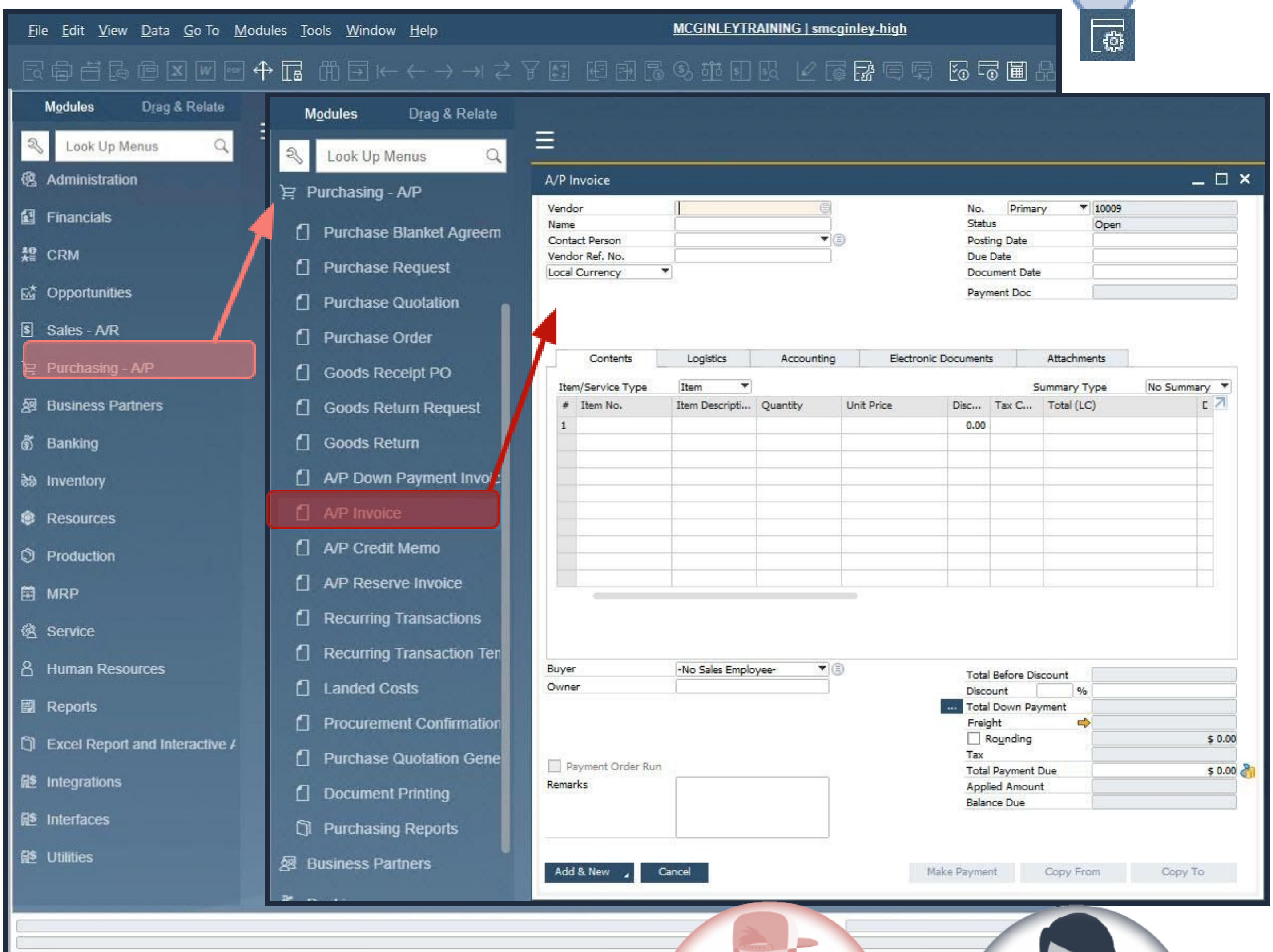


Modules & Functions

Modules: Groups of documents, functions, and reports. Organized by department

Interface Tip!

Within an open function, you can customize your view! This is done with the form settings tool!



Real Life: When Bruno the Brewer logs in to Orchestrated, he'll *probably* just be interested in functions located within the **Production** Module. Penny in accounting will be working primarily in the **Financials** module.

Core functionality

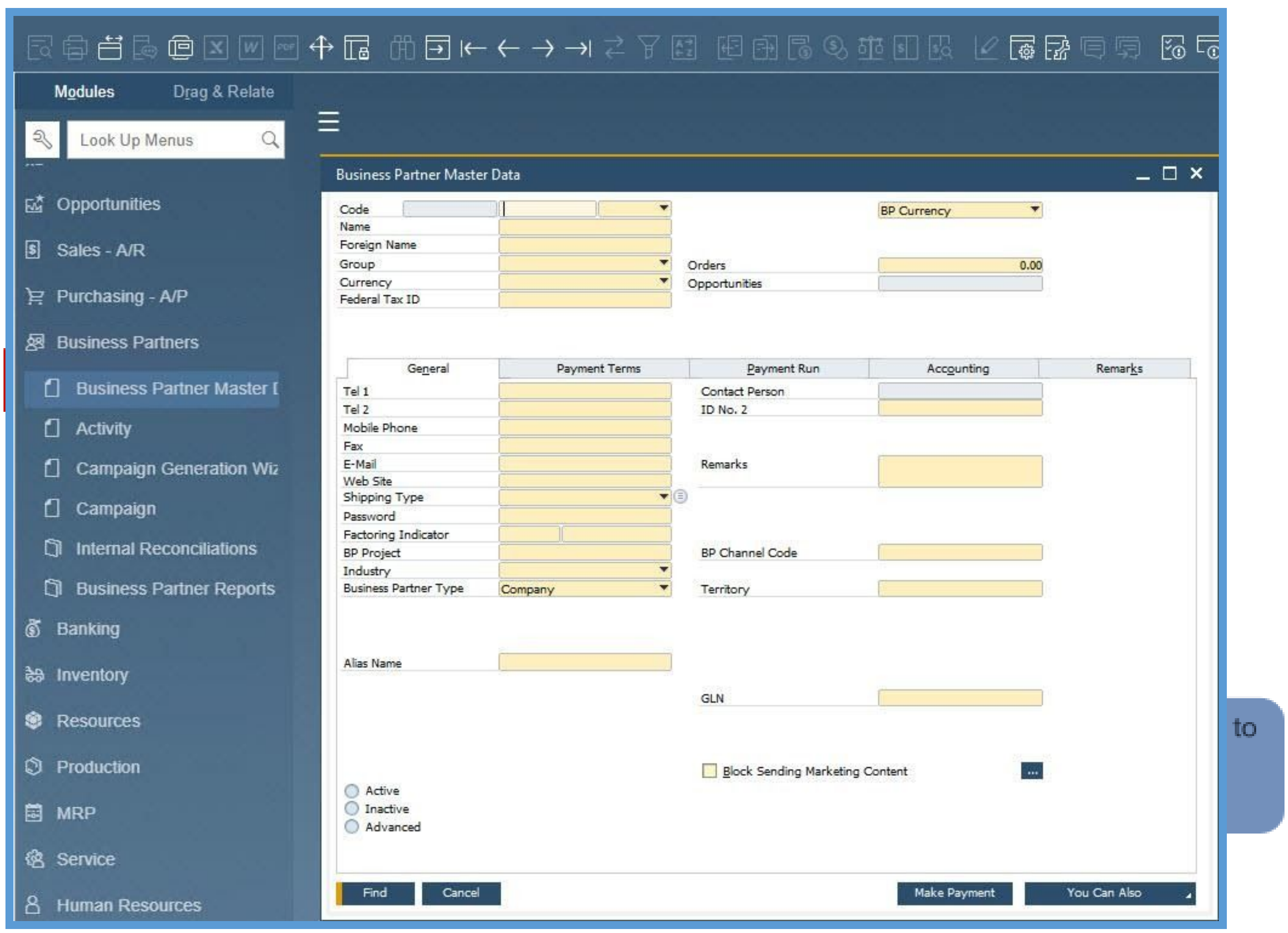
Core master data

To better manage the daily business, your business partners and inventoried items will be set up as master data records. This information becomes the default data for purchasing, production and sales & inventory transactions. A master data record is created for each product and identified with a unique code. Each master for an item/business partner will store essential information such as business partner contact information, payment terms, if an item is purchased or sold, the price of the item and the inventory level. This data is used automatically by the system for all phases of our cycle: Purchasing | Production | Sales | Financials.

Business Partner Master Data

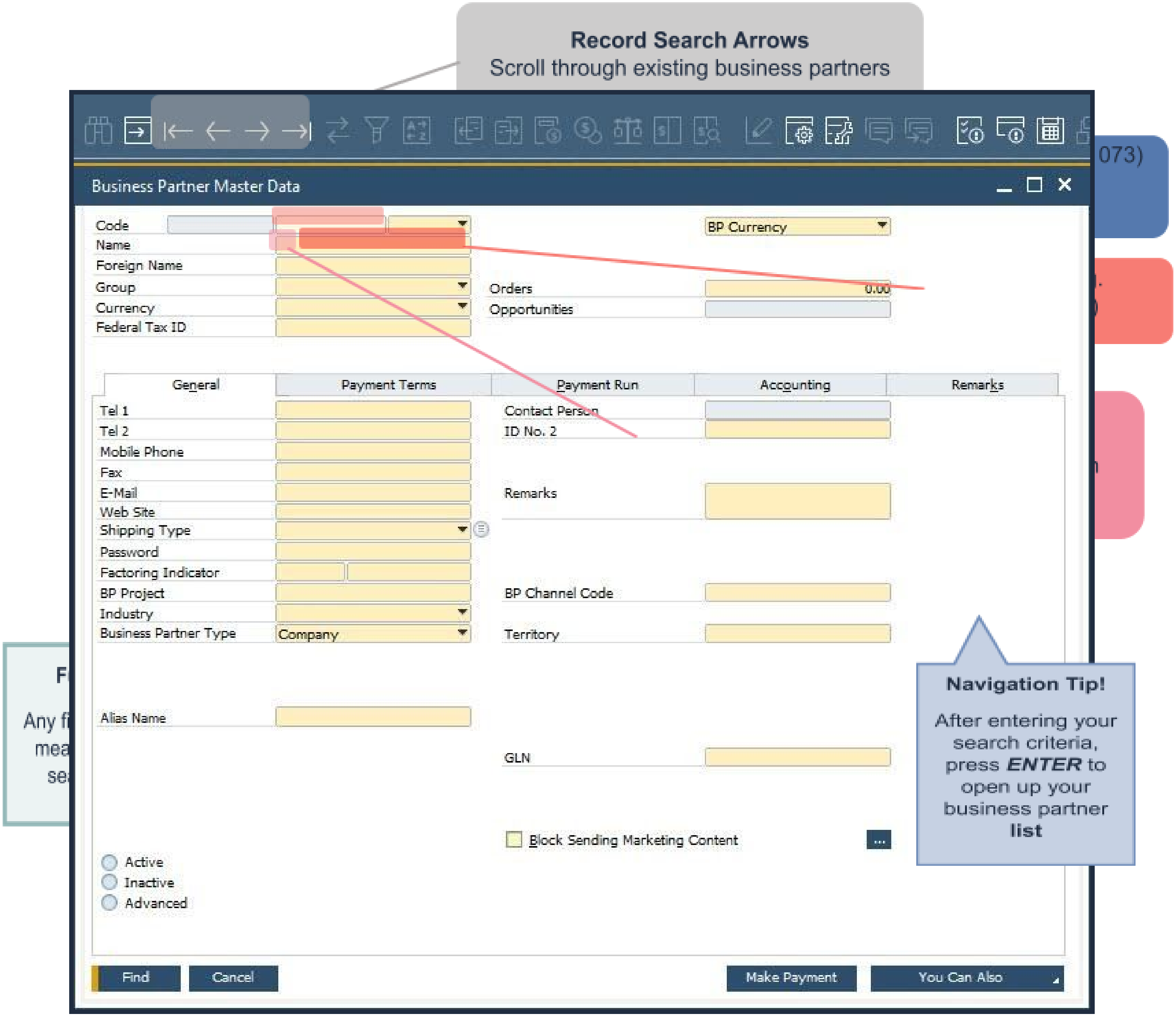
This is your master data stored for all vendors and customers

Modules > Business Partners > Business Partner Master Data

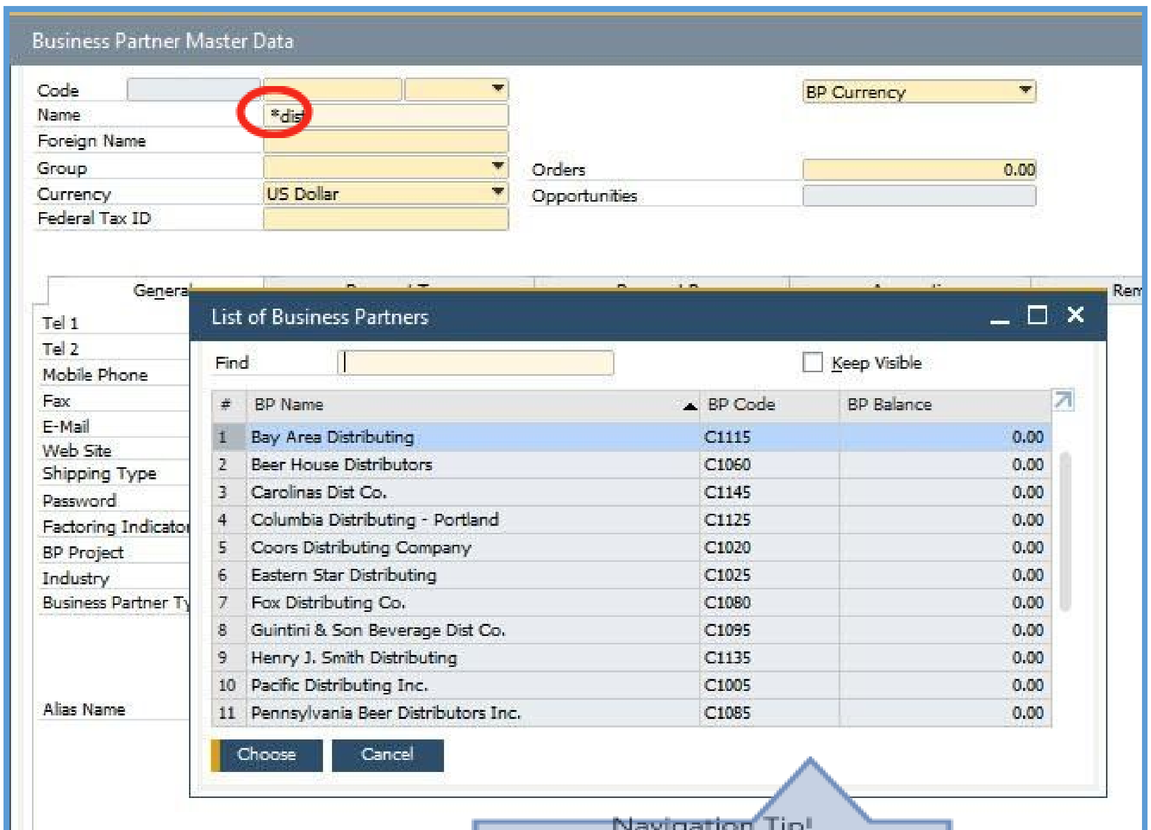


How to find/search Business Partner Master Data (Ctrl F)

To find a particular business partner



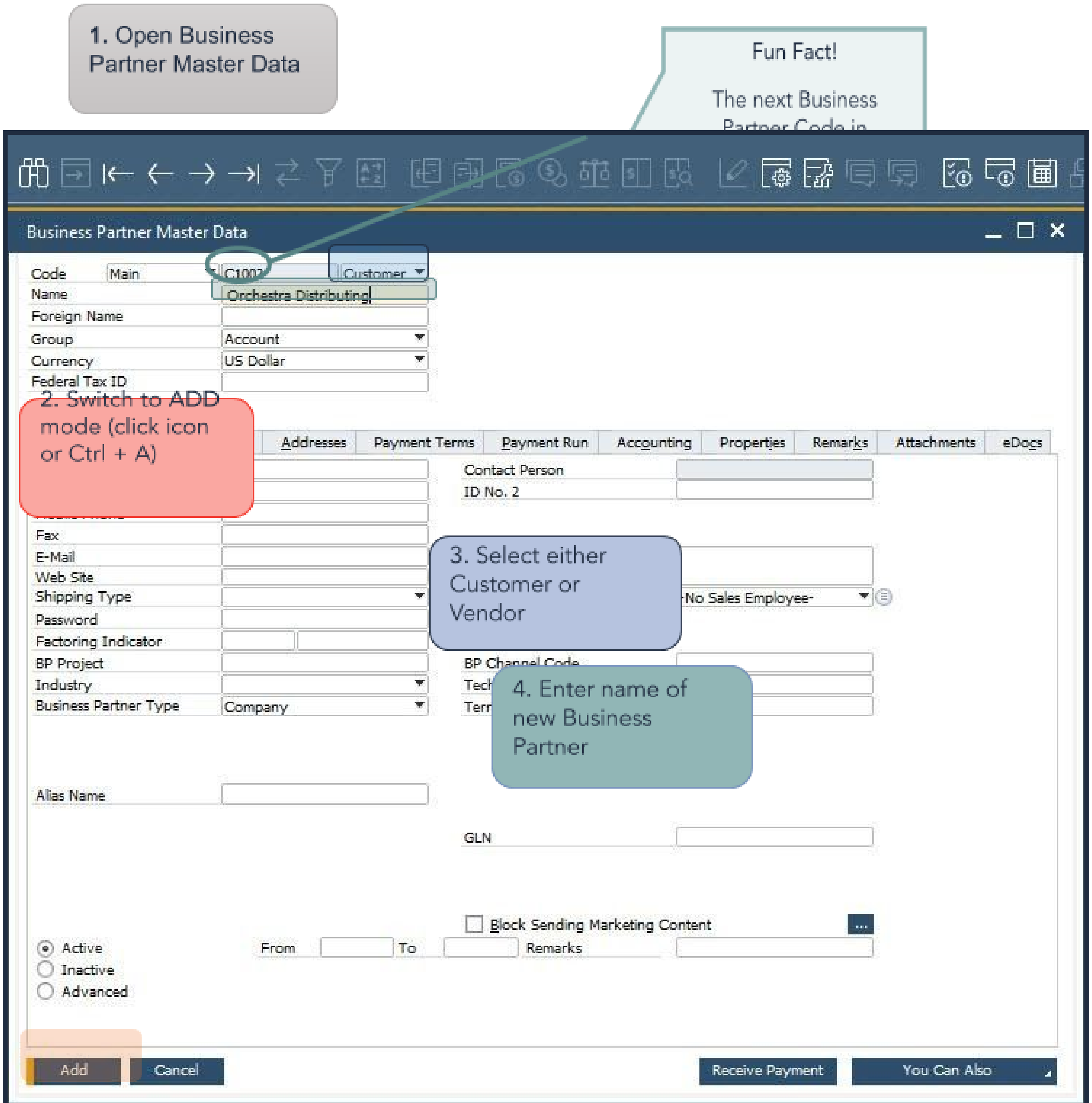
Real Life: Peter needs to search for his distributors. He decides to search using the WILDCARD!



Navigation Tip!

If you're searching through a list within Orchestrated, you can double click the heading to sort from top to bottom, or bottom to top.

How to add Business Partner Master Data (Ctrl A)



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5. Ensure the following fields are filled out in order to successfully complete BP addition:

If adding a new Customer:

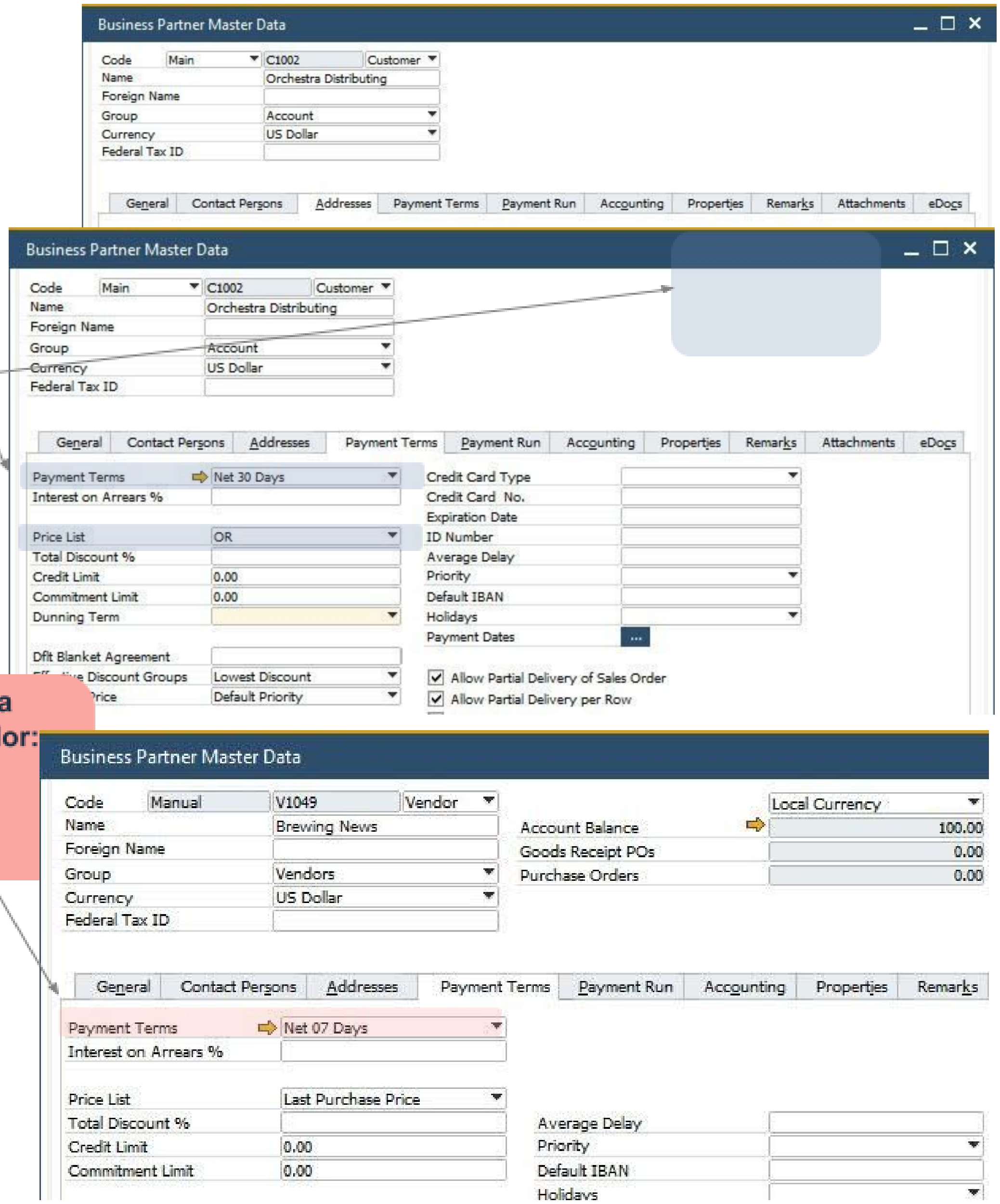
Ship to Address

Payment Terms

Price List

If adding a new Vendor:

Payment Terms

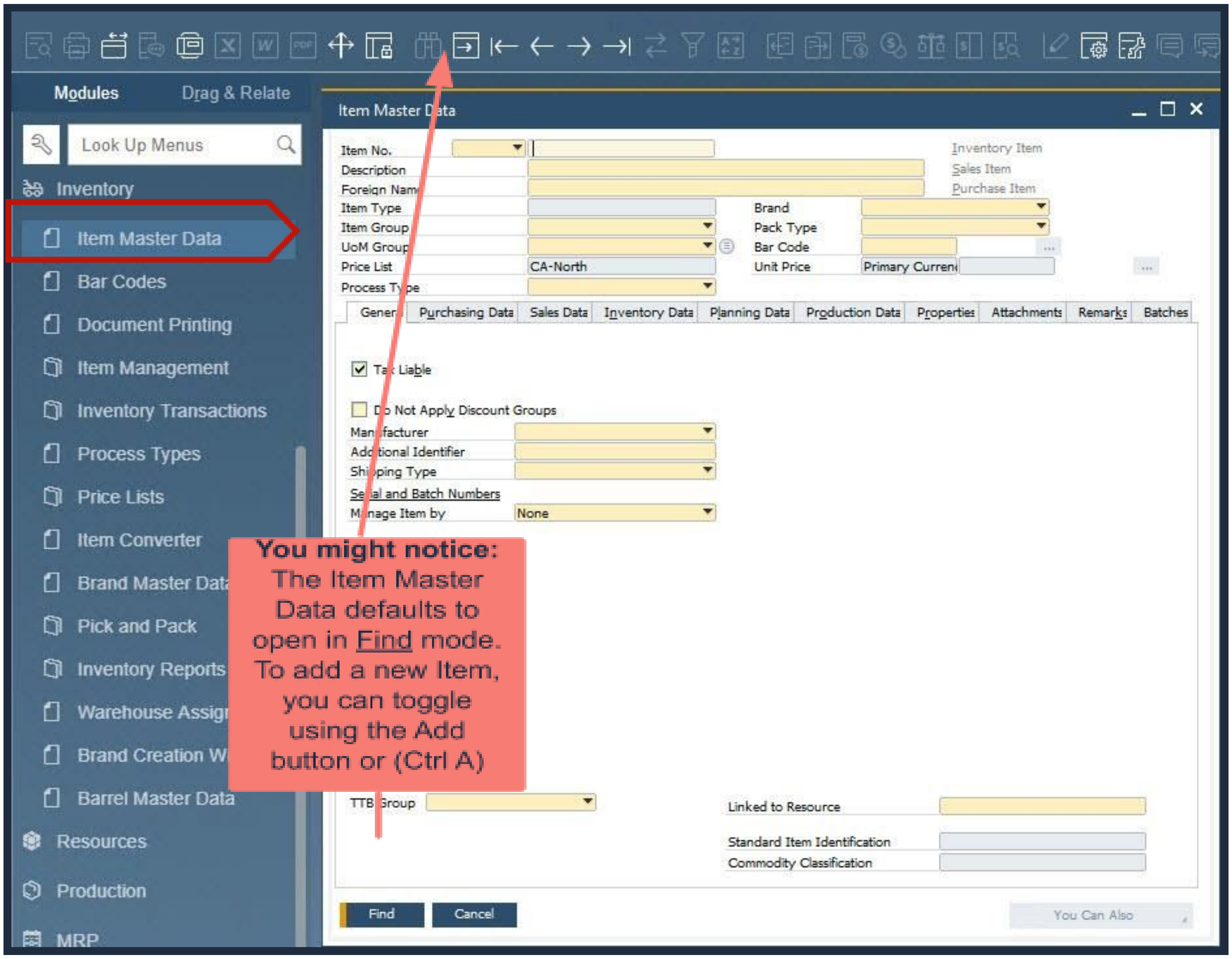


6. Click Add!

Item Master Data

Master Data stored for all your inventoried items that you track (anything you want to buy, produce or sell)

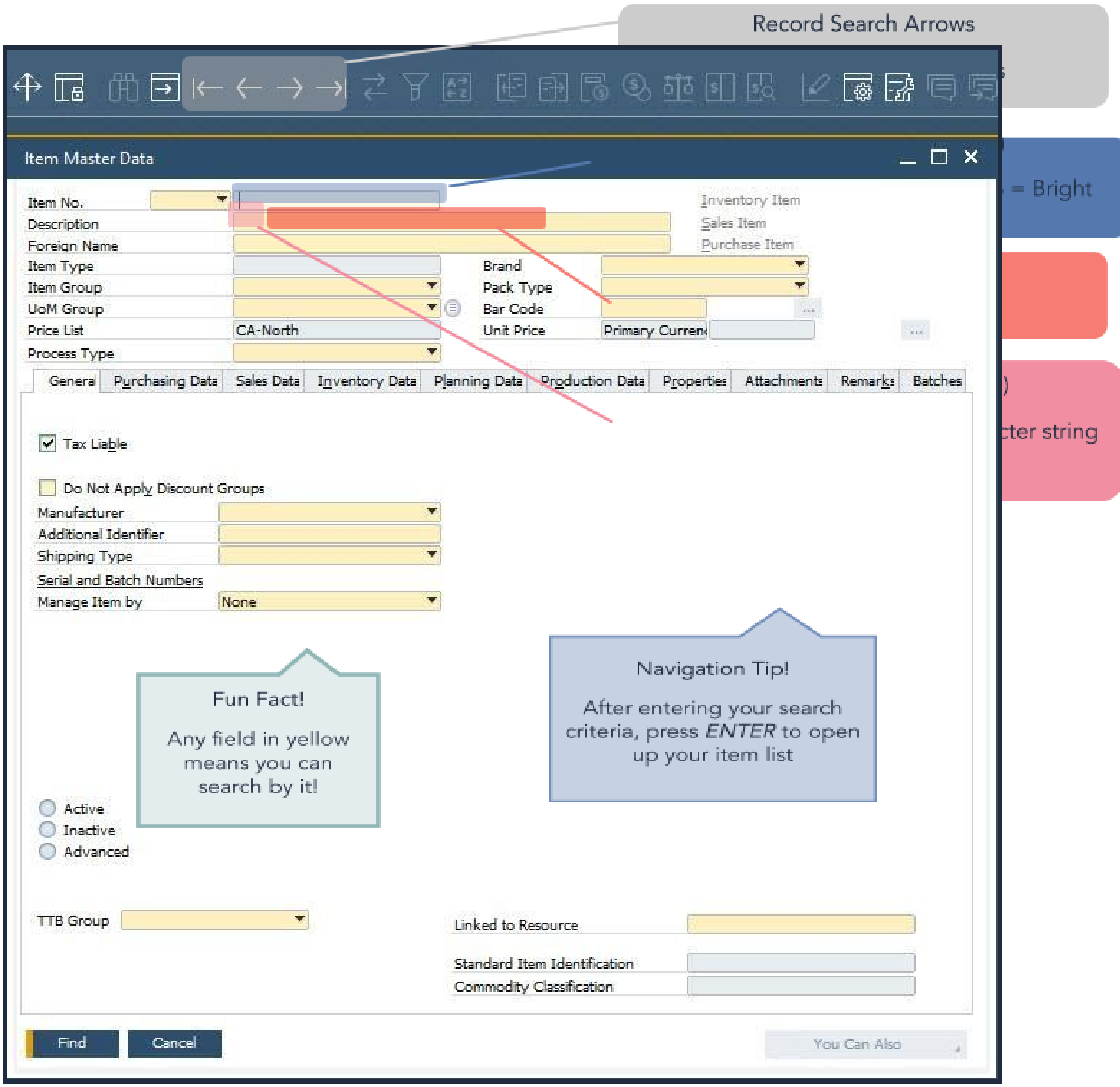
Modules > Inventory > Item Master Data



Item Master Data is a very common function, if you haven't already, go ahead and add it to your common functions box in the cockpit!

How to find/search Item Master Data (Ctrl F)

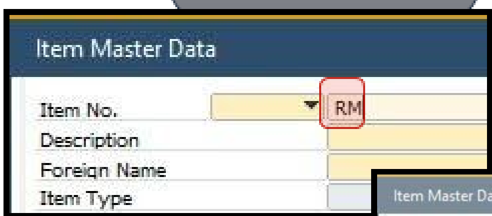
To find a particular item, there are 4 main search



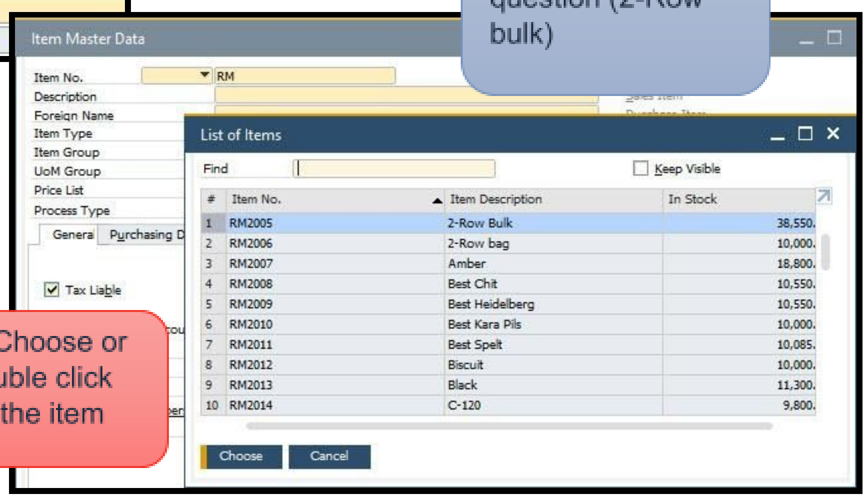
Real Life: Peter now needs to check on details and the inventory level of his bulk 2-row malt. Let's see how he goes about finding it!

1. Open Item Master Data

2. Enter 'RM' to expand list of all "Raw Material – Malts"



3. Highlight the type of malt in question (2-Row bulk)



4. Choose or double click on the item

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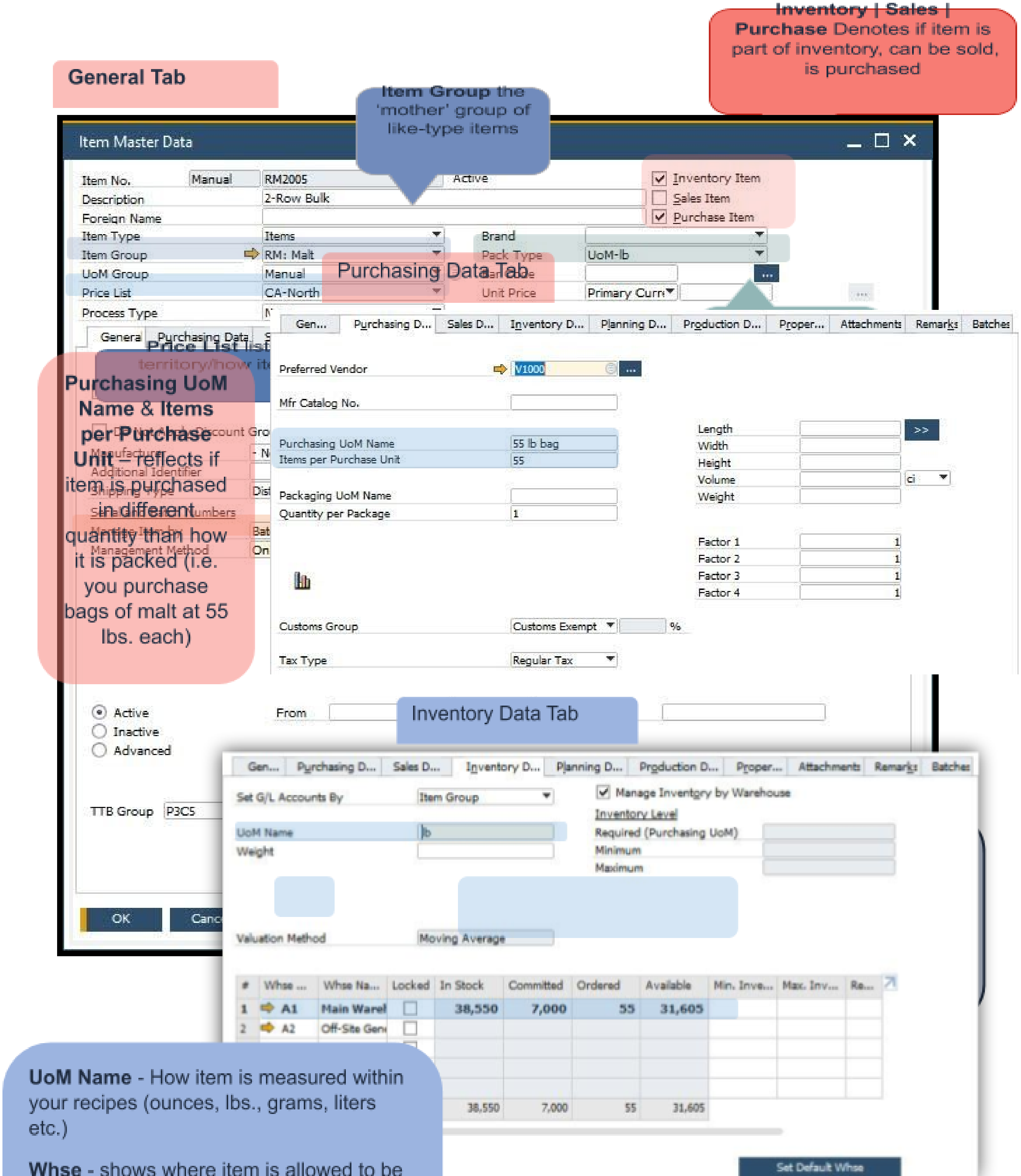
5. Review specifics on the item by looking through the tabs:

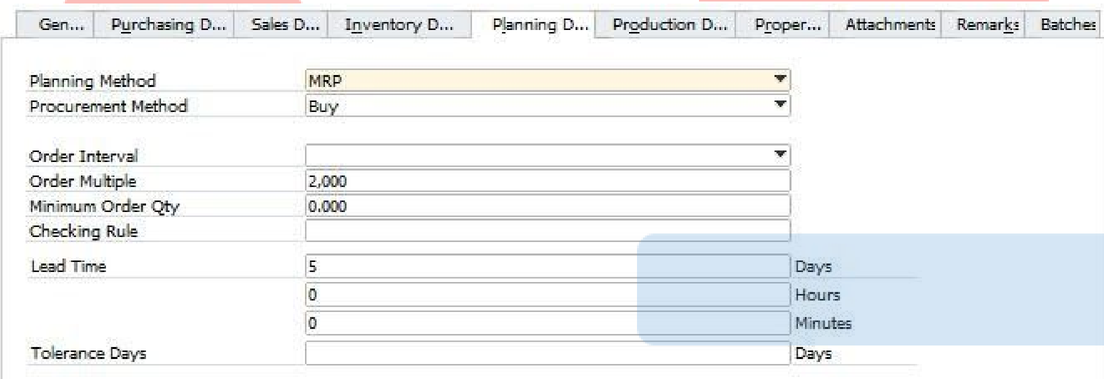


UoM Name - How item is measured within your recipes (ounces, lbs., grams, liters etc.)

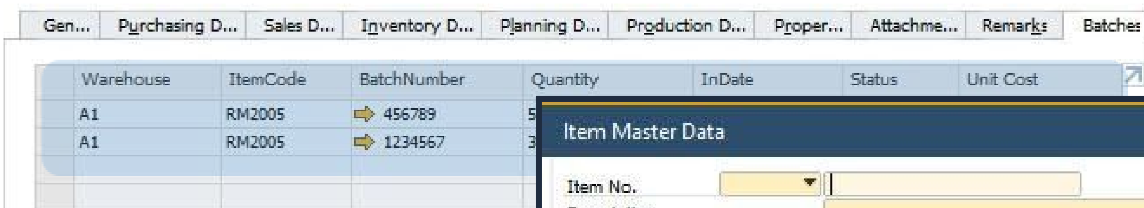
Whse - shows where item is allowed to be located (warehouses)

Reflects item amounts **In Stock**, **Committed**, **Ordered** and how much is

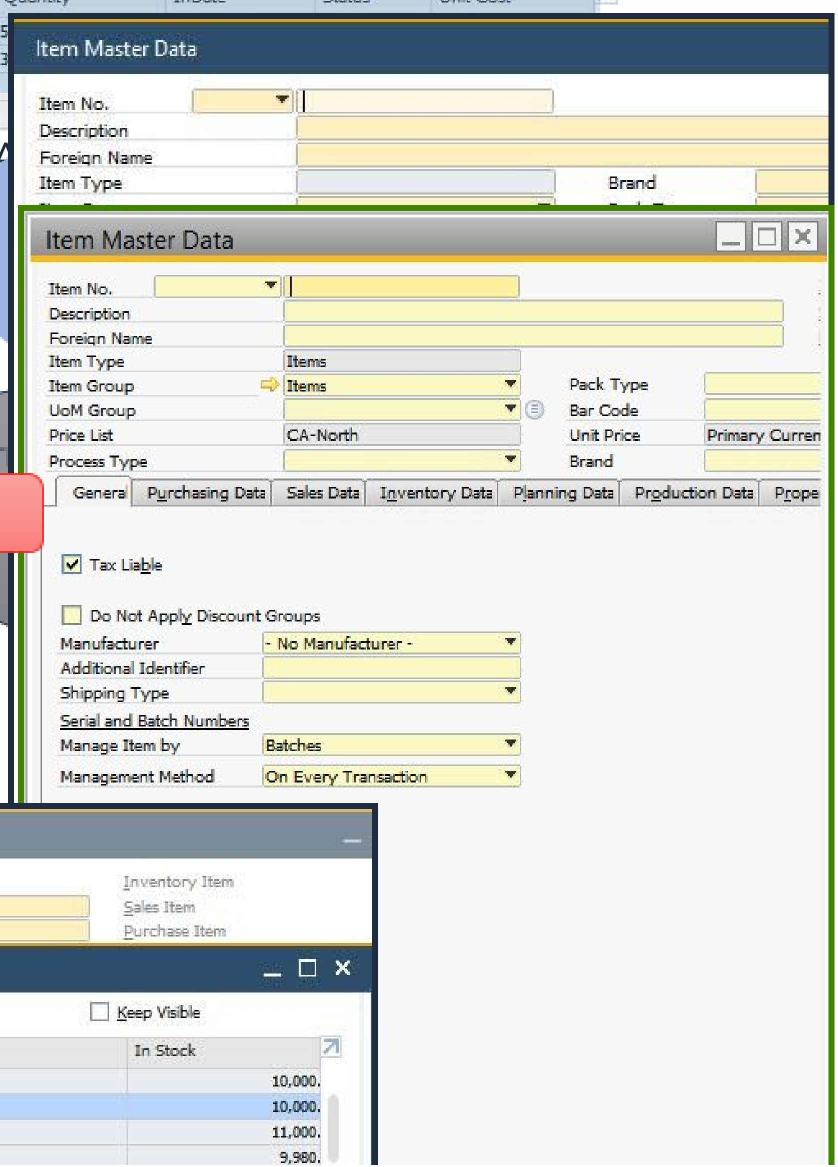
Planning Data Tab



Batches Tab



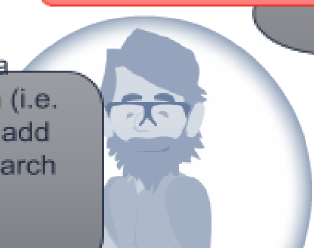
How to add Item Master Data (Ctrl A

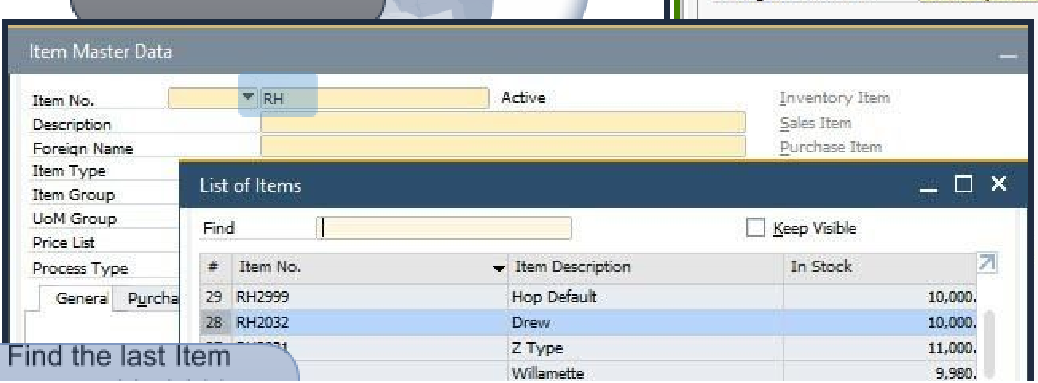


1. Open Item Master Data

2. Stay in **FIND** mode

3. Search for a 'like-type' item (i.e. if you need to add a new hop, search for '**RH**')





4. Find the last Item

5. Double click item to populate (i.e. '**RH5032** – Hops – Drew')