SOVELIA

User guide

General functions

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ADDNODE GROUP

Contents

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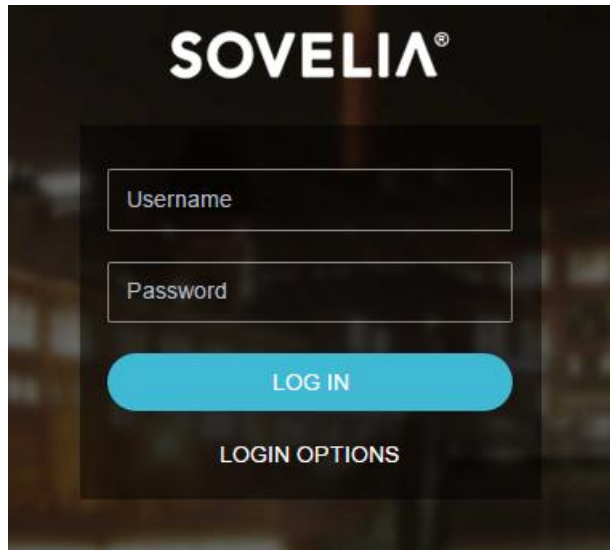
Note: If you key an incorrect password 5 times your login name will be locked for one hour due to security reasons.

Usually there should be no need to access additional selections, by choosing "LOGIN OPTIONS".
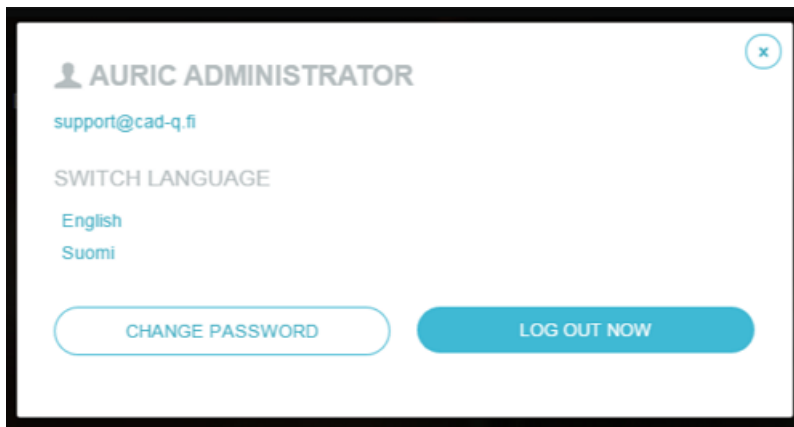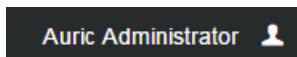
Here you can change your default configuration and role that may affect certain settings setup by your system administrator.

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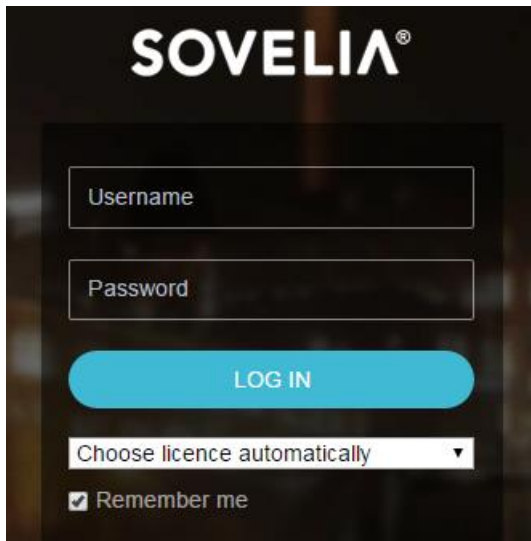
1.3 Logging out

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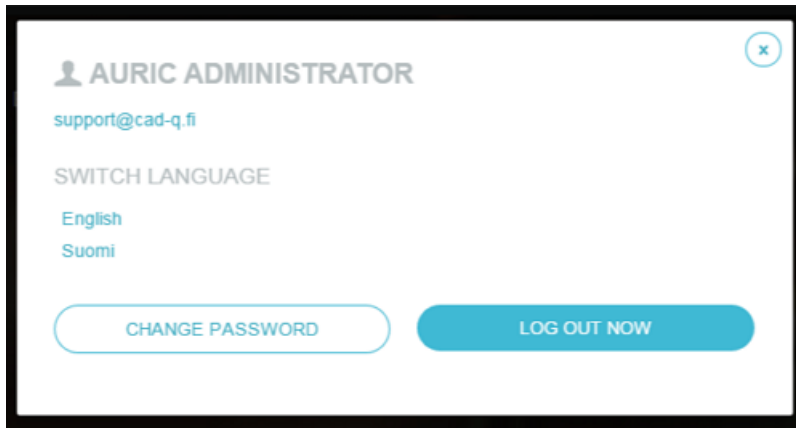

1.4 Access rights

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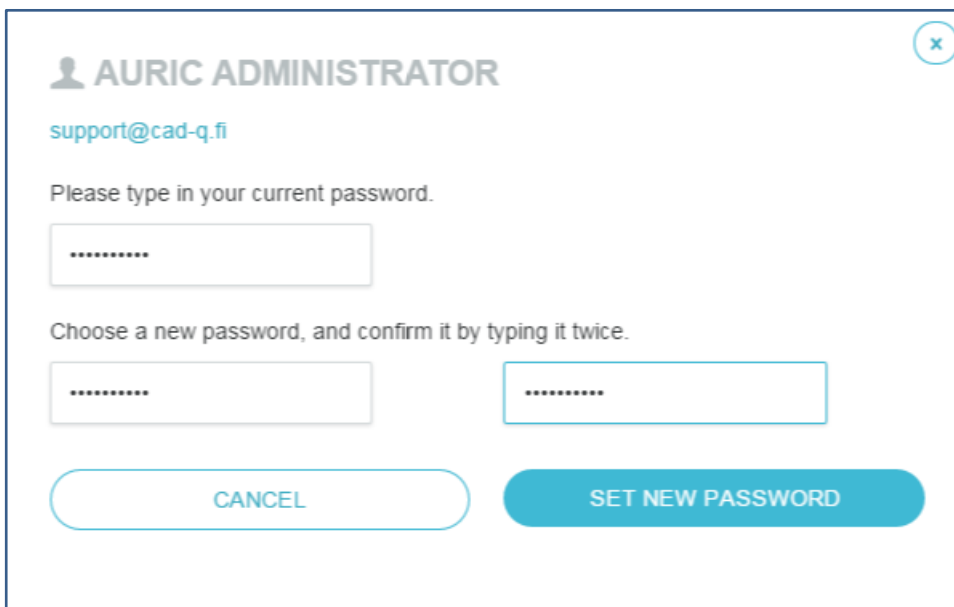
1.5 Options

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

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.

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2.2 Search results

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

Object ID (open info window)

Subtree search

Status

Attribute overviews

Thumbnail

Display structure of object

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

2.4 Menu functions in object info window
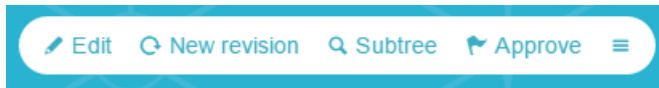
✏ Edit	Edit current object. Object is locked during editing to prevent simultaneous modification.
↻ New revision	Create a new revision for selected object.
🔍 Subtree	View subtree of an object.
🏳 Approve	Promote selected object to a higher status.

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
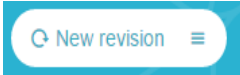
To create a new object:

- 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 ⟳ New revision ☰ -icon
- Enter description for revising
- Enter revision number
- Click "Create"
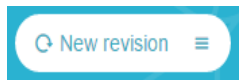
Creating ECOs, ECRs and MFCs, adding files to objects and creating objects using a template:

- While in editing mode, choose ☰
- Select desired action

Replacing object files:

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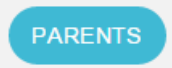- On the right hand side, choose Replace file

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 SHOW CHILDREN

Viewing child and parent relations in object information tab:

- Open object information window

- Scroll down and choose CHILDREN , TOP PARENTS or PARENTS

4.2 Reports

To create a BOM report for an item:

- Enter item information window

- Click

- Choose PDF or Excel(default) format

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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.
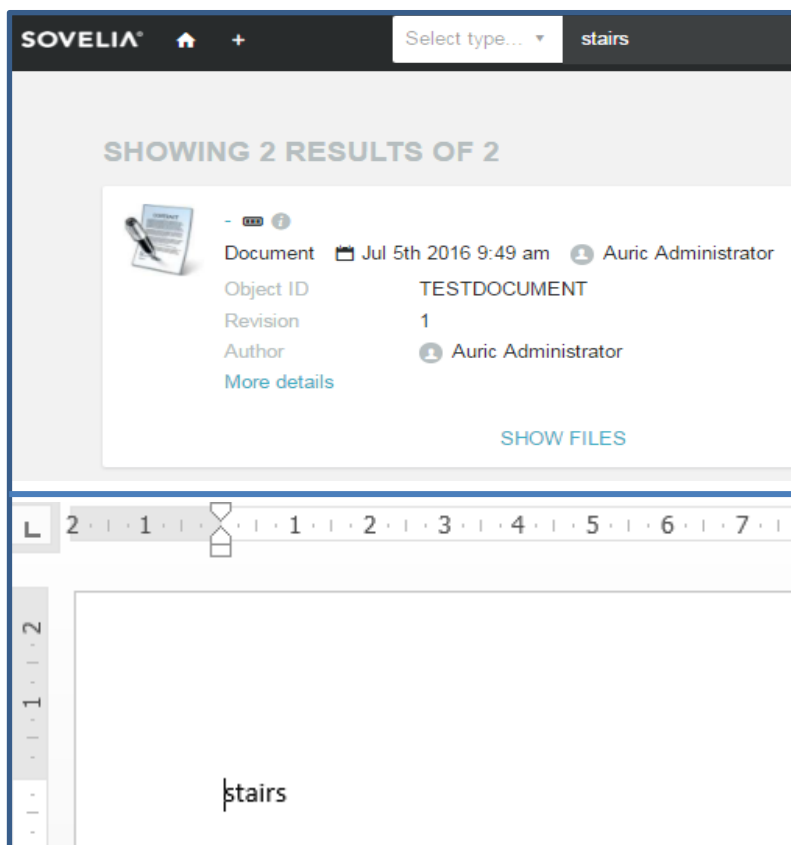
In object metadata
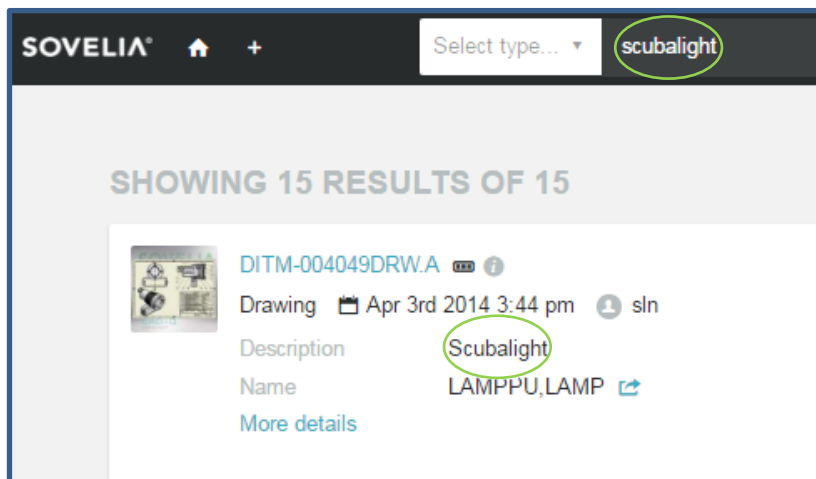
5.2   Searching by type

- 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.
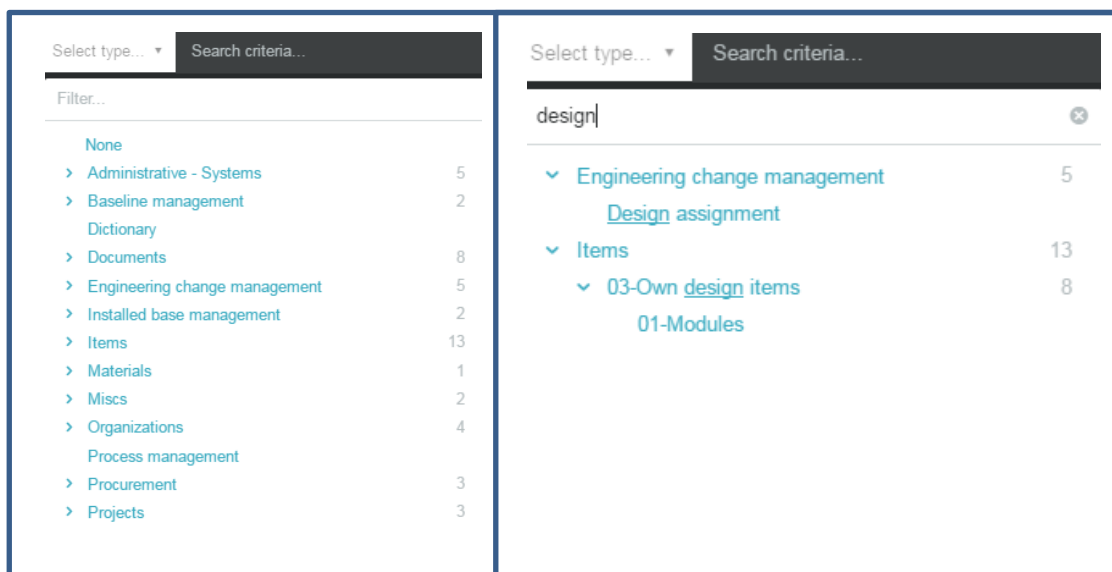
5.3   Search suggestions

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.

Clicking on the suggestion will add it next to the attribute and execute the search
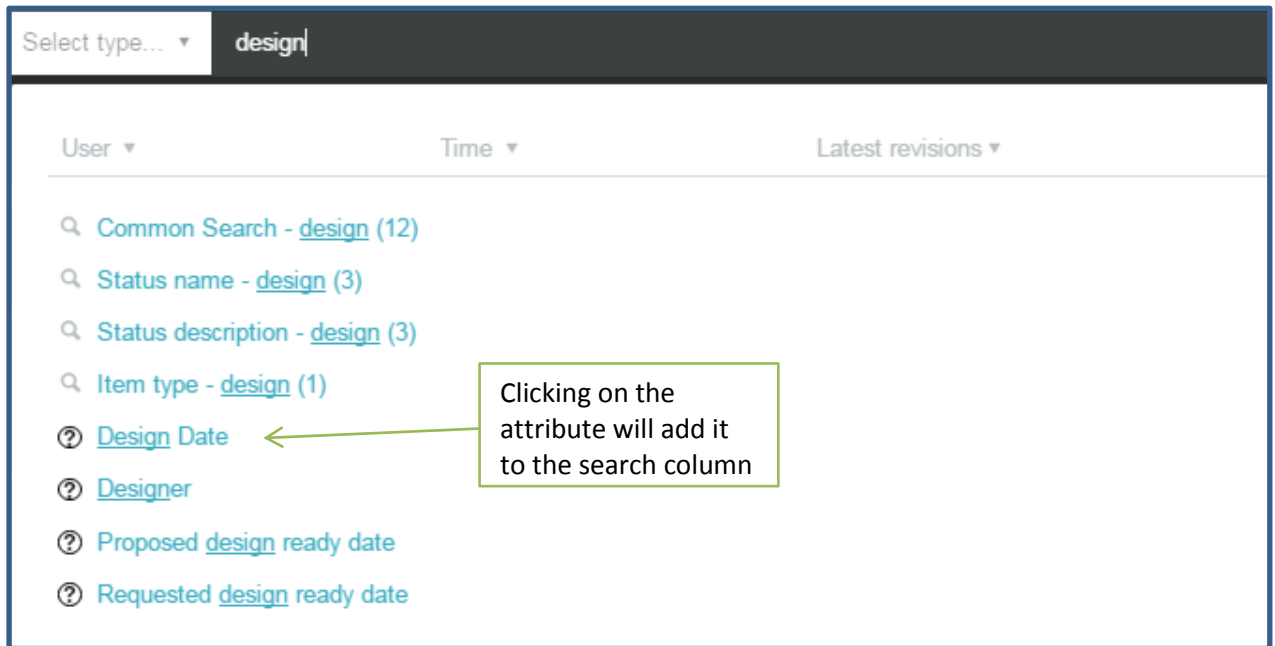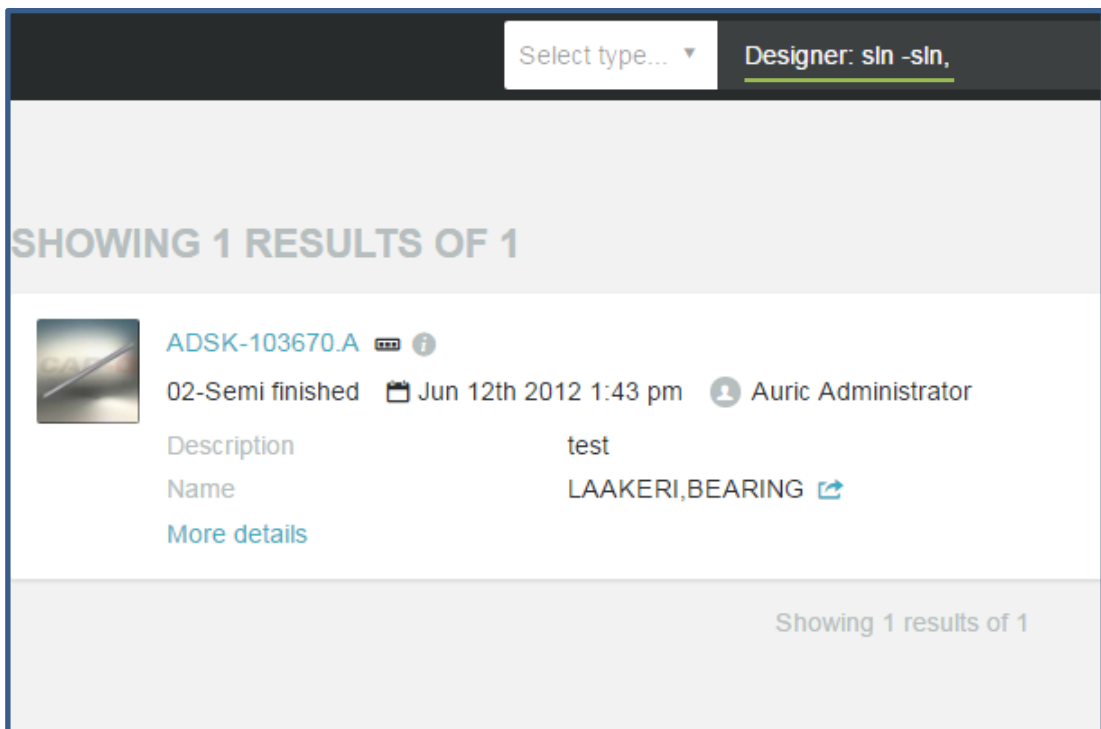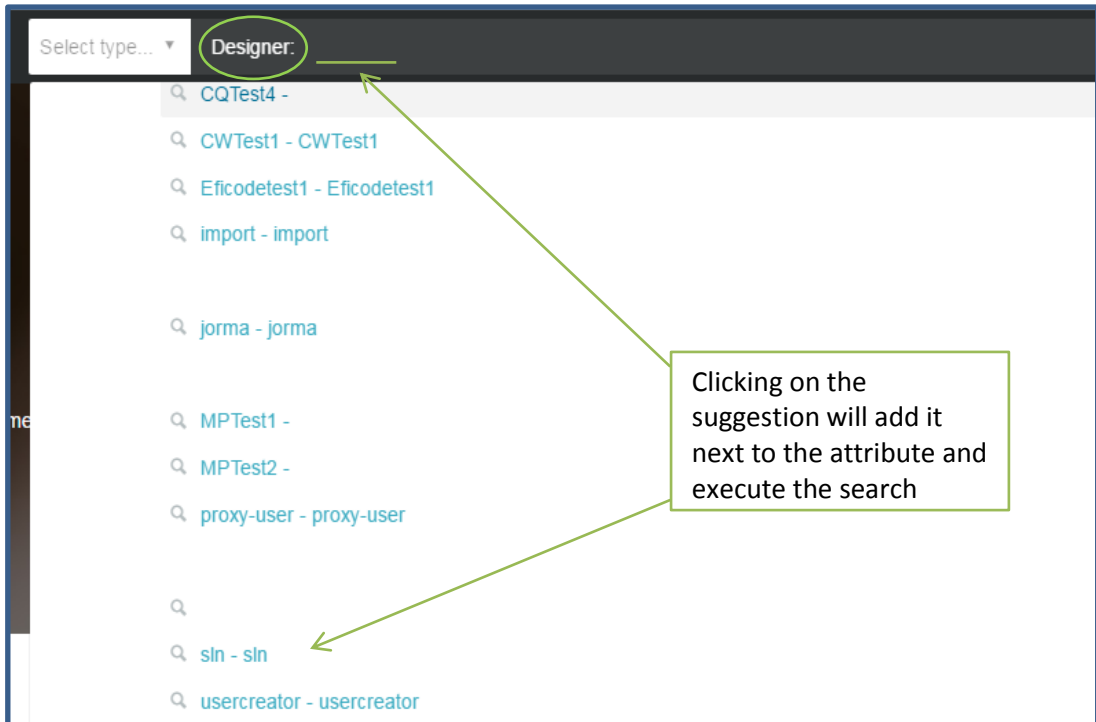
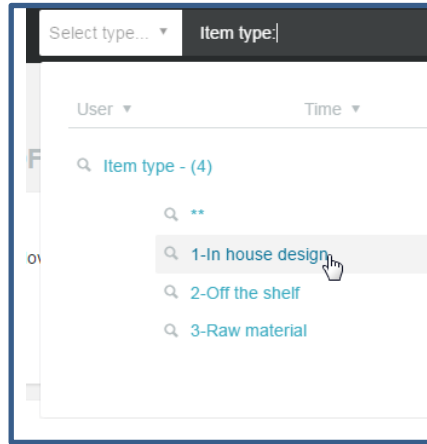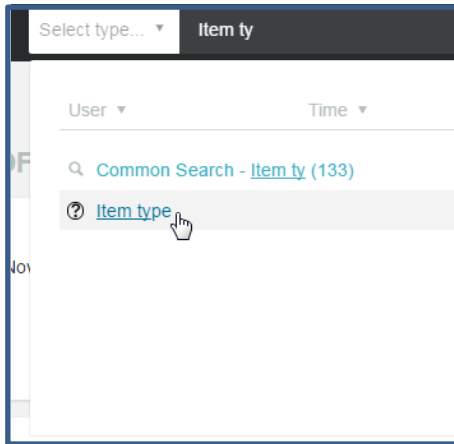The designer can be viewed in the object info window.
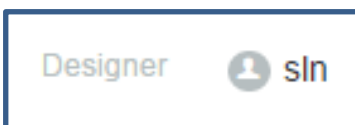
There are various other attributes, such as "Description", "Item type", "Author", "Name" and "Weight". These search attributes can also be entered manually by typing the desired attribute and adding ":".

For example:

You can type suggestions into the search column manually. Suggestions can also be clicked.
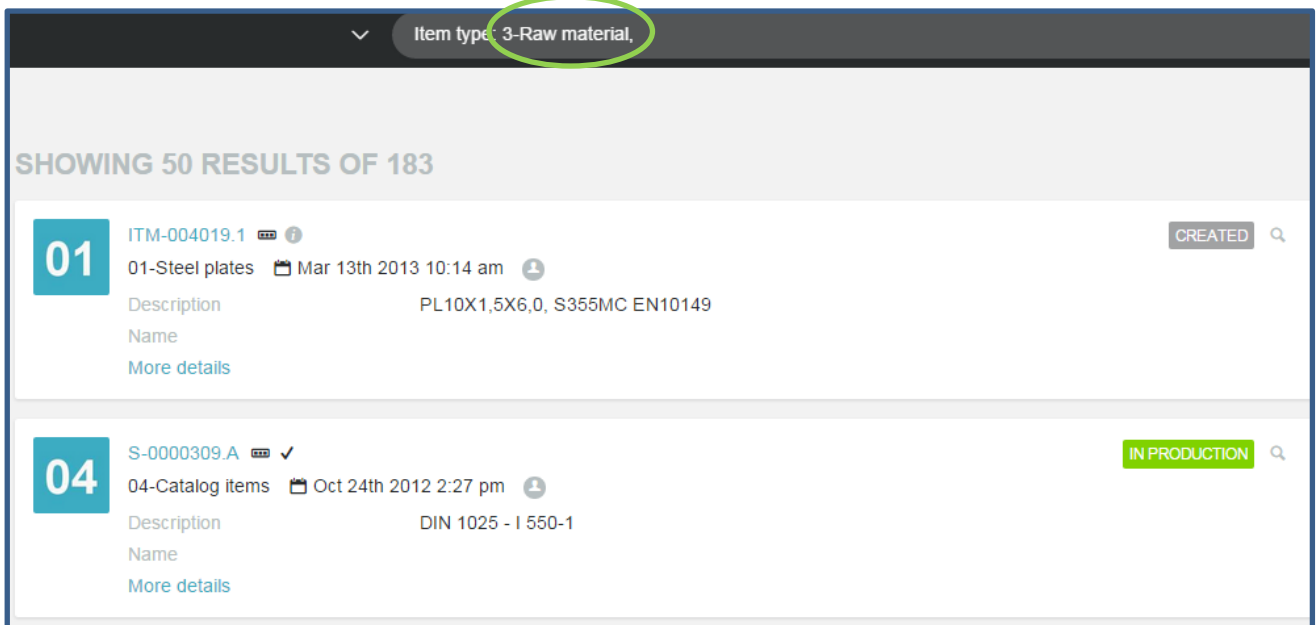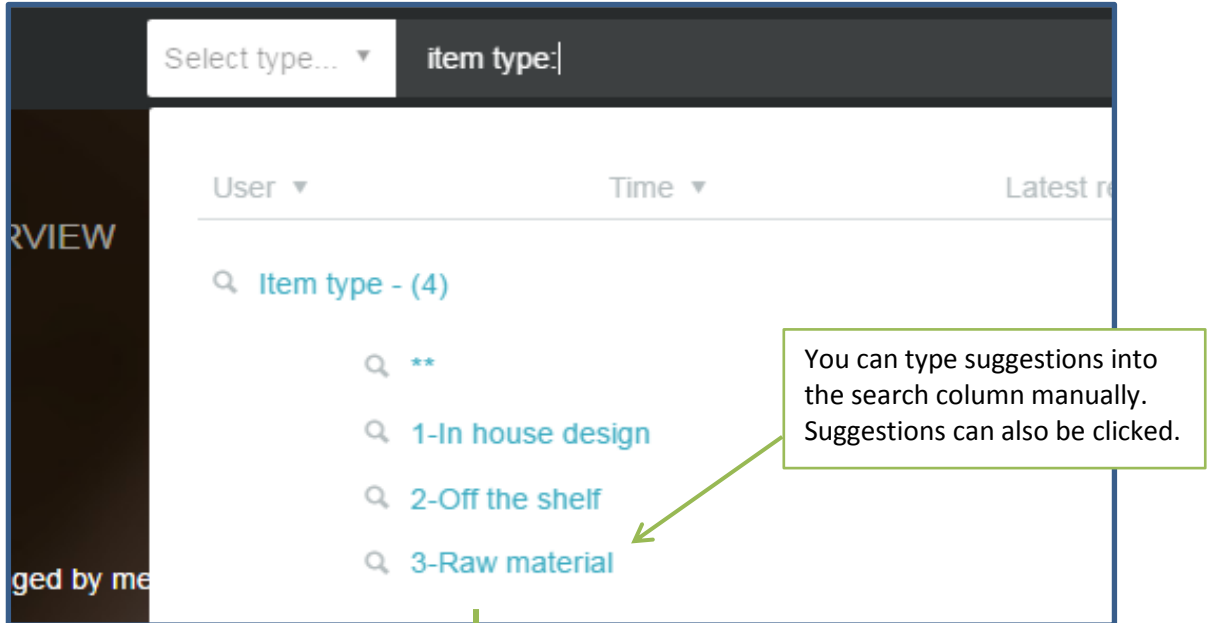
Search criteria can be combined in order to narrow the search, for example, searching by a desired suggestion and adding a keyword after the comma:

Enter keyword/other criteria after the comma

5.4   Advanced search

Advanced search is opened by clicking [Q^A] 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:
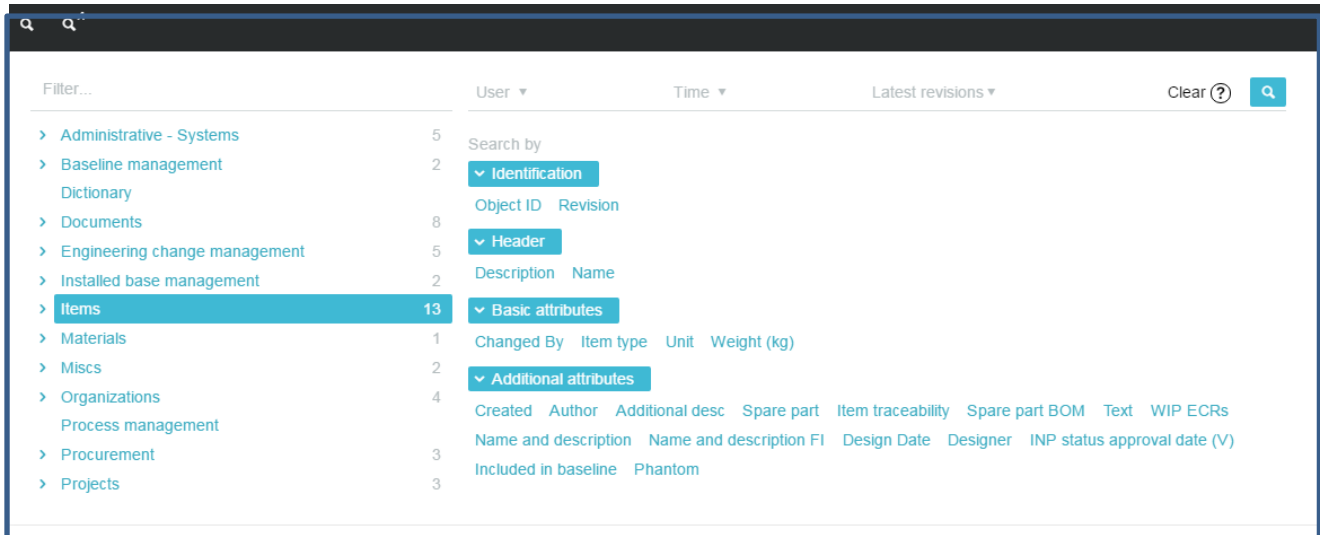
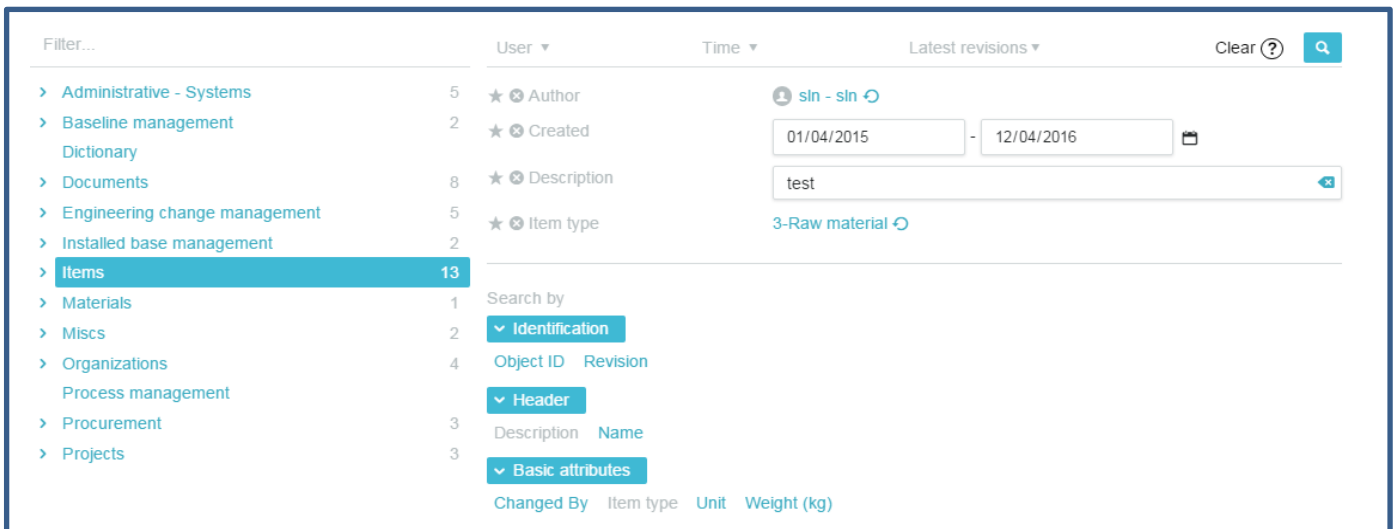These attributes can then be selected as search criteria by clicking at them and they can be given specific values. For example in picture below Author, Date range, Description and Item type have been selected as search criteria. The search is then executed by clicking [Q] button. All results that correspond 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.
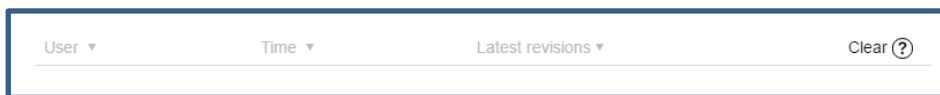
5.5   Predefined searches

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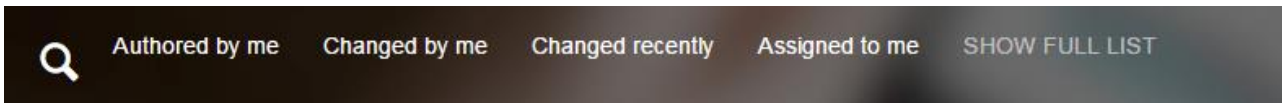
Here you can search for objects authored or changed by you and view assignments directed to you. Clicking on the desired option shows the search results and adds the criteria to the search column.

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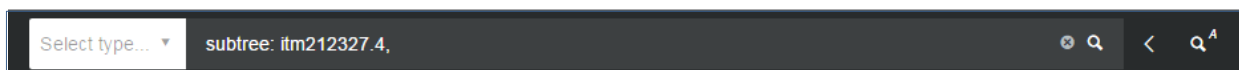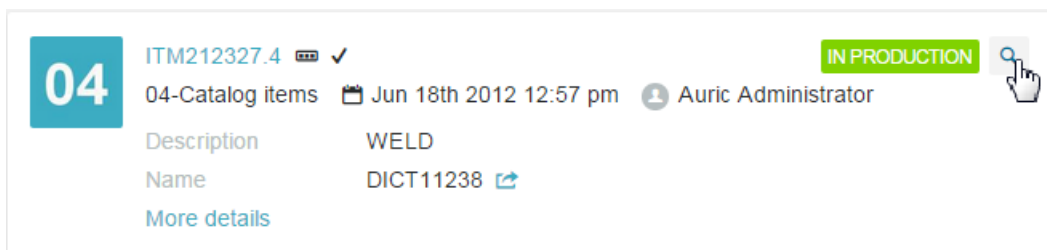
It is possible to navigate even further in the structure by clicking the icon in the subtree results.

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 Clear 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: