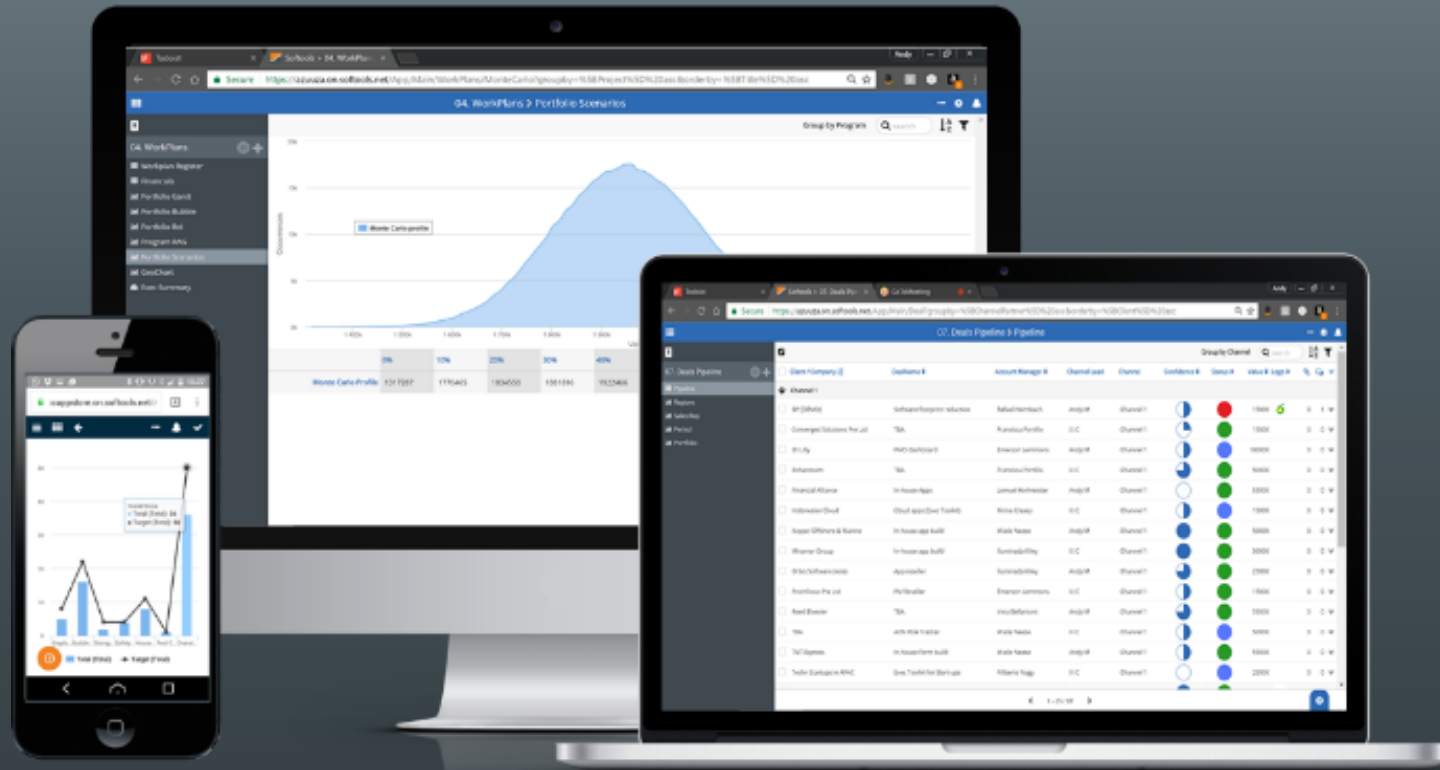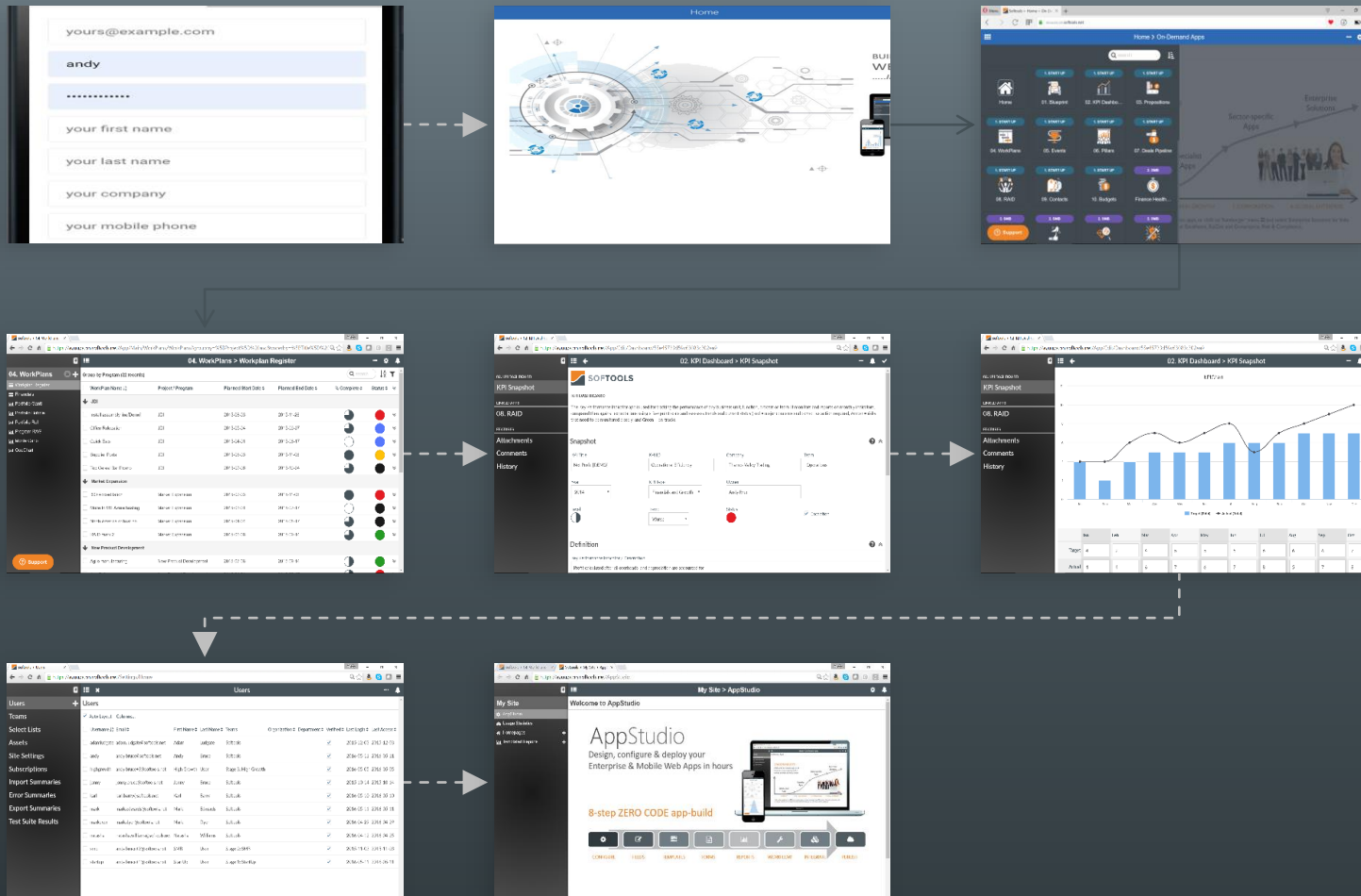# APPLICATION PORTAL

SOFTOOLS

USER GUIDE
www.Softools.net

# USER GUIDE OVERVIEW



A. User Log-in

B. Navigation

C. App Launchpad

D. List Reports

E. Data Input

F. Charts & Dashboards

G. System Admin & App Studio

H. Extras

# USER LOG-IN

## FIST TIME LOG-IN

Use a modern browser (Chrome, Edge, Safari) to access the URL: xxxx.on.Softools.net

*Update to latest browser version if asked*

+ Go to Sign-up page and enter details

+ Go to your email and confirm your account (check spam)

+ Bookmark the page / add to mobile homepage

### Sign Up

Log In        Sign Up

yours@example.com

andy

.............

your first name

your last name

your company

your mobile phone

your code

By signing up, you agree to our terms of service and privacy policy.

SIGN UP >

Use Sign-up forsetting up your account

Your company email address

Your user name – 8 characters & no spaces

Your password – don't forget it!

Your first name

Your last or family name

Your company

Your mobile number

Use the code given to you

SOFTOOLS

3

# LANDING PAGE

## KEY POINTS

"Softools is a web platform that allows simple and complex apps to be built and deployed in hours with zero code"

+ Softools runs in a secure and scalable cloud

+ Security determines what records you can see

+ Permissions will determine what you can do

+ New sites set up in minutes

+ The platform runs on any device

+ Apps run online & offline

## SCREENSHOT



SOFTOOLS

# SYSTEM NAVIGATION – OVERVIEW

## KEY POINTS

'Hamburger' opens and closes the menu

Launchpad gives quick access to apps

Home takes you back to the landing page

Ellipsis menu gives access to screen-specific features

Cogs menu gives access to common features

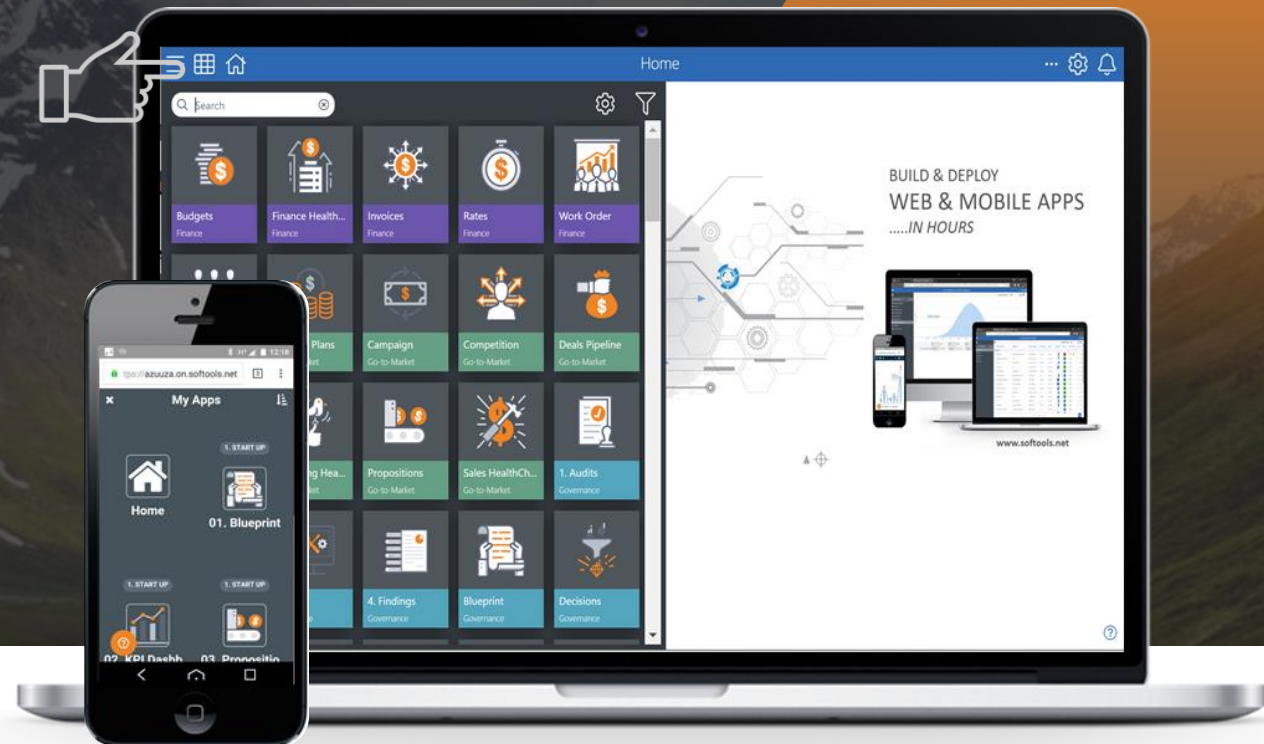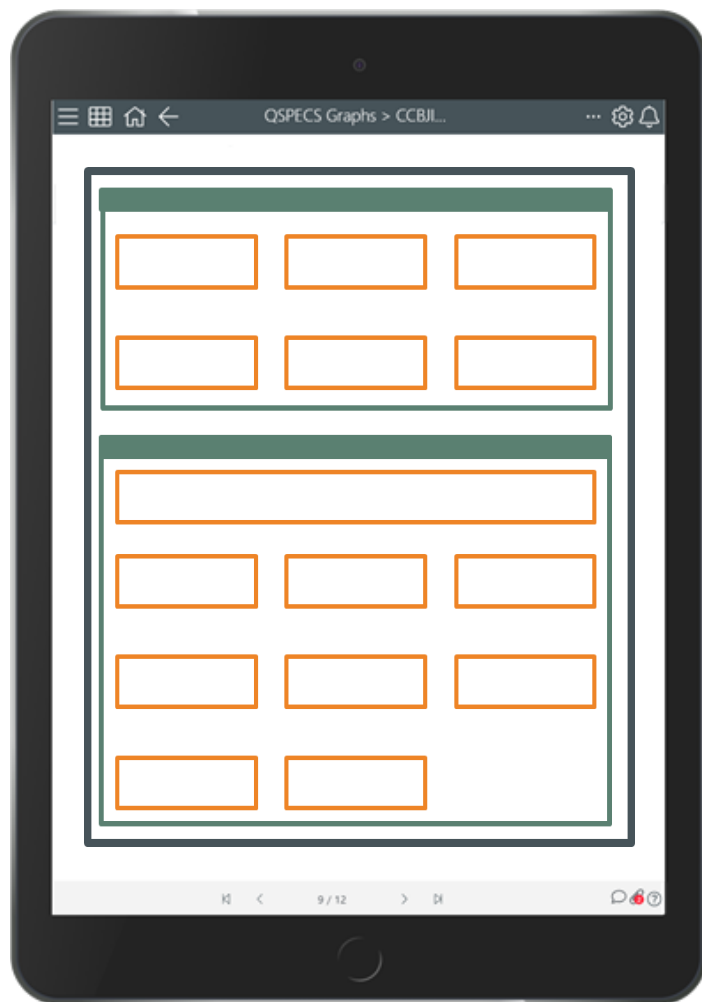Bell icon shows notifications

## SCREENSHOT



SOFTOOLS

# APP LAUNCHPAD

## KEY POINTS

+ The Launchpad provides Quick access to your apps

+ Hover over each App icon for a description

+ Click on the App icon to launch the app

+ Note: Other apps are available on request

## SCREENSHOT

# APP BUILDING BLOCKS

SOFTOOLS



## FIELDS
Capture data either via direct manual input (keyboard or voice), via csv import / export routines or via automatic system routines using APIs.

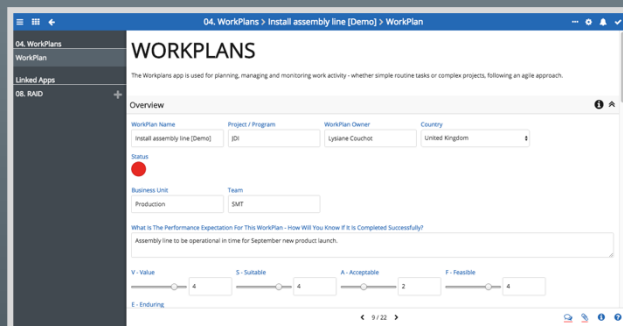Fields vary depending on the type of data being captured – a full list is at the back of this pack

## TEMPLATES
Group the data input Fields in a logical and user-friendly layout.  These contain Help that guides users through the app
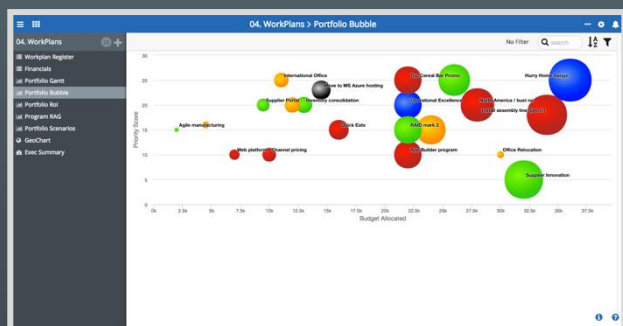
## FORMS
Complex apps use multiple Forms to group Templates into a logical flow that reflects the business process

# APP BUILDING BLOCKS



### RECORDS – DATA IN
Forms are filled in by Users and each one becomes a **Record**. A Record is the generic name for a single instance of any App – whether it be a Project, a Risk or perhaps a Deal.

### REPORTS & CHARTS – DATA OUT
Data from multiple Records is then used to generate elegant **Reports** which gives an overview of the portfolio of records or performance.

### APPS
All of these parts as a whole then become **Apps**!

# REPORT LIST OF RECORDS

## KEY POINTS

+ 1. Open an App by clicking on the icon in the Launchpad

+ Most apps will have a 'List Report' showing a register of records for the app

+ This is a standard view of your data and is used for accessing records and reviewing performance

+ Click on a row to go into the record

## SCREENSHOT

# REPORTS QUICK DATA INPUT



## KEY POINTS

+ 1. Open an App in your Launchpad

+ 2. Click on any list report by selecting the menu item

+ 3. Use the Filter or Search field to show only the records you want to edit

+ 4. Click on the button at the top left of the report to make the report 'editable'

+ 5. Update the values directly on this screen without opening any of the records

## SCREENSHOT
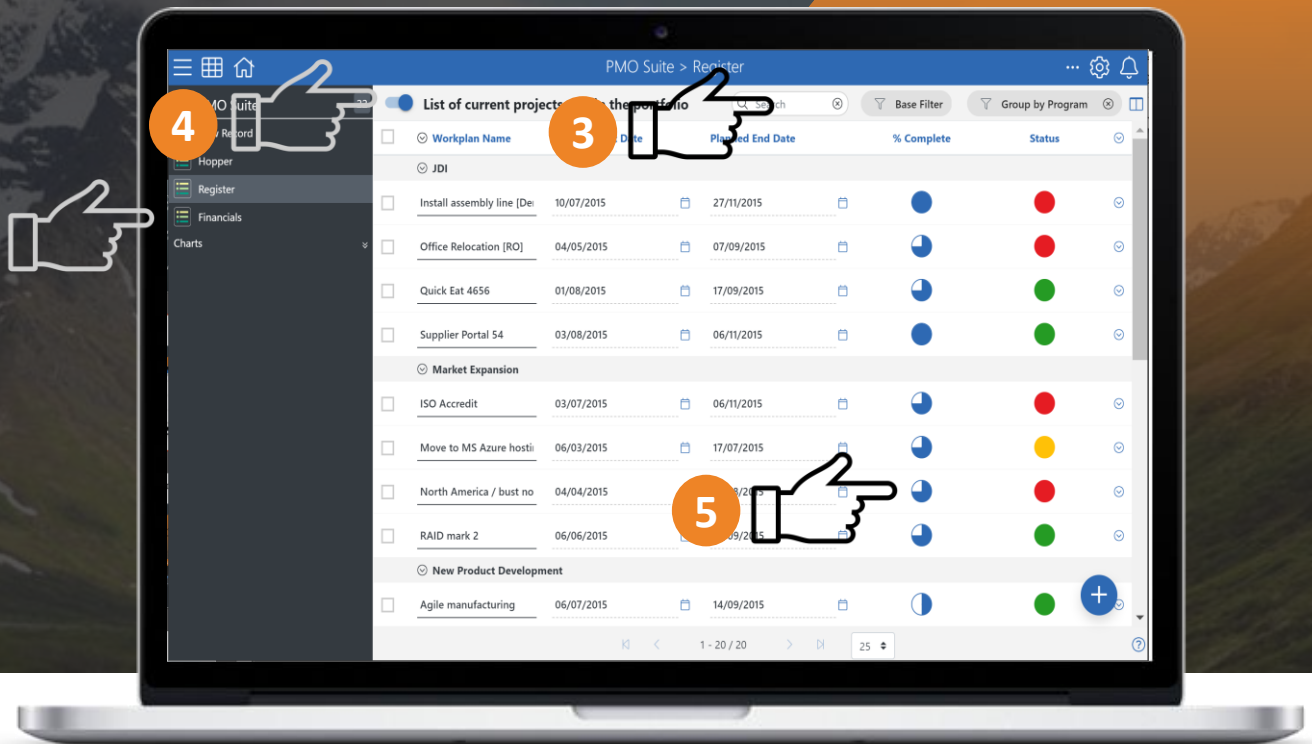
# RECORDS DATA INPUT
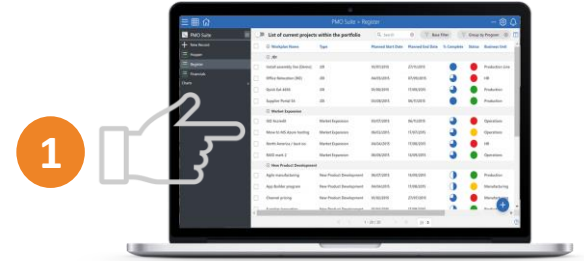


## KEY POINTS

+ 1. Open any record by clicking on the correct line in the list report

+ Data input fields are laid out in Templates & Forms in a logical flow to reflect the business process

+ Input fields will accept input in any language

+ Enter data manually, via csv import or via APIs

+ Note some fields will be locked because they are read-only or contain an expression where values are calculated automatically
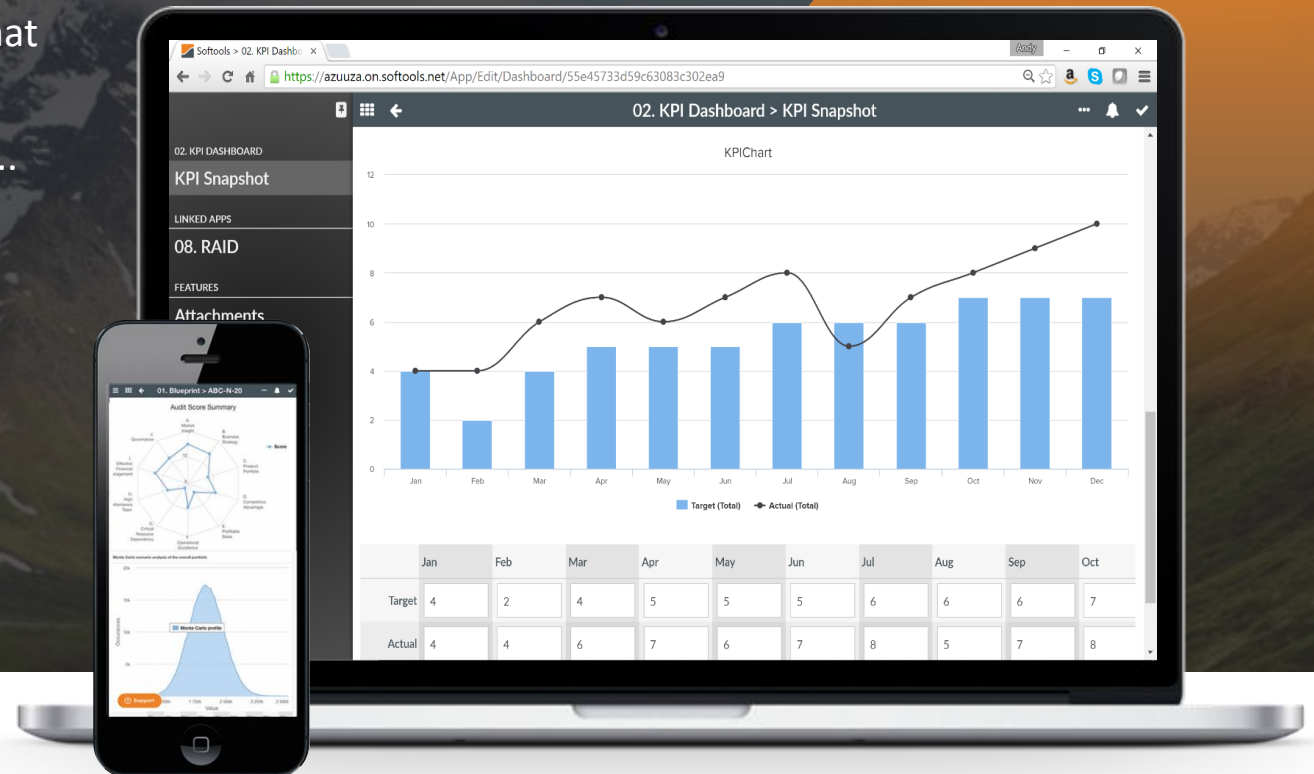
## SCREENSHOT
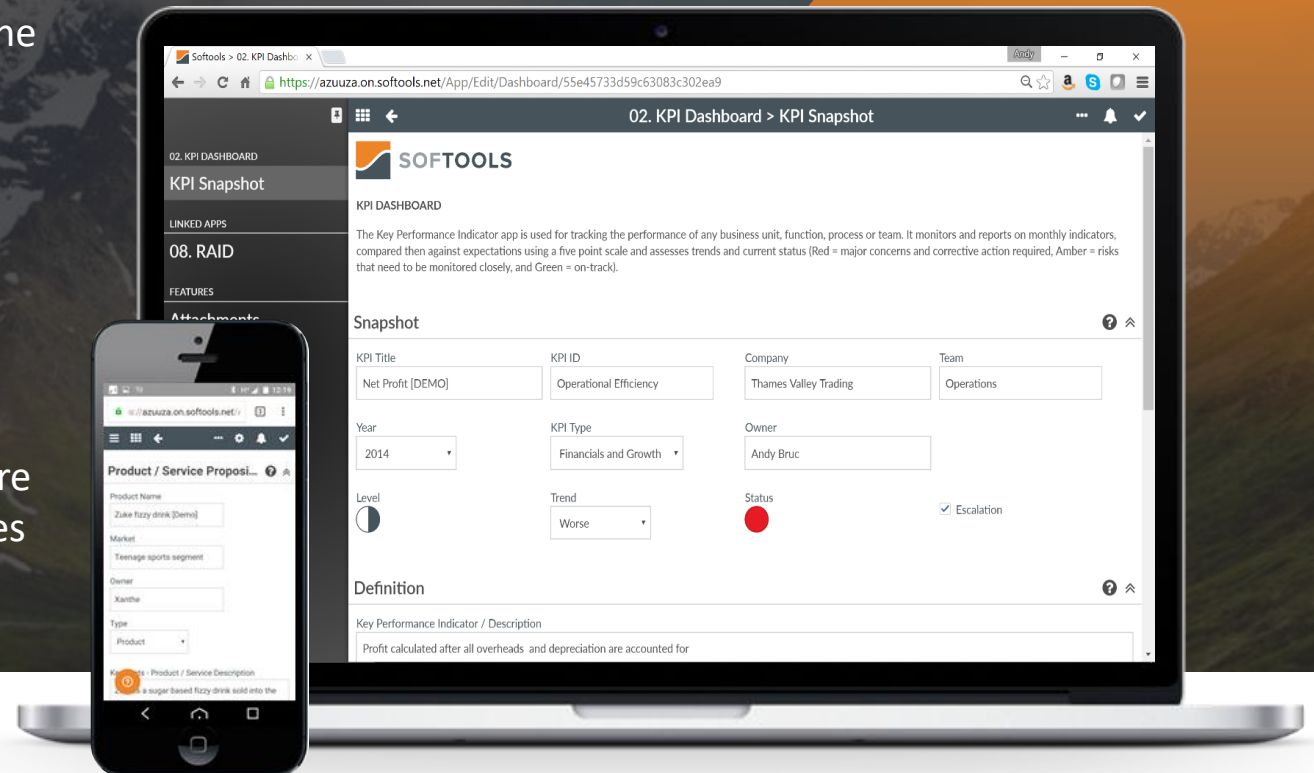
# RECORDS IN-APP CHARTS

## KEY POINTS

- Charts are views of the data in a graphical format

- There are many chart types including: bar, column, line, spline, bubble, pie, polar, matrix....

- In-App Charts are graphs inside a single record based on data contained in a data grid

- Most charts have zoom enabled to see more detail if required

## SCREENSHOT

SOFTOOLS

# CHARTS OVERVIEW

## KEY POINTS

+ Charts show values from multiple records

+ User the Flter to show only values from the records you want to see

+ Hover over data points to see more details

+ Click on legend to show / hide details

+ Note: most charts will allow you to click through to individual records

## SCREENSHOT

# DASHBOARDS & REPORTS

## KEY POINTS

+ Charts provide summary or portfolio level views or our data

+ Combine charts from different Apps to create Dashboards that will provide real-time Executive visibility & control

+ Note: Charts can also be based on data contained in other systems such as SAP

## SCREENSHOT
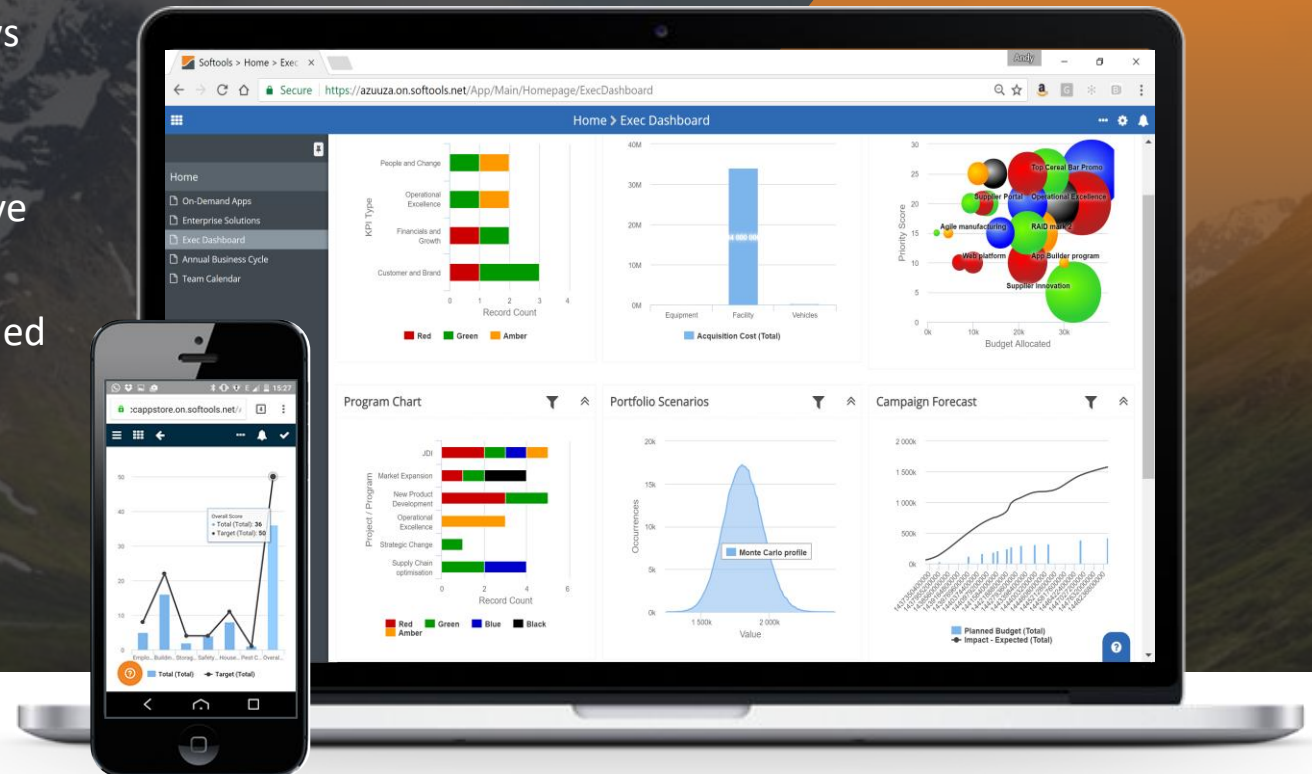
# COGS MENU



## KEY POINTS

1. The Cogs menu will differ depending on your permissions but you may have access to:

- My Profile. Click on the Cogs menu to access and update your profile. Note: your language setting will be based on the 'locale' of your browser

- Support (also available from the ? In the bottom right of your screen)

- App Studio (where you build apps)
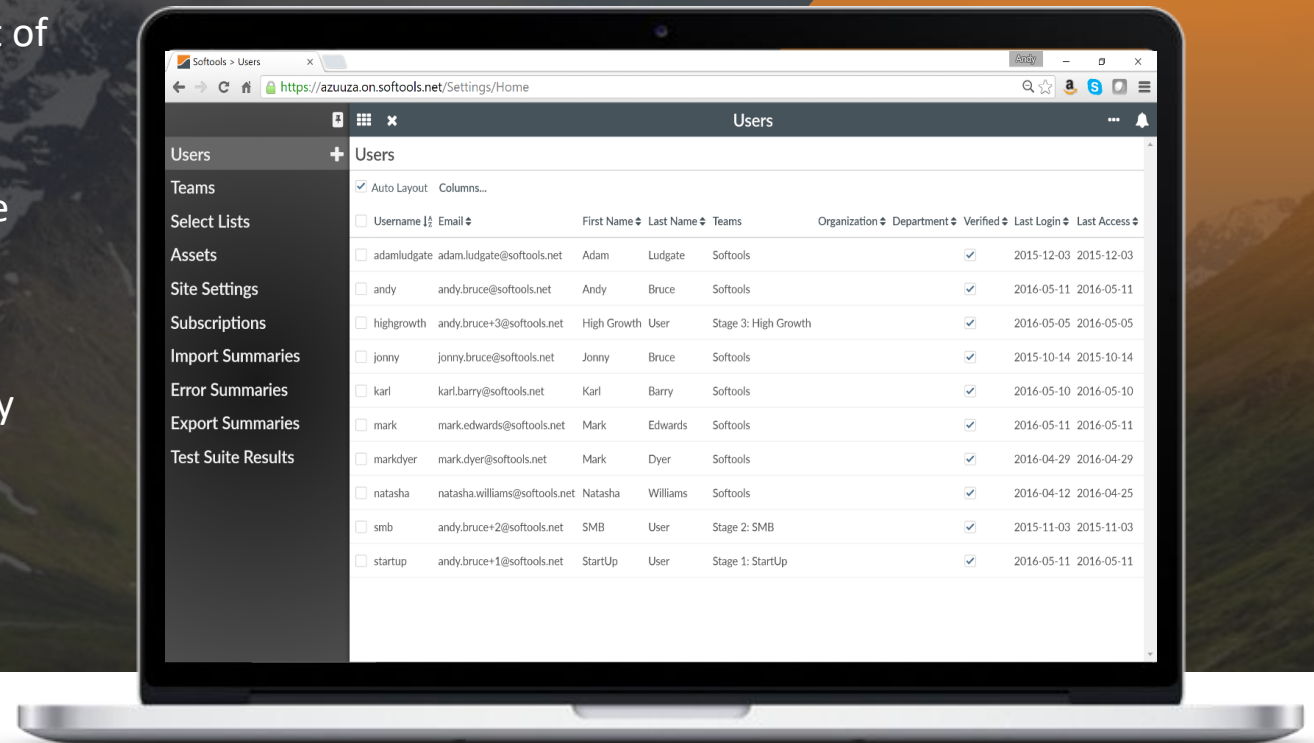
- Log-out

## SCREENSHOT

SOFTOOLS
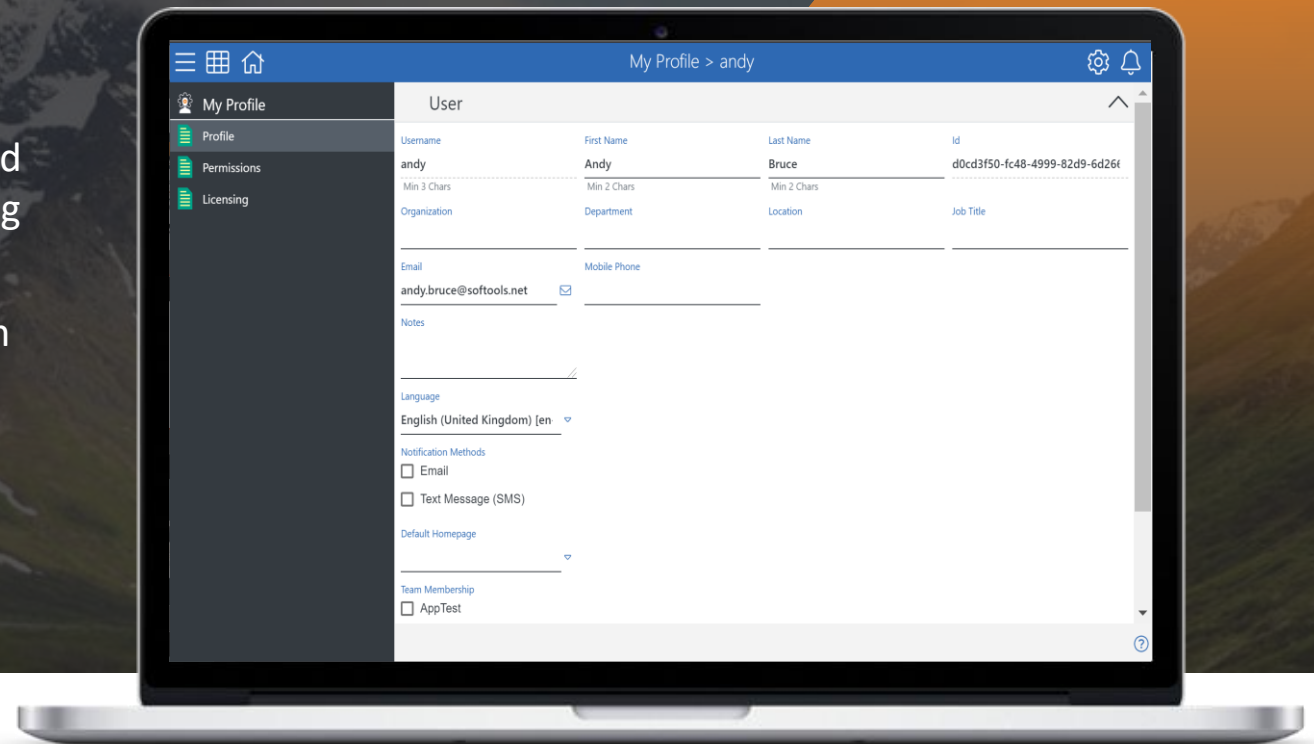
# SYSTEM ADMIN

## KEY POINTS

+ Clients Administrators can control every aspect of the Portal through the Settings and App Studio areas

+ The Settings area is where Teams and Users are set-up and controlled

+ Note: Users will only see options for which they have explicitly been given the necessary permissions

## SCREENSHOT

# APP STUDIO

## KEY POINTS

+ App Builders use the App Studio to design, configure and deploy apps

+ App Studio is also where Homepages / Dashboards and Export Templates defined

+ Apps can either be copied and modified or built from scratch with zero coding

+ More advanced Technical App Builders can also integrate applications with Enterprise Systems using APIs
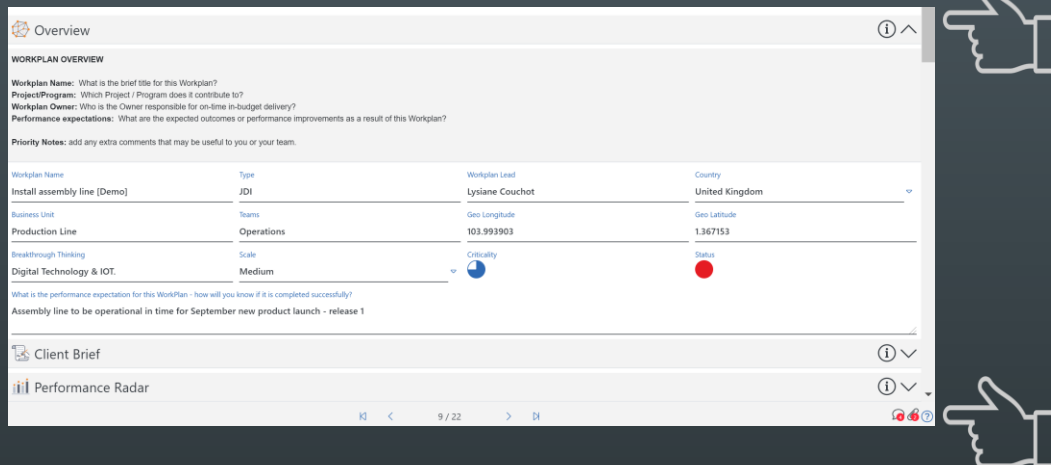
## SCREENSHOT



SOFTOOLS
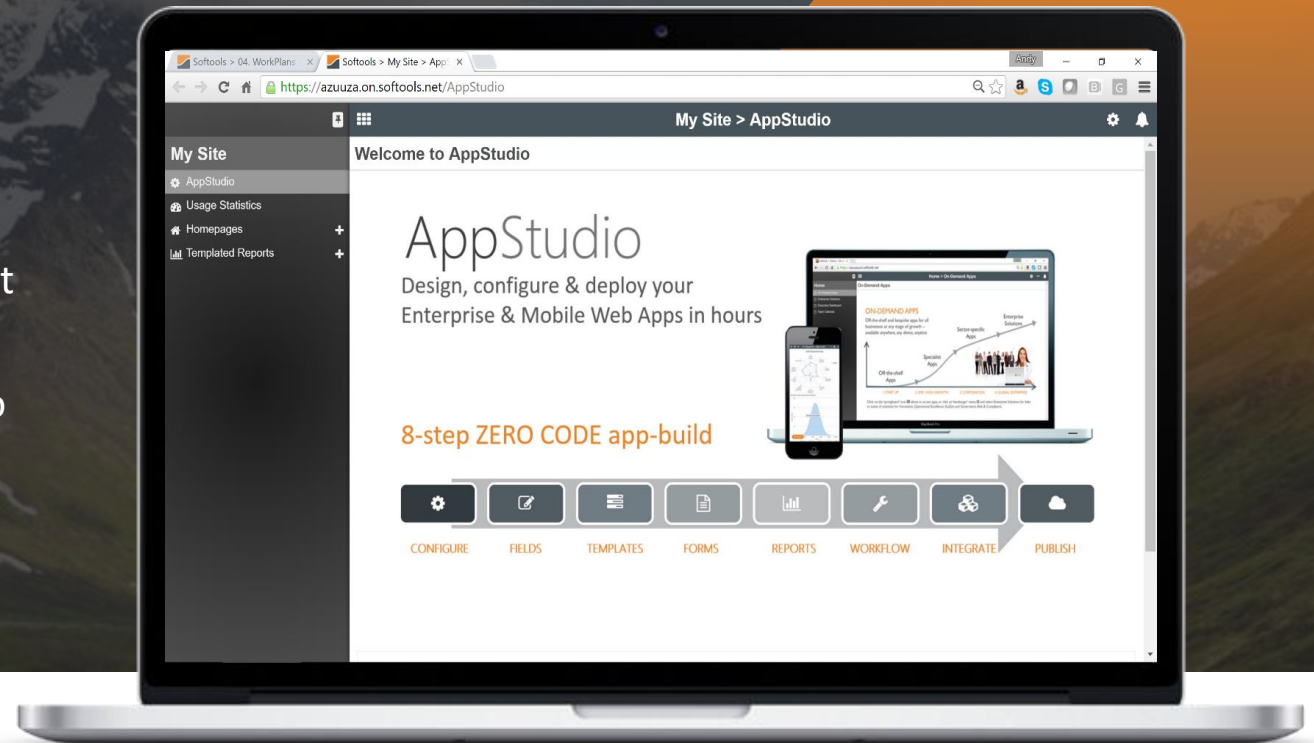
# GETTING HELP

## APP HELP

Support is available in each app in two areas:

- Every Template will have PROCESS help behind the 'i' icon in the top right of each Template

- SYSTEM help is available from the '?' in the bottom right of your screen



## WEB SUPPORT CENTRE

There is a lot of information online about all features in Softools.  Go to: https://support.softools.net



## YOUR KEY CONTACTS

For questions about your Apps and what is expected of you, please contact your System Administrators.

- XXXX

- XXXX

# EXTRAS

## ADDITIONAL INFORMATION FOR SYSTEM ADMINISTRATORS AND APP BUILDERS

| ICON | DESCRIPTION | ICON | DESCRIPTION |
|---|---|---|---|
| (hamburger) | Hamburger icon: show and hide the left hand menu bar. | (archive box) | Archived a record. |
| (three squares) | Screen menu: Access to record or report menu. | (copy) | Copy a record, create an identically record. |
| (grid) | Springboard menu: direct access to the apps and settings menu. | (bookmark) | Subscribe: subscribing to a record will update every time there is a change to the record via the notification feature. |
| (magnifying glass) | Magnifying glass: smart search. | (lock) | Security: determine which Users or Teams can access or edit a record. |
| (plus) | Plus: use to create a new record. | (cloud upload) | Upload files. |
| (home) | Home page button: This button takes you back to the home page of the site/app | (cog) | Cog: Menu where you can access to Settings, your Profile, AppStudio, Request an App and Log Off. This menu is accessible at a report app level. |
| (chevron down) | Drop down more information. | (paperclip) | Attachments: View a list of attachments such as documents, spreadsheets, pdf files or videos that are available for download. You can upload new attachments using the drag and drop functionality or the file search capability. |
| (filter) | Filter: allow a sub-set of records to be displayed in a preferred grouping. | (comment) | Comments: View comments added to a record and leave new comments for other users. This feature provides a useful chat room for all key stakeholders for the record to share ideas and notes. |
| (export) | Export: to export the data in either csv (Excel) or PDF format | (bell) | Notifications: Gives the user updates on bulk operations they are running, updates to records they are subscribed to and notification messages triggered by additional workflow. |
| (tag) | Tag: tagging a record associates one or more keyword to the record. | (columns) | Report Filtering: This is used for quick filtering a list report, you can select what fields you want to be seen on the report (Whether they are in the report or app) In Line Editing: Allows the user to update records from a List Report without the need to open each record individually. |
| (eye) | Show archived record. | (toggle) | In Line Editing: Allows the user to update records from a List Report without the need to open each record individually. |
| (eye slash) | Hide archived record. | (lightbulb) | Request an App: We have a wide selection of off the shelf apps available. If there is an additional app you would like then let us know and we can contact you to discuss further. |
| (refresh) | Refresh: if you make a change you click in it to refresh changes. | (resync) | Resync App: Resync your app to align it with the most up to date version |
| (info) | Template Help: Drop down information about the form you are fill in. | (history) | History: This provides an audit trail for record creation, field value changes and other key alterations to the record by recording the User who updated the record and what time they updated the values. |
| (info) | App Information and Learning Resources presents information about the App together with all available Learning Resources | (log out) | Log Out: This allows you to log out of you account, this in turn resync's your apps |
| (question) | Support: Allows the user to search through our support articles for guidance and raise a support ticket for our support agents if further advice is required | | Support: Allows the user to search through our support articles for guidance and raise a support ticket for our support agents if further advice is required. |

# OFF-THE-SHELF APP STORE

**SOFTOOLS**

## 100+ COMMERCIAL OFF-THE-SHELF APP @ AZUUZA.ON.SOFTOOLS.NET

**SUPPLIER ECO-SYSTEM**

**SOFTOOLS**

### SUPPLY CHAIN
Supplier Selector
Supplier Audit
Process Audit

### OPERATIONS
IOT Solutions
Gemba & GMP
Real-time Dashboards

### INNOVATION
Tech Scanning
Ideas Portfolio
NPD Projects

### GO-TO-MARKET
GTM Projects
Catalogue
Sales Scorecard

### DISTRIBUTION
Channel Blueprint
Partner Program
Warehouse Audit

### SUPPORT
Issues & 8D RCA
NCIs & CARs
FMEA

### PEOPLE
P-Plans
Coaching Plans
Absence Tracker

### INFRASTRUCTURE
Capital Projects
Asset Register
Maintenance

### TECHNOLOGY
Tech Roadmap
Apps Audit
D3 Agile Dev

### FINANCE
Contract Audit
Value Analyser
Budgets

### PROGRAMS
PMO Suite
Agile Projects
Risk Register

### GOVERNANCE
KPI Scorecards
Internal Audit
GDPR

**CUSTOMERS**

*Note: Apps are representative only. For full list visit www.softools.net*

# CHARTS & DASHBOARDS

**SOFTOOLS**

## STANDARD SOFTOOLS CHART TYPES
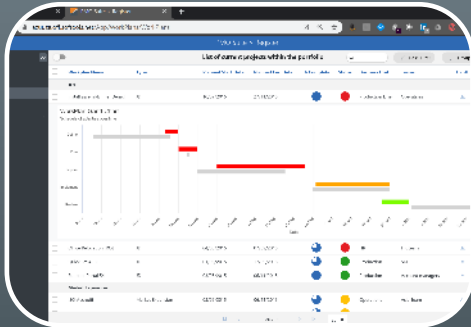


Registers & lists with embedded charts
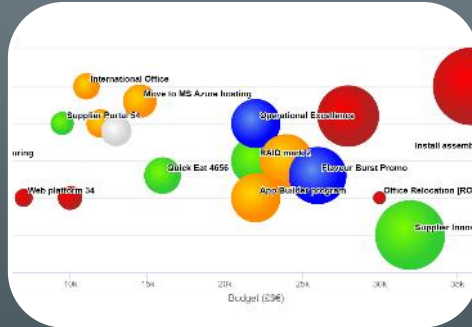
Bubble scatter charts with hover over and drill down
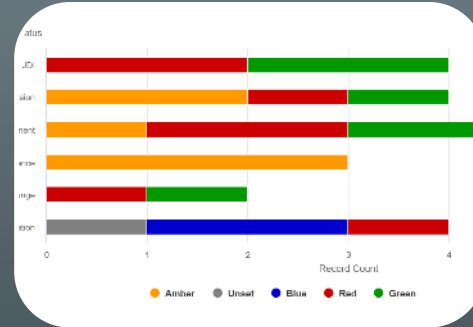
Bar & column charts with Red, Amber, Green status
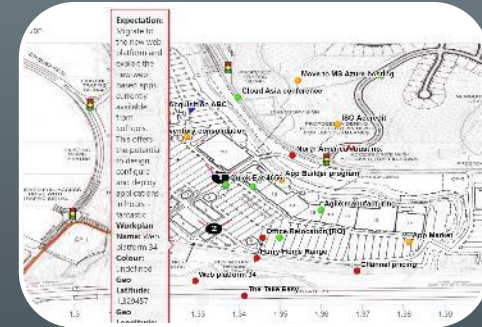
Performance data overlaid on a site map
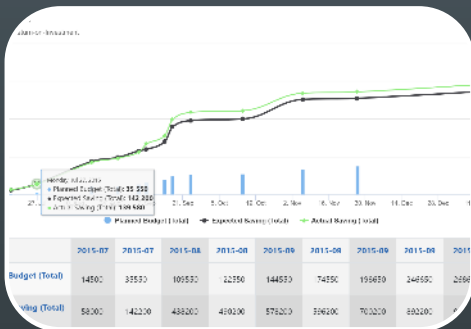
Line charts showing ROI calculation & data
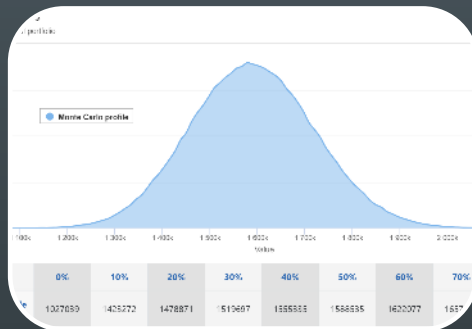
Monte Carlo scenario profiling for risk or value
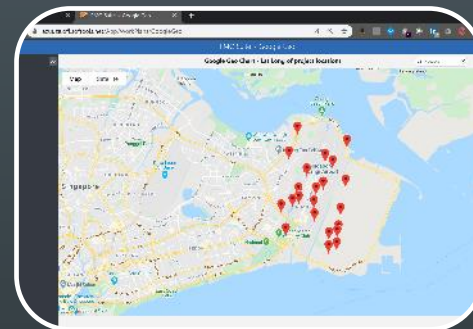
Geo-location showing real-time on Google Maps
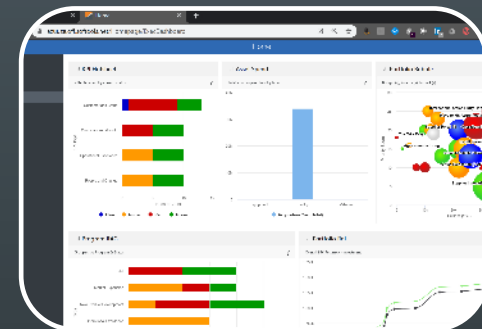
Performance dashboards with clicks to source data

# INTEGRATING WITH ENTERPRISE SYSTEMS

SOFTOOLS

Logic Apps
5,000+ Connector

Open APIs

SOFTOOLS

APPS
Data Input
Forms

CHARTS
Reports &
Dashboards

**APP 1**
KPIs

**APP 2**
Incidents

**APP 3**
Risk Register

**APP 4**
GMP Audit

**APP 5**
5S Audit

**APP 6**
EOSH

Enterprise Systems: ERP +

Smart Devices

Data Lakes / IOT Hubs

Azure Analytics

AI Cognitive Services

Office 365: Word, Excel +

Power BI / Tableau

Microsoft
Silver Partner
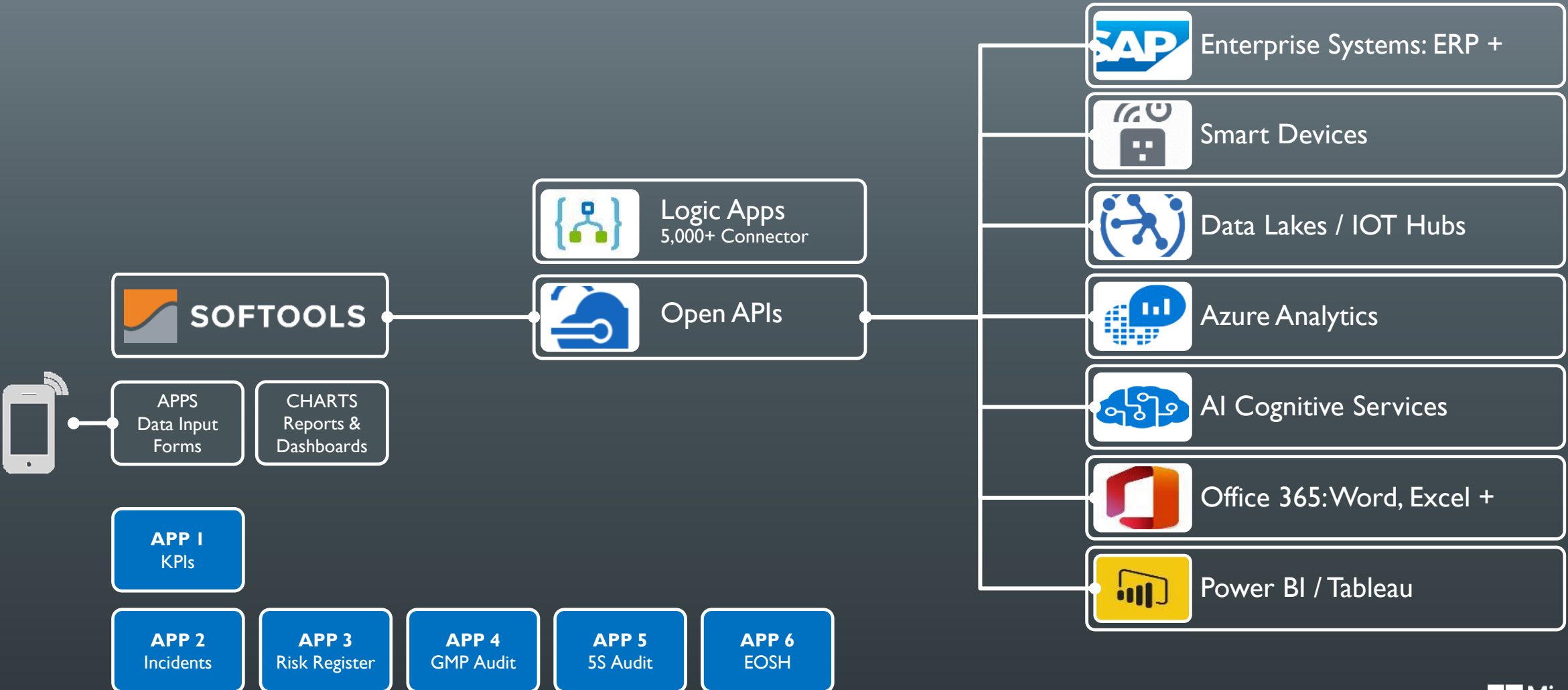
# KEY FACTS

## ACCESS

Access to the platform is via any modern browser (IE11, Edge, Chrome, Safari, Firefox, Opera+).  The platform is mobile-optimised and so can be accessed on any device from PCs and tablets to Smartphones.  Off-line capability is enabled using csv export and import routines, and native app deployment on Windows, Android & IOS) is an option as required.

## APP COMPLEXITY

Applications can range from simple list-based stand-alone apps (e.g. Risk Register), to complex apps (e.g. Supply Chain Assessment) that are linked together, driven by workflow and synchronised to 3rd party systems via Softools published APIs.

## APP BUILD

Certified App Builders use the integral AppStudio to design, configure and deploy apps using a systematic 8-step process in hours and with zero coding.

The Softools API is a JSON-based (JavaScript Object Notation) RESTful API with authentication via "OAuth 2.0 Resource Owner Password" flow with support for refresh tokens

## BUSINESS CONTINUITY

The platform is used by many of the world's leading organisations and Governments, and so data is always held in a secure encrypted environment, controlled by clients and exported at any time.

## DATA INPUT

CSV import is used to complete a one-off migration of client data during set-up.  Then data is entered into the platform in 3 ways: 1) manual data input, 2) export / import via csv, and 3) real-time data synchronisation with 3rd party systems via WebHooks / APIs.

## DATA VALIDATION

Data field parameters and logic based on field type will validate data input is consistent and complete.  Specific fields can be set to be mandatory.  Specific input forms can be visible or hidden using workflow based on user team or field values.

## INFRASTRUCTURE

The platform is deployed in a web hosting environment as single-tenant or multi-tenant.  Our default hosting partner world-wide is MS Azure and so deployments are instantly secure, scalable and stable.

## INTEGRATION

The Softools API is a JSON-based (JavaScript Object Notation) RESTful API with authentication via "OAuth 2.0 Resource Owner Password" flow with support for refresh tokens

## LANGUAGES

The platform is configured to enable the dynamic translation feature in modern web-browsers (e.g. Google Translate).  This allows users in different regions & countries to work on a common platform in their own language. It is also possible for App Builders to 'hard code' all system labels in local languages.

## PERFORMANCE

Speed of access is largely determined by the bandwidth of local wireless & wired network connections or via 3G & 4G mobile networks.  The size of the app will also determine how much data in transferred and will impact speed, as will the proximity of the database to the user (latency).  Dramatic advances in web technology continue to enable faster data transfer speeds globally, and the potential to work off-line.

## SCALE

The platform can scale from 1 app and user to 1,000s of apps and over 1,000,000 users for a single client

## SECURITY

Softools is used by banking, military and nuclear organisations world-wide and can be locked down to any level. Access to the platform is on a named user basis which determines what a user can see (security) and what they can do (permissions).  Single Sign-On (SSO) is available as an option.

## SUPPORT

Users gain first line support from context sensitive help built into each app and platform screen.  Second line support is then provided by internal certified Program Leaders and Administrators.  Third line support is provided to certified Administrators via phone, email and WebEx.

## TRAINING

Users, Administrators and App Builders are trained via webinars or in workshops using an 'action learning' approach:

Level 1 - Basic User (2 hours)
Level 2 – Super-Users / Administrators (+2 hours)
Level 3 – Site Administrators (+2 hours)
Level 4 – Basic App Builders (+ 1 day), and
Level 5 – Advanced App Builders (+ 2 days).