Summary

Sometimes requested changes to a new or existing report or layout fall outside the realms of the Orchestra Support Team.

When this happens and it isn't possible for Support to make the changes you've requested directly, there are two avenues you can pursue:

Option 1: Post Your Request on the 'Ideas' Page

Oftentimes, the changes that you'd like to see made to a specific report or layout would be helpful to other members of the Orchestrated community as well.

When you post a suggestion on the 'Ideas' page, other members of the community can show support for your idea by voting on it. Our Product Manager directly monitors this page and uses the ideas that are most important to the community to help determine what will be implemented in future releases of Orchestrated.

You can access the 'Ideas' page via the 'Ideas' tile on the homepage of the Orchestrated Help Center:
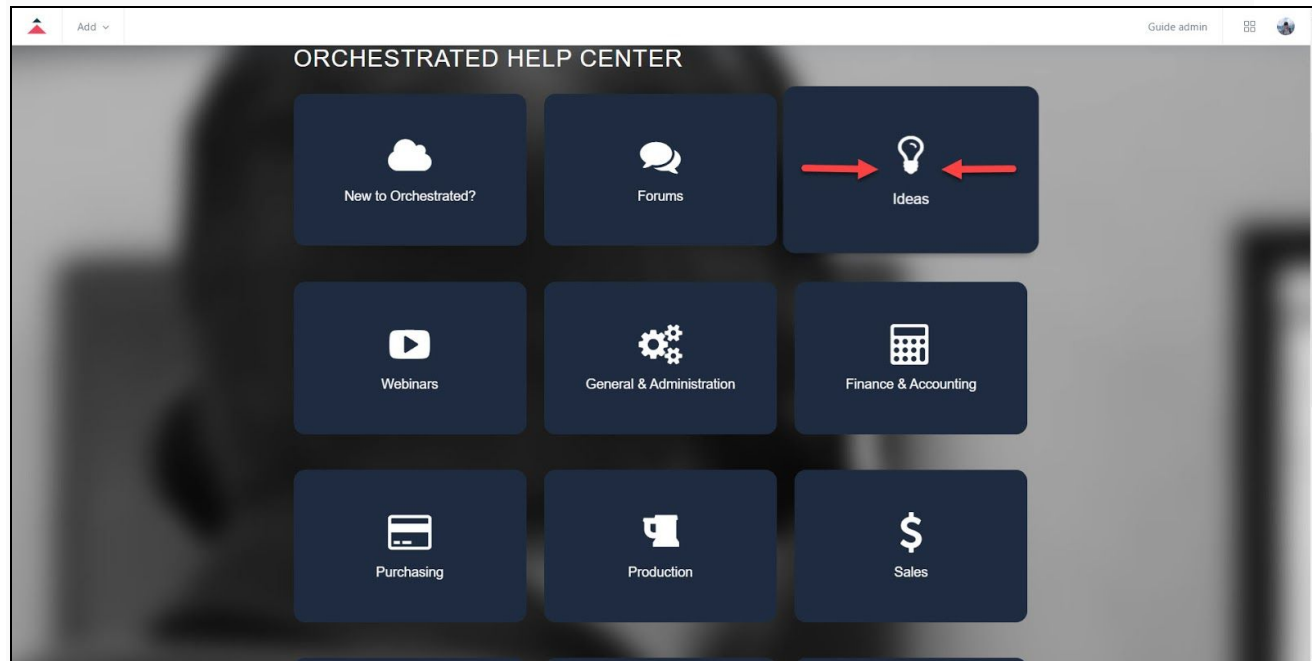
Option 2: Pursue Customization

Sometimes the changes that you've requested to a report or layout are needed as soon as possible and you would rather not wait to see if the changes are addressed in a future release of Orchestrated.

If you indicate to the Support team that you'd like to pursue customization, your request will be forwarded onto our Solutions Team and Account Management to determine the time and materials required to make the requested changes.

Due to the nature of work within the Solutions Team and Account Management, these customized edits often take significantly more time to complete than an average Support Ticket.

To help expedite the process, before forwarding your request outside of Support, you'll be requested to provide the Support Team with a visual example of the changes you'd like made.

What you'll want to do is print out a report that most closely resembles the finished report that you'd like customized. You'll then mark it up to show the changes that you'd like made. This might include circling fields that you want more decimal places shown for or crossing out columns that you want to delete. This markup can be done manually or by using editing software applied to a screenshot.

An example is included below:

In the example above, there are 4 edits requested to the 'Item Production Activity Summary' report:

1. Arrows, boxes, and text indicate that there should be a leading column for the item codes and that those item codes should be sorted numerically.
2. This is a request to add a column called: 'In Stock as of End Date'. The associated text details the need for a column that shows the in stock quantity on the end date out to one decimal place.
3. The 'In Planned Status' column is no longer needed and should be deleted. This is indicated with an 'X'
4. Finally, for the three remaining pre-existing columns, the values should report to one instead of two decimal places.

Being able to provide a visual representation of the end goal provides the Solutions Team with the clearest picture of what you'd like done and helps expedite the initial evaluation of the project.

Once the Support Team has your visual representation of the customized report, they'll then forward your request onto the appropriate teams to evaluate the cost of the customized work. Those teams will then contact you directly about the next steps in the customization process.