

SOVELIA

User guide
General functions

SYMETRI
ADDNODE GROUP

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1 Introduction

SOVELIA is a product lifecycle management system.

It can cover the role from basic document management to complete product lifecycle management integrated to design, enterprise resource planning and customer relationship systems.

1.1 Terminology

SOVELIA product lifecycle management is based on objects and object relations. Attributes are used to define the objects.

Objects represent items, documents, drawings, items, engineering change orders, contacts and other information managed in the SOVELIA system.

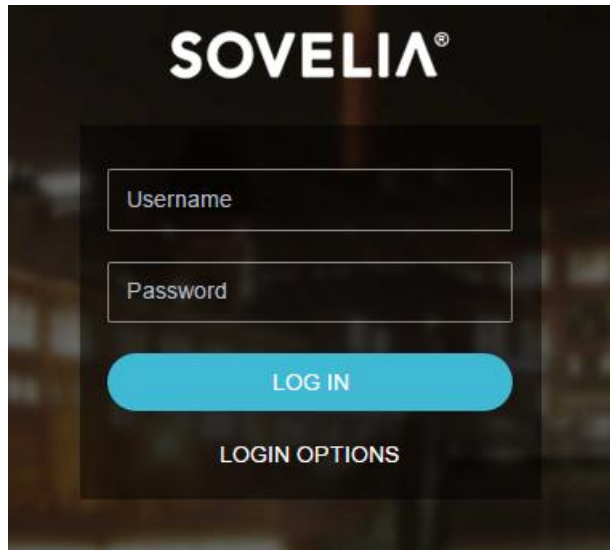
Objects can be linked together using relations to define, for example, item structures (BOM's), document relations to items, item relations to engineering orders etc.

The terms parent and child are used to define the direction of the relation. For example, in an item-drawing relation the item is the parent and the drawing the child.

1.2 Logging in

Launch SOVELIA according to the instructions provided by your system administrator.

Enter your username and password and click "LOG IN".

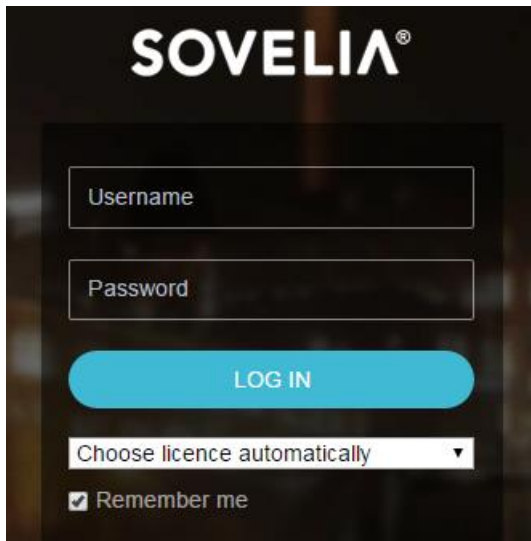


Note: If you key an incorrect password 5 times your login name will be locked for one hour due to security reasons.

Usually there should be no need to access additional selections, by choosing "LOGIN OPTIONS".

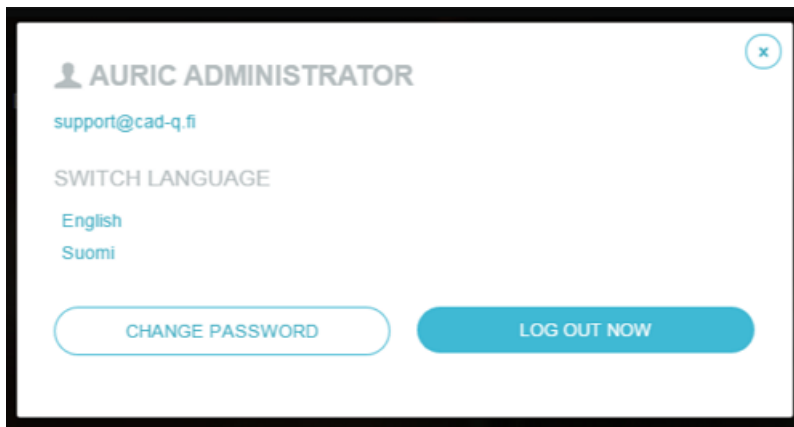
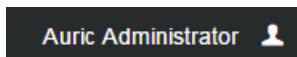
Here you can change your default configuration and role that may affect certain settings setup by your system administrator.

You can also save your login information. Next time you launch SOVELIA you will be logged in automatically.



1.3 Logging out


Use the icon at the top right hand corner to exit SOVELIA.



1.4 Access rights

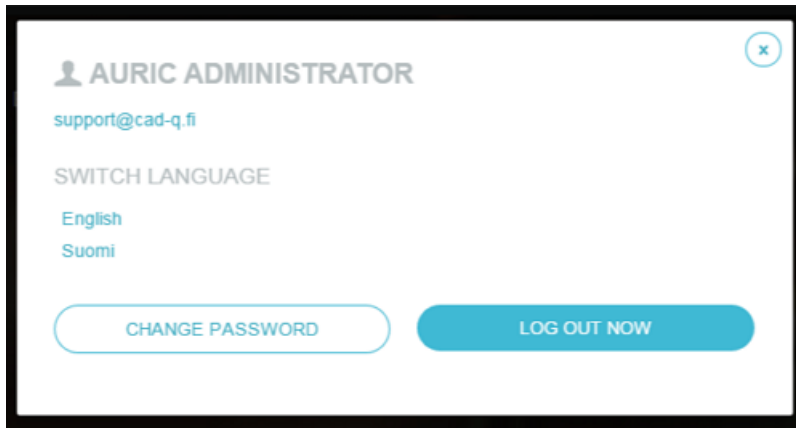
Your access rights usually vary according to object type and status. Access rights are setup by your system administrator.

1.5 Options

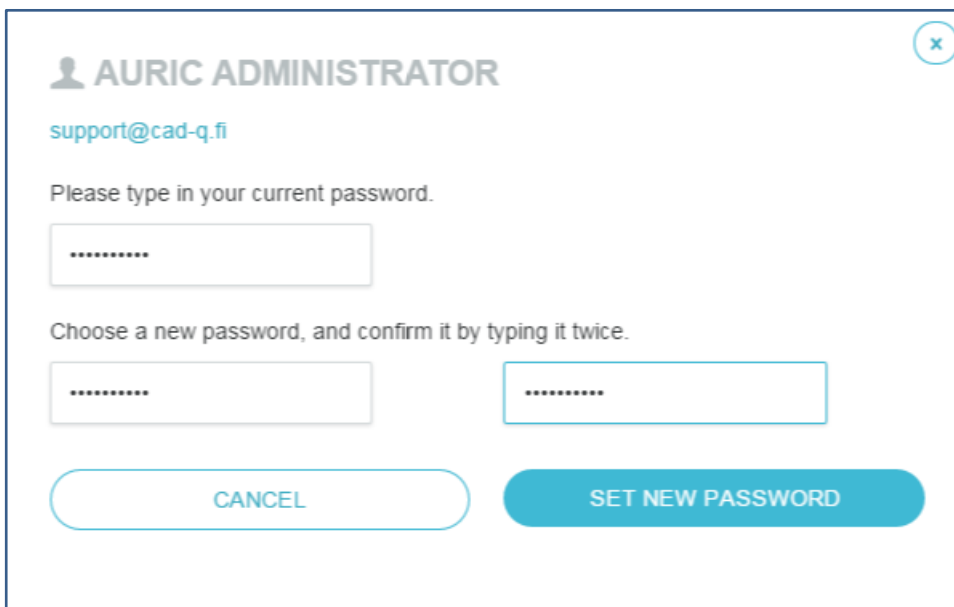
Access the options menu by selecting the  -icon at the top right corner.

Language – A list of interface languages setup at your site.

Change password – Change your password here.



Change password 



A screenshot of the 'Change password' form. It shows the user's name 'AURIC ADMINISTRATOR' and email 'support@cad-q.fi'. The form asks for the current password, a new password, and a confirmation of the new password. It includes a 'CANCEL' button and a 'SET NEW PASSWORD' button. A close button (x) is in the top right corner.

2 Interface

2.1 Home page

Sovelia HTML-home page displays an overview of various quantities of statuses and objects from different classes. From here you can quickly switch between object classes and run searches.

The screenshot shows the Sovelia interface with several key features highlighted:

- Create a new object:** A plus sign icon in the top left navigation bar.
- Type filter:** A dropdown menu labeled "Select type..." in the top search bar.
- Search column:** A search input field labeled "Search criteria..." in the top search bar.
- User options and help icon to manuals:** A user profile icon and a help icon in the top right corner.
- Advanced Search:** A magnifying glass icon in the top right corner.
- Workspaces:** A navigation bar with tabs for "BY ME", "OVERVIEW", "ITEMS", "DOCUMENTS", "ECM", and "PROJECTS".
- Auto-searches:** A row of filters: "Authored by me", "Changed by me", "Changed recently", "Assigned to me", and "SHOW FULL LIST".
- Status overview:** A section titled "ALL-CLASSES-BY-ME" with a donut chart and a table of class counts.
- Class overview:** A section titled "ALL-STATUSES-BY-ME" with a donut chart and a table of status counts.
- See more:** A button labeled "See more" located below the class overview table.
- Monthly statistics:** A line chart titled "MONTHLY-BY-ME" showing data over 12 months, with a year selector below it.

Class	Count
ItemTree	5549
Item class	4090
Dictionary class	2435
Item-Product document relation	1190
Drawing class	1187
Project-Tasks relation	50

Status	Count
INP	3868
RDY	2470
CRE	1100
IND	288
DNR	69
DRF	62

2.2 Search results

This interface is used to find information and to launch functions.

The screenshot shows the SOVELIA search results page. The interface includes a search bar at the top with the text 'adsk*' and a user profile 'Auric Administrator'. Below the search bar, it displays 'SHOWING 50 RESULTS OF 1148'. The results are listed in a grid format, each with a thumbnail, a title, a date, and a status. The right sidebar contains filters for 'SEARCH TERMS', 'TYPE', 'STATUS DESCRIPTION', 'OBJECT CLASS', and 'REVAUTHOR'. Callouts point to specific elements: 'Object ID (open info window)' points to the 'Object ID' field in the first result; 'Subtree search' points to the search icon in the first result; 'Status' points to the 'DRAFT' status label; 'Thumbnail' points to the document icon; 'Attribute overviews' points to the 'IN DESIGN' status label; and 'Display structure of object' points to the 'SHOW CHILDREN' link.

Object ID (open info window)

Subtree search

Status

Thumbnail

Attribute overviews

Display structure of object

SEARCH TERMS

Latest revisions
adsk

TYPE

02-Semi finished	733
01-Modules	285
04-Catalog items	110
05-Platforms	8
03-Brackets	5
06-Welded structures	4

Toggle all 9 items

STATUS DESCRIPTION

Created	1021
Design Ready	69
In Design	54
In Production	3
Draft	1

OBJECT CLASS

Item class	1147
Document class	1

REVAUTHOR

ADM - Auric Administrator	1102
sln - sln	46

2.3 Object information window

The object information window is used to define and view all information related to the object (ECO, item, drawing, document, project, etc.)

Editing mode

Status selectors

Children status bar

Show all object info

Subtree overviews

Object Information:
 ID: 04
 Name: DICT11238
 Description: WELD
 Item type: 2-Off the shelf
 Unit: PCS
 Weight (kg): 0
 In Production: 36

Children Status Bar:
 CRE - Created (Jun 18th 2012)
 IND - In Design (Jun 18th 2012)
 DNR - Design Ready (Jun 18th 2012)
 INP - In Production (Jun 18th 2012)
 INA - In After Sales use (Click to approve)
 OBS - Obsolete (Click to approve)

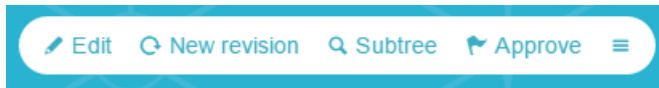
Subtree Statistics:
 CHILDREN: 9
 PARENTS: 1
 ROWS: 45
 TOP PARENTS: 1

Subtree Statuses:
 INP: 36

Subtree Classes:
 Item class: 22
 Drawing class: 14

Subtree Changed Monthly:
 Graph showing a peak in month 6.

2.4 Menu functions in object info window




Edit	Edit current object. Object is locked during editing to prevent simultaneous modification.
New revision	Create a new revision for selected object.
Subtree	View subtree of an object.
Approve	Promote selected object to a higher status.

More creating options:

	Options vary depending on object type.
New document from template file	Create a new document by using a template.
New item from template	Create a new item by using a template.
New document with company template	Create a new document by using a company template.
New drawing for this item	Create a new drawing for selected item.
New product document for this item	Create a new product document for selected item.
New document for this item	Create a new document for selected object.
New ECR for this item	Create a new engineering change request for selected item.
New ECO for this item	Create a new engineering change order for selected item.
New MFC for this item	Create a new manufacturing code for selected item.

3 Basic object creating and editing

To create a new object:

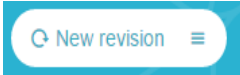
- Click the  -icon
- Select object type
- Object is locked during editing to prevent simultaneous modification.
- Enter mandatory attributes (*) and desired additional attributes
- Click “Create”

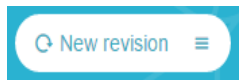
Editing an object:

- Click on the object ID (object information window opens)
- Click the “Edit”-icon on the top right of your screen:
- Execute desired changes
- Click “Save” on the top right corner of your screen



Creating a revision:

- While in editing mode, click the  -icon
- Enter description for revising
- Enter revision number
- Click “Create”



Creating ECOs, ECRs and MFCs, adding files to objects and creating objects using a template:

- While in editing mode, choose
- Select desired action



Replacing object files:


- Search for a desired object with a file
- Enter object information window
- On the right hand side, choose





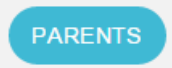
4 Structures and reports

4.1 Relations

Viewing child relations can be done quickly in the search results:


- Search for a desired object with child relations
- Click 

Viewing child and parent relations in object information tab:

- Open object information window
- Scroll down and choose  ,  or 

4.2 Reports

To create a BOM report for an item:

- Enter item information window
- Click 
- Choose PDF or Excel(default) format

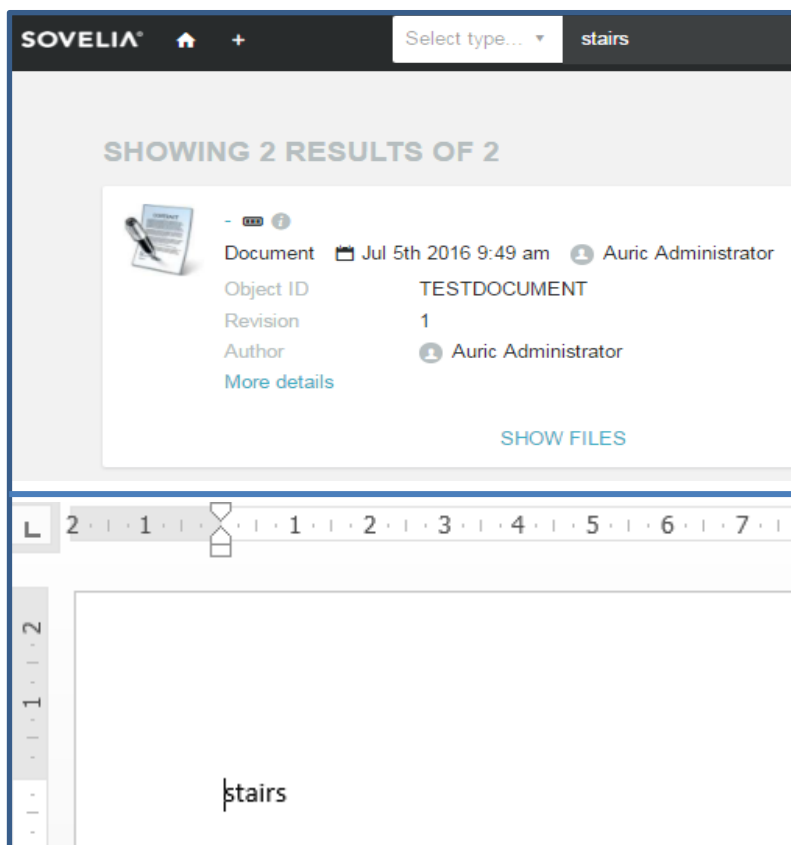
5 Searching

In Sovelia HTML-version, searching is the basis for most of the actions. Searching can be done in different ways:

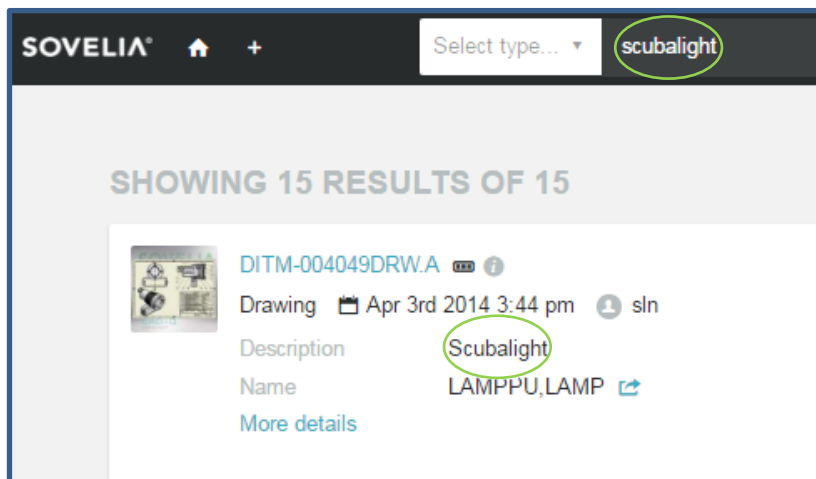
5.1 Common searching

In addition to all the additional searching tools, such as type-search and predefined searches, the search column can be used to search the entire system by using desired key words, just like any other search engine. Typing keywords into the search column and clicking search will display every object that has related information. Additional searching options are explained in the following chapters.

Common searching allows you to search for keywords located in object metadata, as well as files attached to objects. For example, if a document object has a file with the word: 'stairs', typing "stairs" in the search column will display the object in search results.

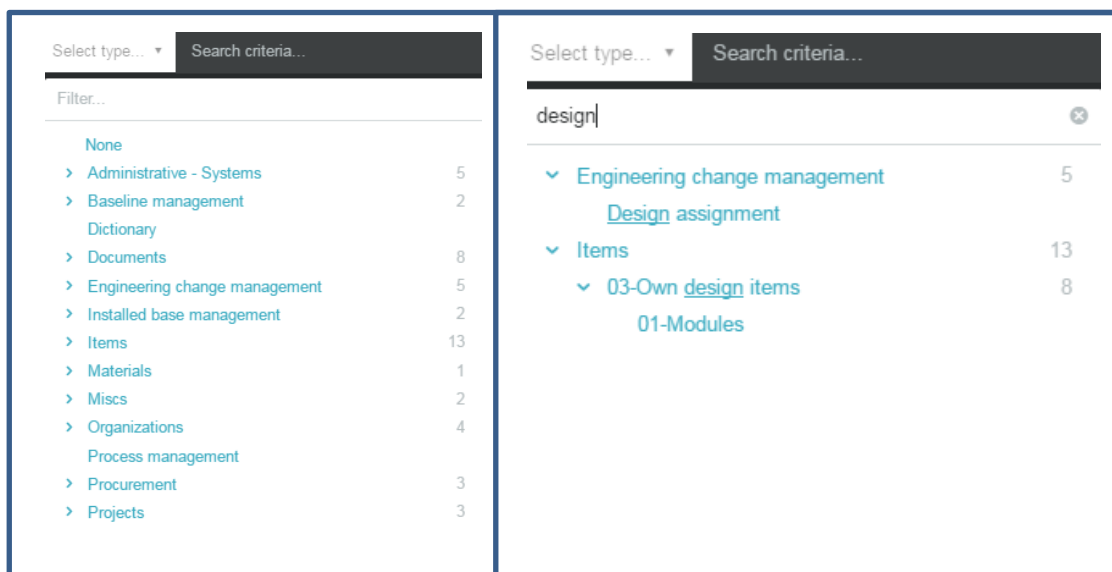


In object metadata



5.2 Searching by type

- Click on the Select type... ▾ icon to open a type list (“type tree”).
- Types can be expanded into subtypes in order to narrow the search even more.
- Type tree can also be searched manually by writing in the ‘Filter’ column.
- Click on desired type.
- All objects of selected type should appear in search results.
- Current search criteria are displayed in the search column on the top middle of the screen.

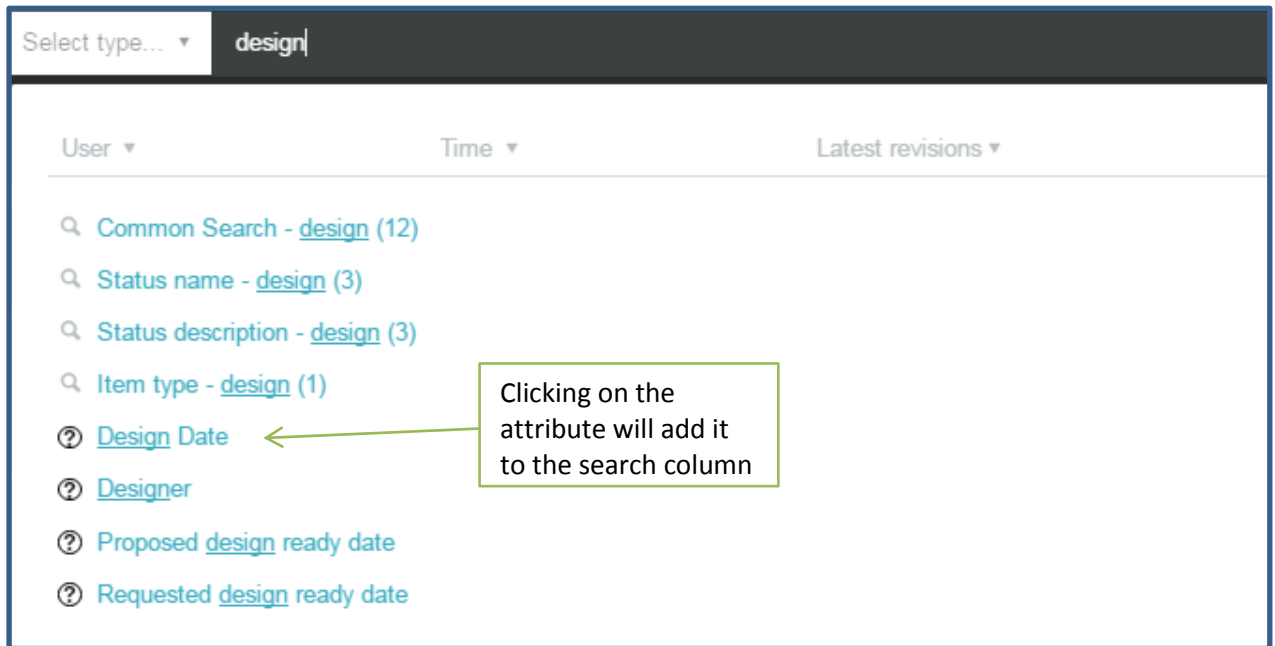


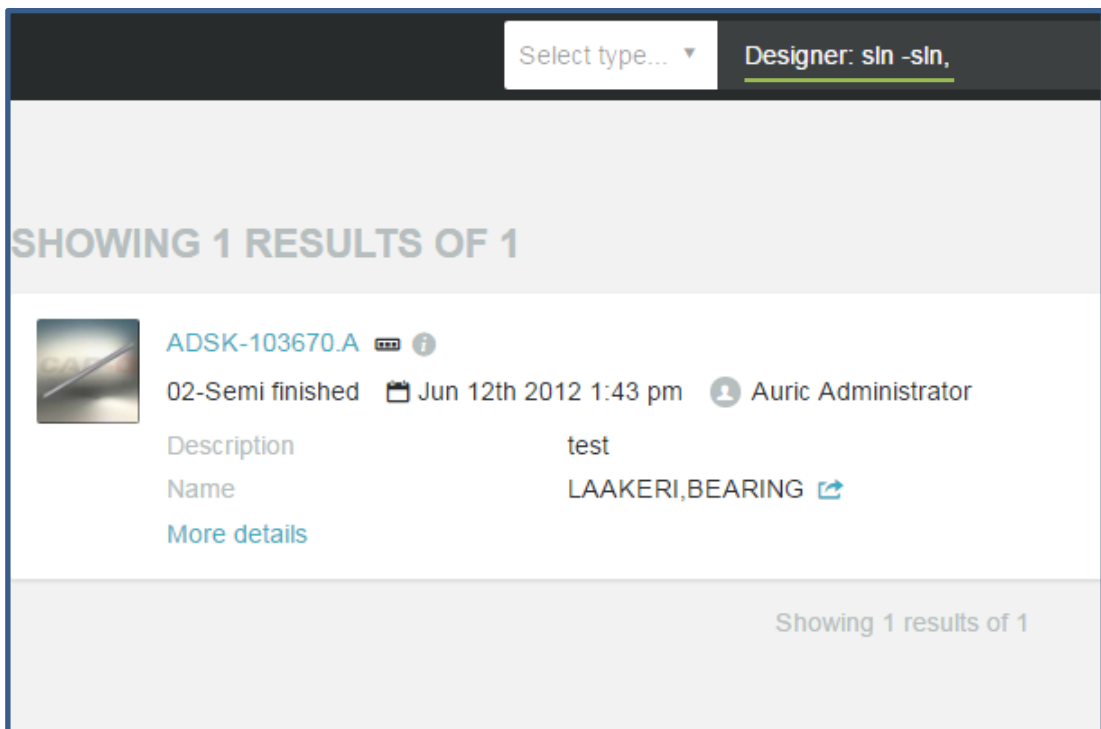
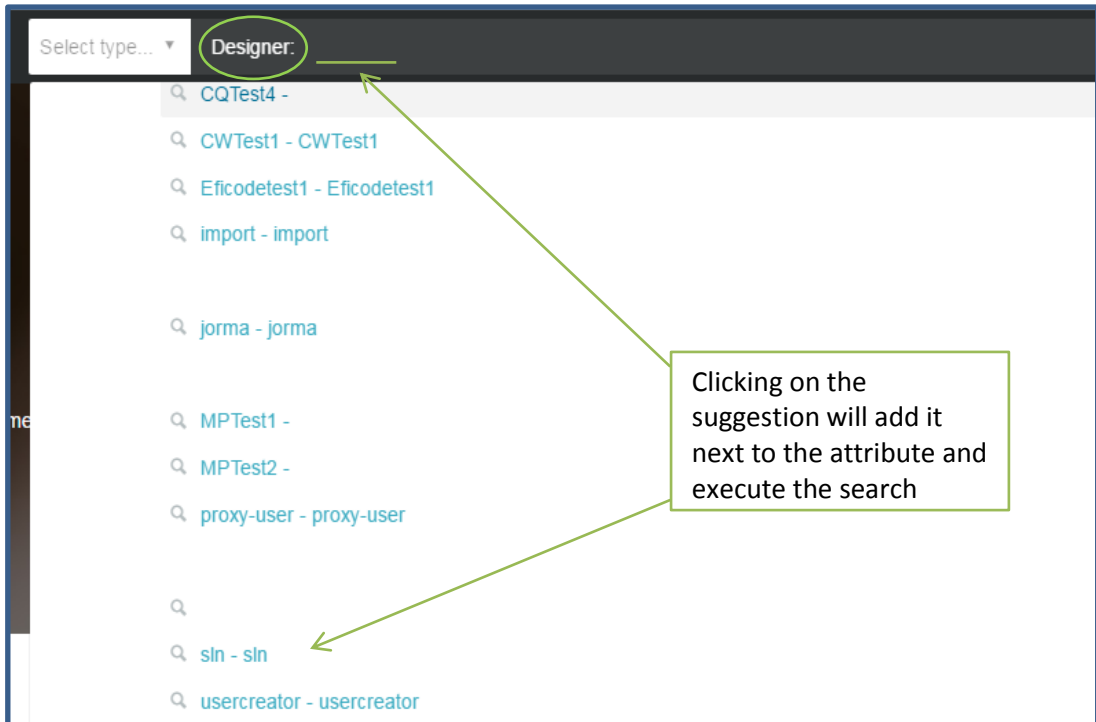
5.3 Search suggestions



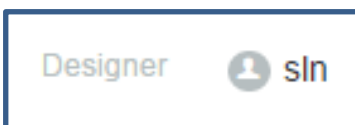
Writing search information into the search column will suggest attributes to search the entered key words by. This will also narrow the search and help finding the desired objects faster. Clicking on the suggested search attributes will add them to the search column. Suggestions vary depending on object type.

For example, typing 'Design' in the search column suggests attributes, which contain 'Design', to execute the search by.



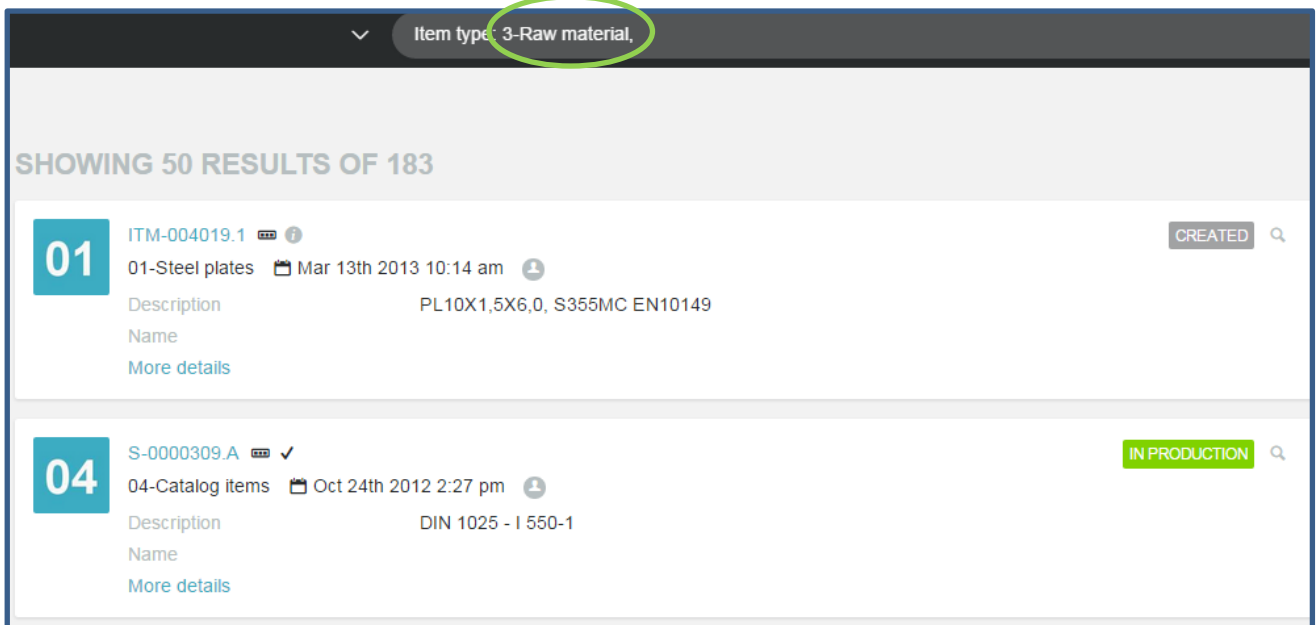
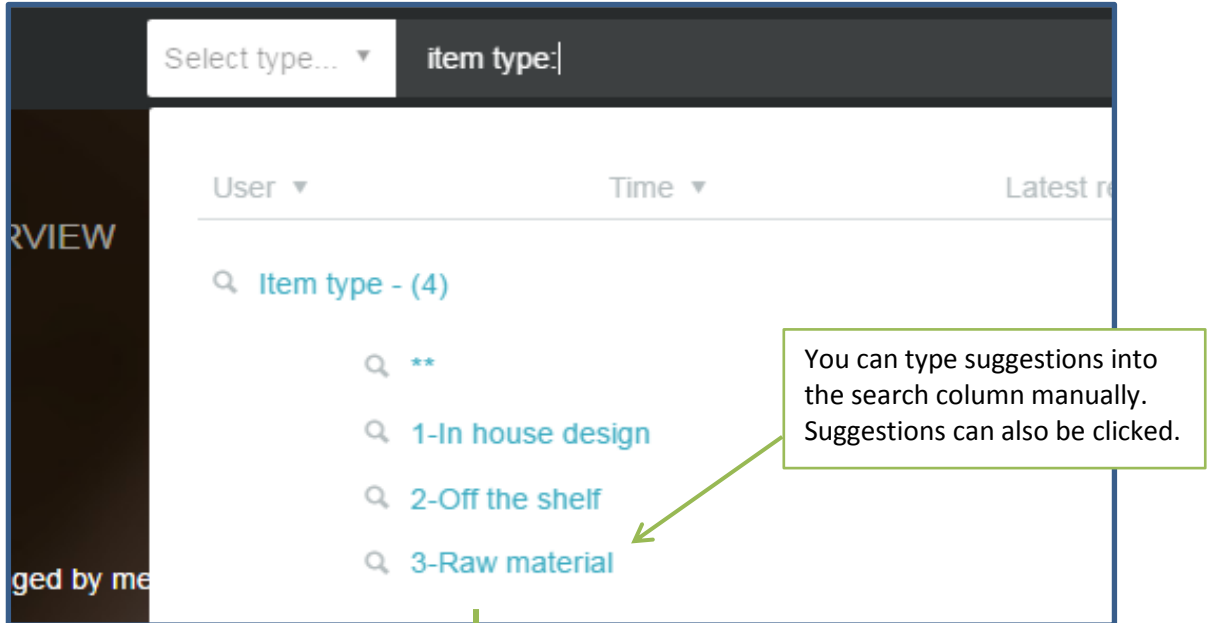


The designer can be viewed in the object info window.

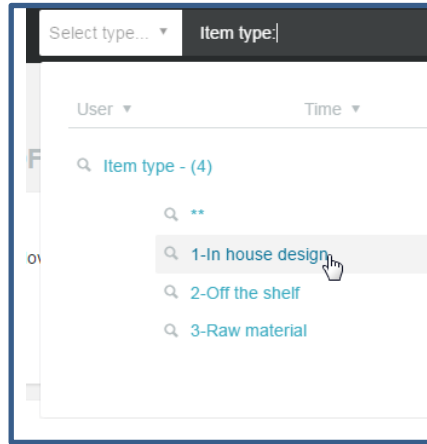
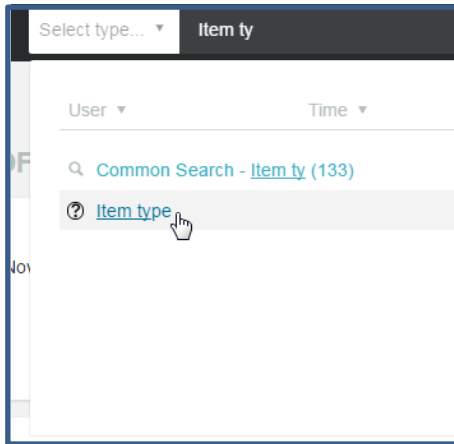


There are various other attributes, such as “Description”, “Item type”, “Author”, “Name” and “Weight”. These search attributes can also be entered manually by typing the desired attribute and adding “:”.

For example:



Search criteria can be combined in order to narrow the search, for example, searching by a desired suggestion and adding a keyword after the comma:



SOVELIA® + Select type... Item type: 1-In house design, m10 🔍 < 🔍^A Auric Administrator 👤 ?

SHOWING 50 RESULTS OF 1863

03 ITM-004148.A 📄 🔍 CREATED 🔍


03-Wooden Parts 📅 Jul 4th 2016 2:07 pm 👤 sin

Description RH CORNER SINK BASE UNIT

Name LEVYPYÖRÄ,RIM 🔗

[More details](#)

[SHOW CHILDREN](#)

 XXX-FT-6002-020.8 📄 🔍 IN DESIGN 🔍

03-Wooden Parts 📅 Jul 4th 2016 2:11 pm 👤 Auric Administrator

Description HINGE PLATE

Name None


[More details](#)

SEARCH TERMS

Latest revisions ⌵

Item type: 1-In house design, m10 ✖

TYPE


	02-Semi finished	755
	03-Own design items	406
	01-Modules	353
	03-Wooden Parts	272
	04-Catalog items	42
	000_Top Item	10

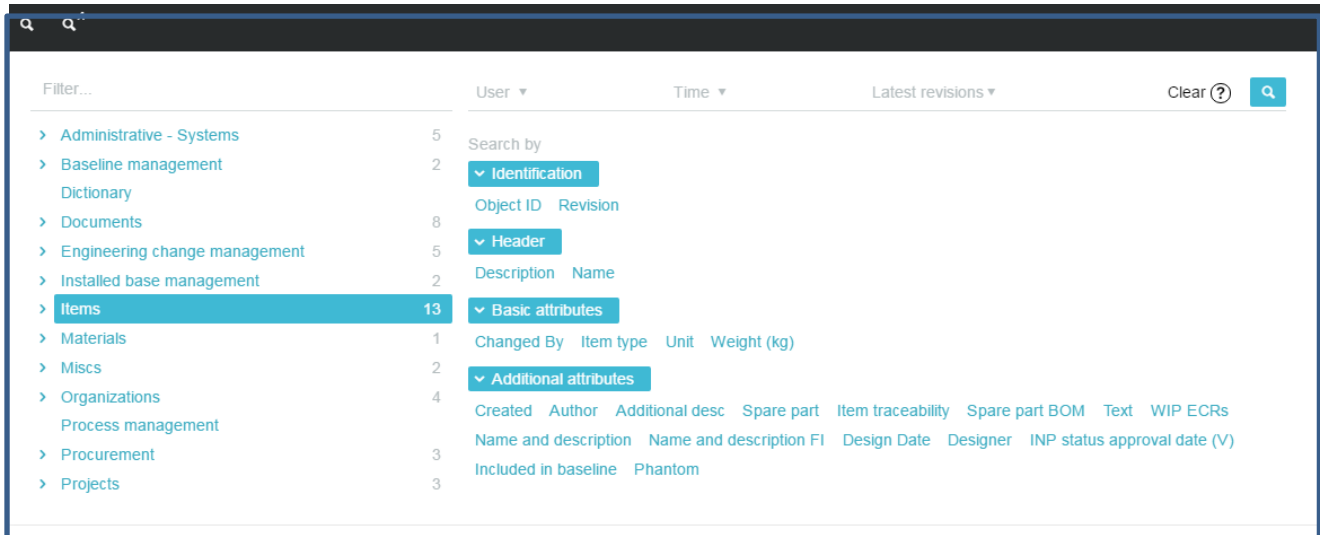
[Toggle all 14 items](#)


STATUS DESCRIPTION

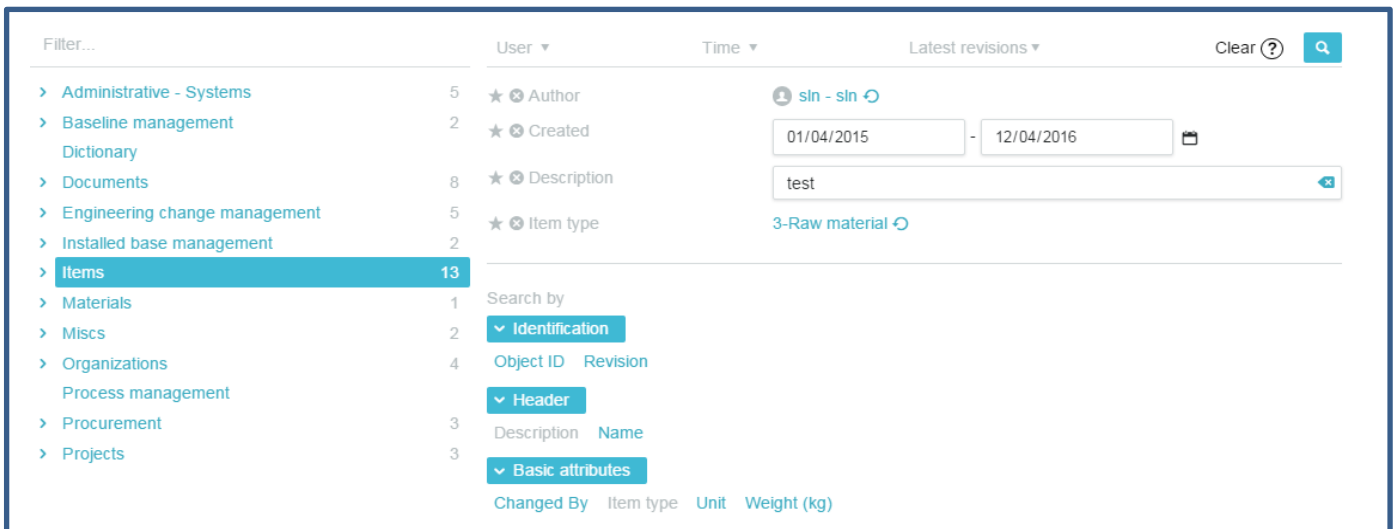
5.4 Advanced search





Advanced search is opened by clicking  button. Every advanced search is started by selecting desired type from the type tree. All attributes that are typical for selected type are displayed after choosing the type. For example following attributes are shown when selecting 'Items' as type:



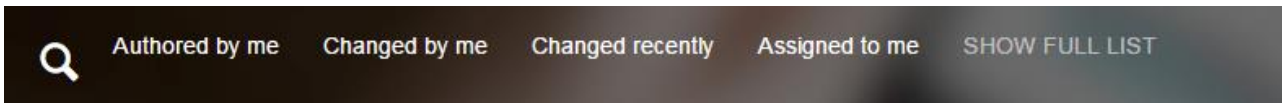
These attributes can then be selected as search criteria by clicking at them and they can be given specific values. For example in picture below Author, Date range, Description and Item type have been selected as search criteria. The search is then executed by clicking  button. All results that correspond with selected criteria are displayed in search results.



- Individual selected search terms can be removed from  icon. All selected search terms can be removed from **Clear** button.
- Search terms can also be added as favorites by clicking  icon. Search terms added as favorites will always be present in top panel of advanced search window regardless of selected type or closure of advanced search and client.

5.5 Predefined searches

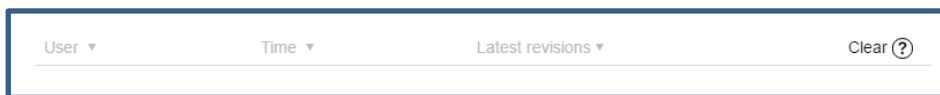
Predefined searches on the home page



Here you can search for objects authored or changed by you and view assignments directed to you. Clicking on the desired option shows the search results and adds the criteria to the search column.

Predefined searches with the search column

- Select the search column.
- Predefined searches suggestion should be displayed:




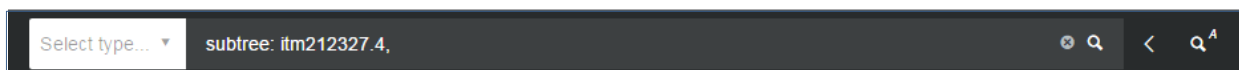
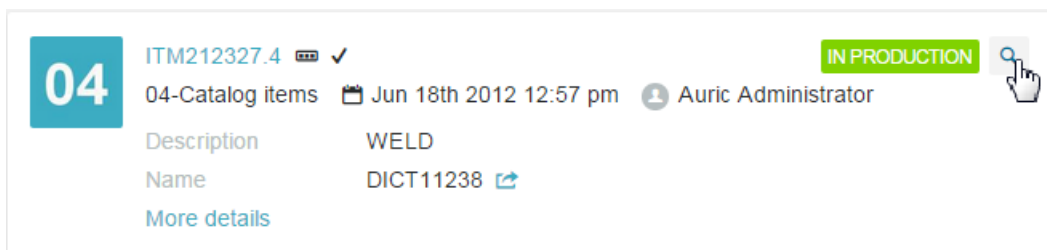
- Choose desired predefined search.

5.6 Searching for text within the search results


When in search results, the basic Windows searching functionality CTRL+F can be used to highlight words from the search results.

5.7 Subtree search


You can view the subtree of an object by clicking the  icon next to the object. This allows you to inspect all children of the selected object. 'Subtree'-criteria is added to the search column:



It is possible to navigate even further in the structure by clicking the icon in the subtree results.

Subtree search can also be executed in the object information window by clicking the  [Subtree](#) icon.

5.8 *Clearing and managing search criteria*

Before you proceed with a new search, you might want to make sure that the previous criteria have been cleared. To clear search criteria click on the  -icon next to the search column or button in suggestion window and proceed with a new search.

Search criteria can also be managed by using the ‘Search terms’ bar next to the search results:

