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# ***E-book: The Secrets of SERTICA***





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## ***Unlock the Secrets***

This e-book is a gateway to the many secrets in the SERTICA fleet management system and includes everything from simple shortcuts to best practice ideas. The secrets will help you optimize the daily use of SERTICA and give you maximum value of the system.

The e-book is intended for the frequent SERTICA user or a new curious user. If you need help finding out how to put these tips to use, please contact SERTICA support or your regular contact person at Logimatic.



## Shortcuts

**#1** The shortcut key only works if the screen is available in the mode you are in. Some shortcuts work on both office and unit. Others only work on the unit, because the screen is only available on the unit, for example **F6 Job** and **F8 Job History**.

**F1** Help

**F2** Address Book

**F3** Account

**F4** Component

**F5** Update Screen

**F6** Job

**F7** Tree Structure

**F8** Job History

**F9** Item / Spare Part

**F11** Requisition

**F11 + Shift** Request for Quote

**F11 + Ctrl** Purchase Order

**F12** Job List

**Ctrl + D** Delete

**Ctrl + F** Search

**Ctrl + F** Recall Last Search

**Ctrl + M** Use to open ex. Job text in Multiline editor

**Ctrl + N** New

**Ctrl + Shift + N** Copy

**Ctrl + O** Options

**Ctrl + Q** Cancel

**Ctrl + S** Save

**Ctrl + T** Task List

**Alt + U** Search for Screen or Unit

**CTRL + Space** Move cursor to search field

**Ctrl + Enter** Create new line in a reference grid

**#2** Some shortcuts can be found in SERTICA under *File* → *Help* → *What's New* (internet access required).

[View a full list of shortcuts.](#)

**#3** If you have the cursor in the date field you can insert today's date by pressing **d**.

**#4** Use **Alt + ↓** to open a search box in grids. Hereby you can for example select measure unit on a requisition position.

**#5** You can use **Ctrl + Enter** to create a new line in a reference grid when this has focus. E.g. a position on a requisition.

**#6** Use **Ctrl** or **Shift** to mark multiple lines. As an example, you can mark several items in an item list and thereby add them all to a requisition at once.

**#7** Clicking the middle mouse button on an open screen tab in SERTICA closes the tab instantly.

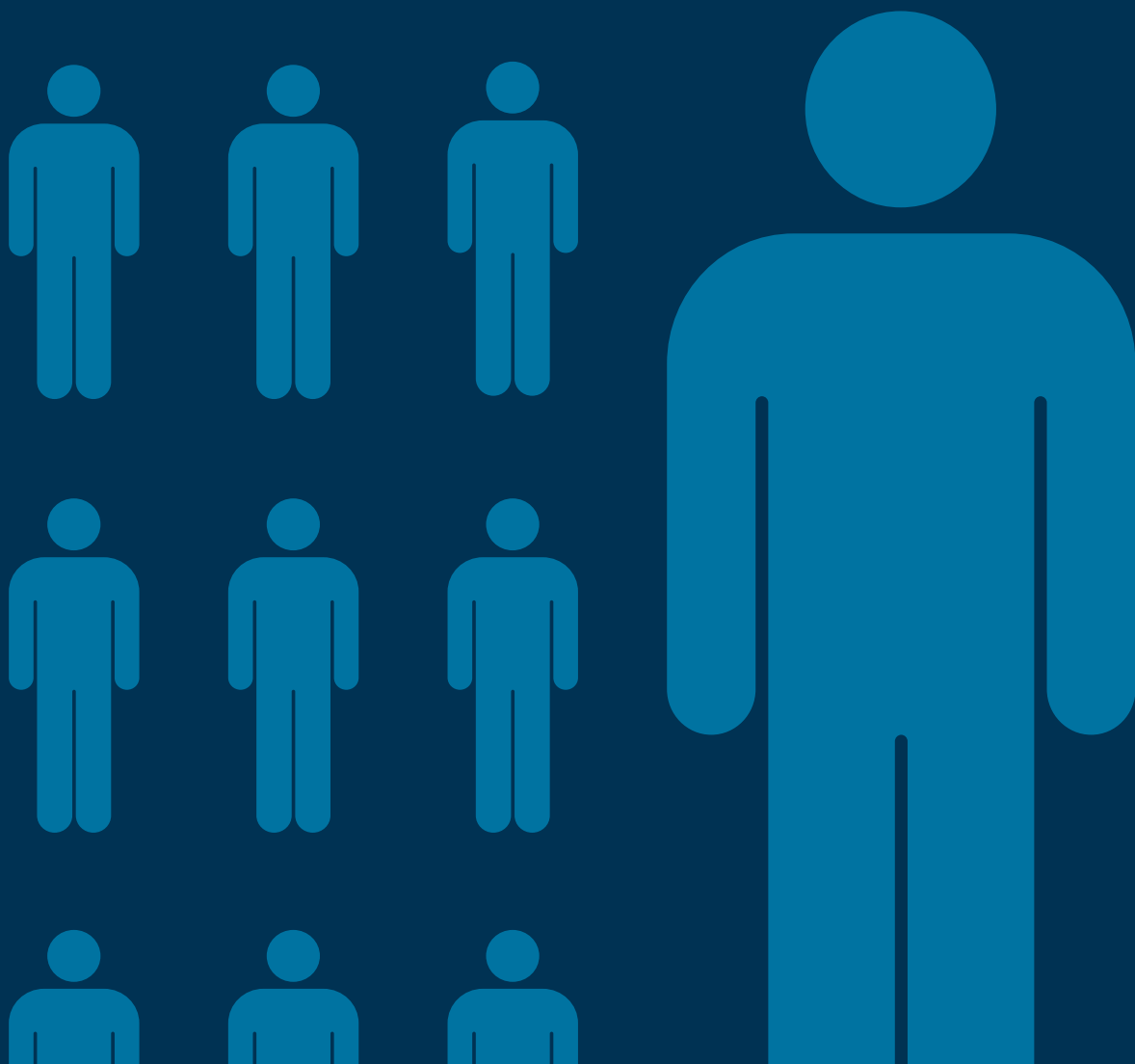
**#8** Double-clicking a row in a reference grid, e.g. *Job Procedure* on the job screen, will open a new tab showing details of the row you clicked. Pressing **Ctrl + F4** will close details and take you back to the original screen.

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## User

### #9

Default values such as language can be set by the administrator for new users in *Options* under *User*.

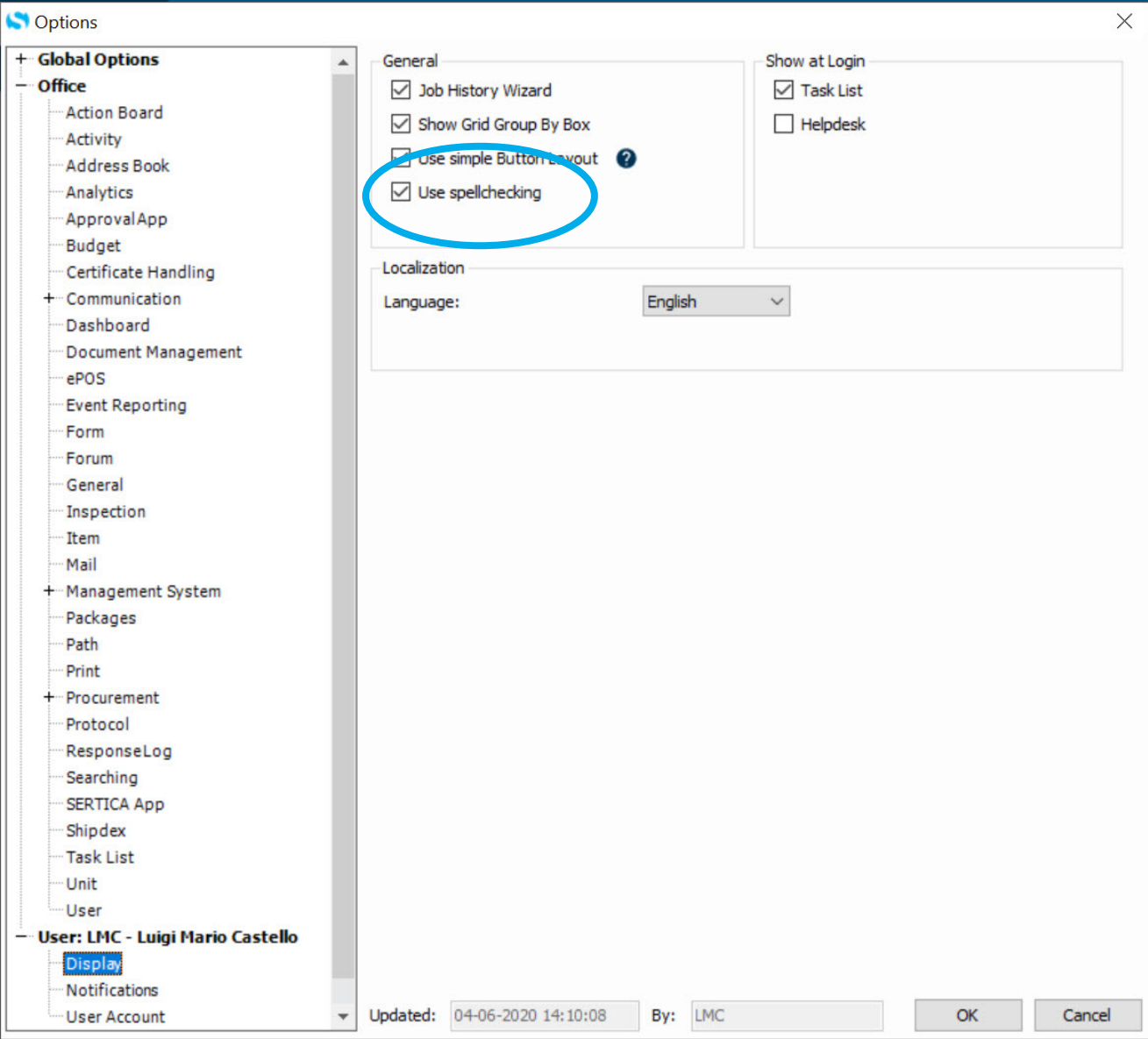


#10

It is possible to show the Task List screen on login to ensure the users see relevant dashboards. This can be activated on the user screen. It can also be configured which dashboards a user should see on the task list.

#11

The administrator can enable spell checking on text fields in SERTICA. Spellchecking is enabled from the user options or from the user screen.



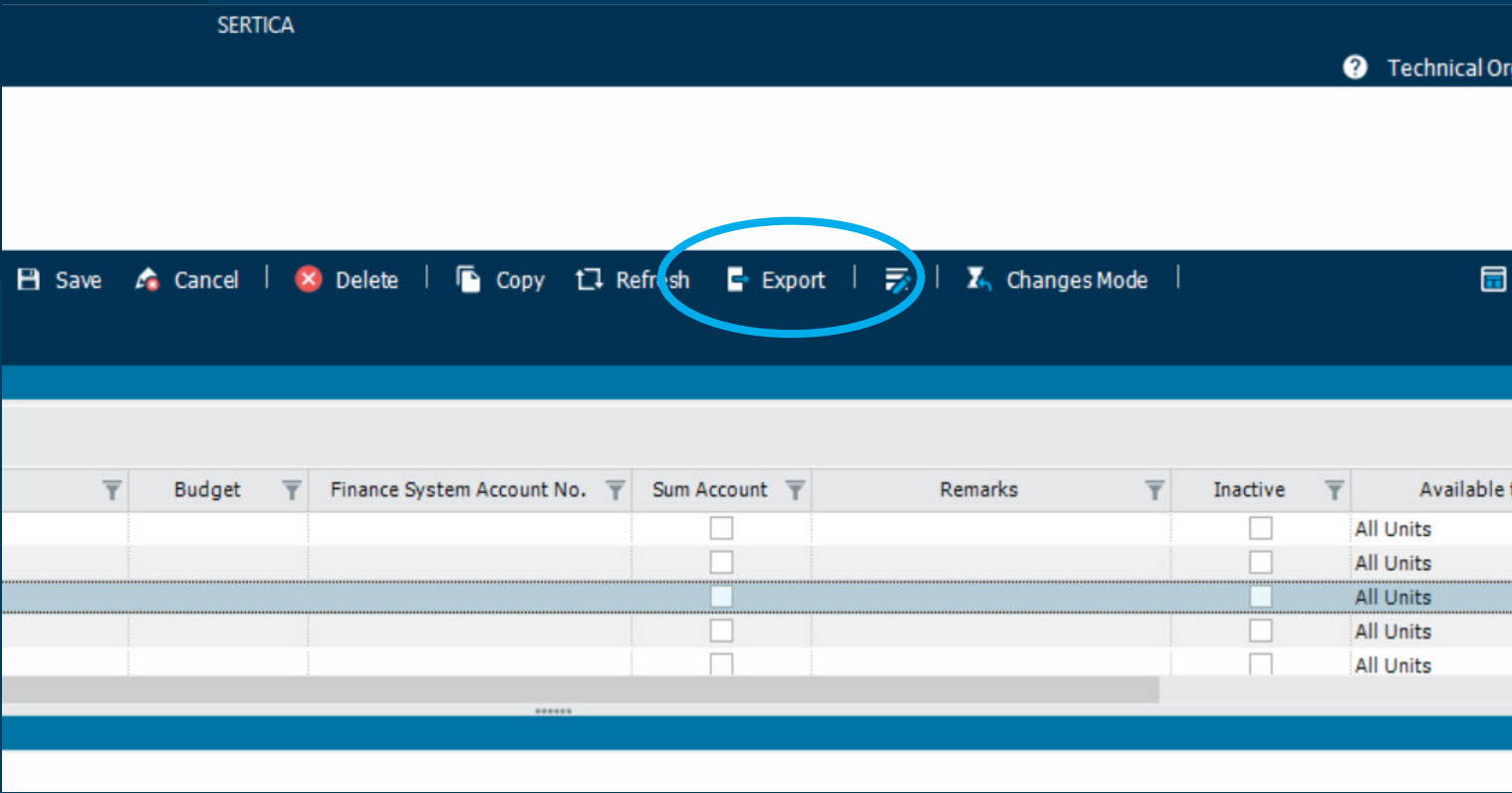
# Overview

#12

Use *Unit Groups* to get an easy overview of your fleet.

#13

It is always possible to export your overview list on a screen to Excel. Just press the *Export* icon.



## Jobs

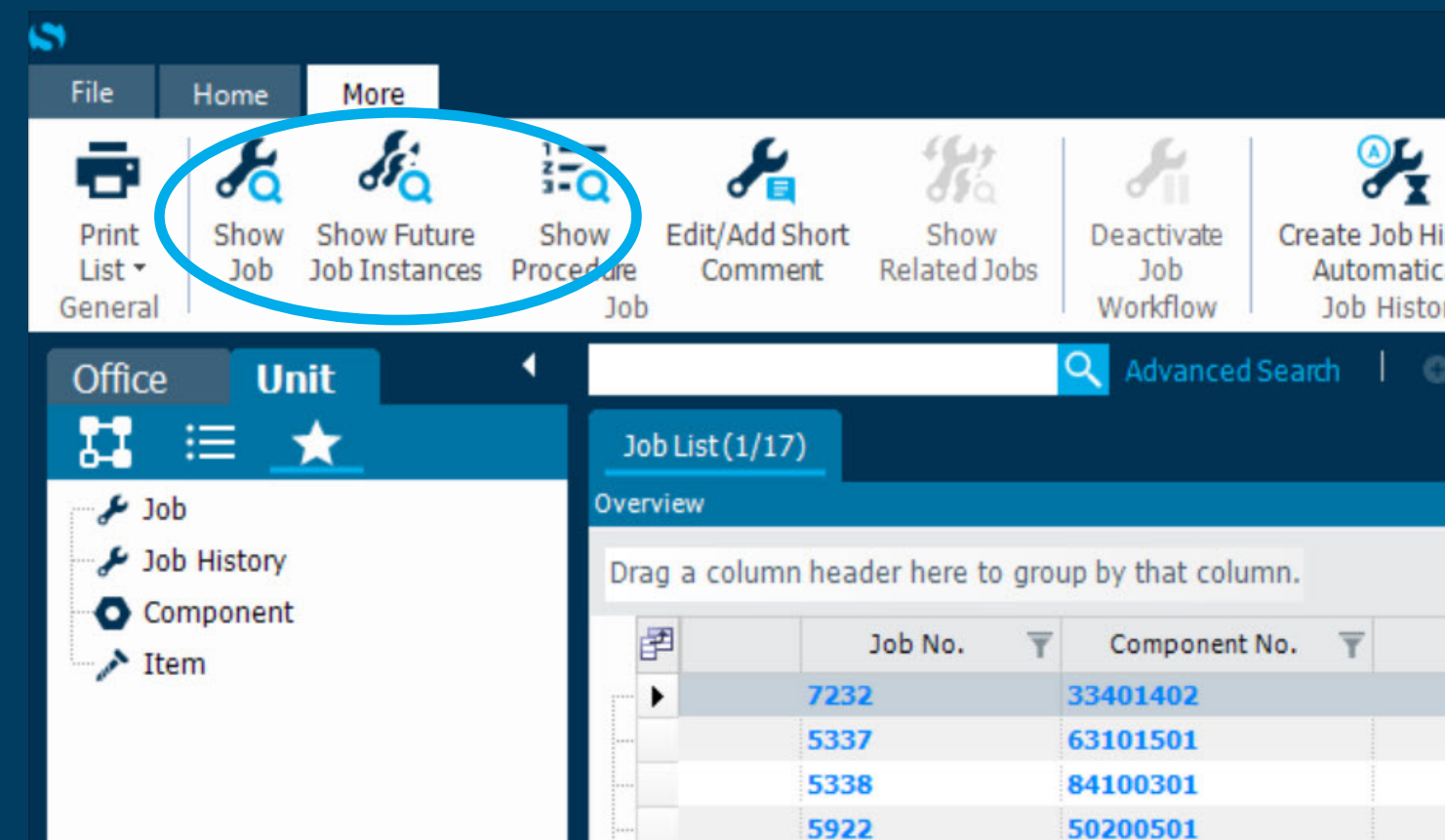
### #14

You can share your saved queries on the *Job List* with other users. Select which users you want to share the query with inside the save dialog.

### #15

You can see when future jobs will happen (further than the next job instance) using the *Show Future Job Instances* button on the *Job List* screen. Note: This requires pre-calculation by using the task scheduler with the parameter `/CalculateFutureJobInstances`.

Future job instances can also be listed using the built-in report in the Analytics module.



The screenshot shows the SERTICA Job List interface. The 'More' tab is active, displaying several buttons: 'Print List', 'Show Job', 'Show Future Job Instances', 'Show Procedure Job', 'Edit/Add Short Comment', 'Show Related Jobs', 'Deactivate Job Workflow', and 'Create Job History'. The 'Show Future Job Instances' button is circled in blue. Below the buttons, the 'Unit' tab is selected, showing a list of jobs with columns for Job No. and Component No.

Job No.	Component No.
7232	33401402
5337	63101501
5338	84100301
5922	50200501

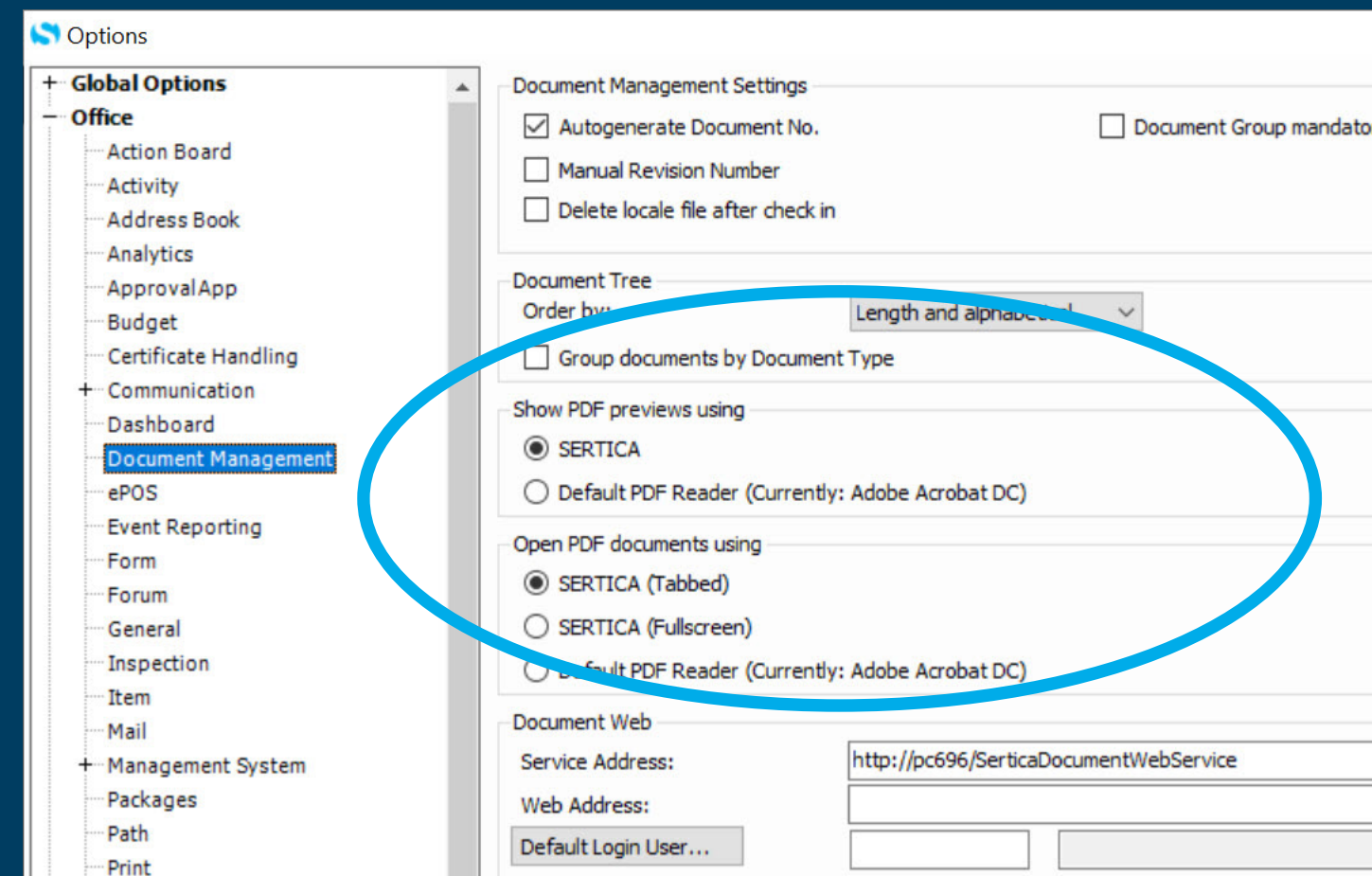
## Document

### #16

You can build alternative views of structures in *Document Tree* using *Document Folders* or *Alternative Structures*. This can be used to show a selection of specific documents relevant for different users.

### #17

SERTICA has a build-in previewer for documents. It works with various types of documents such as MS Office & PDF. It requires no installation of third-party programs on client computers and will work fast and reliable. The SERTICA previewer can be activated in options by the administrator.





## Actionboard

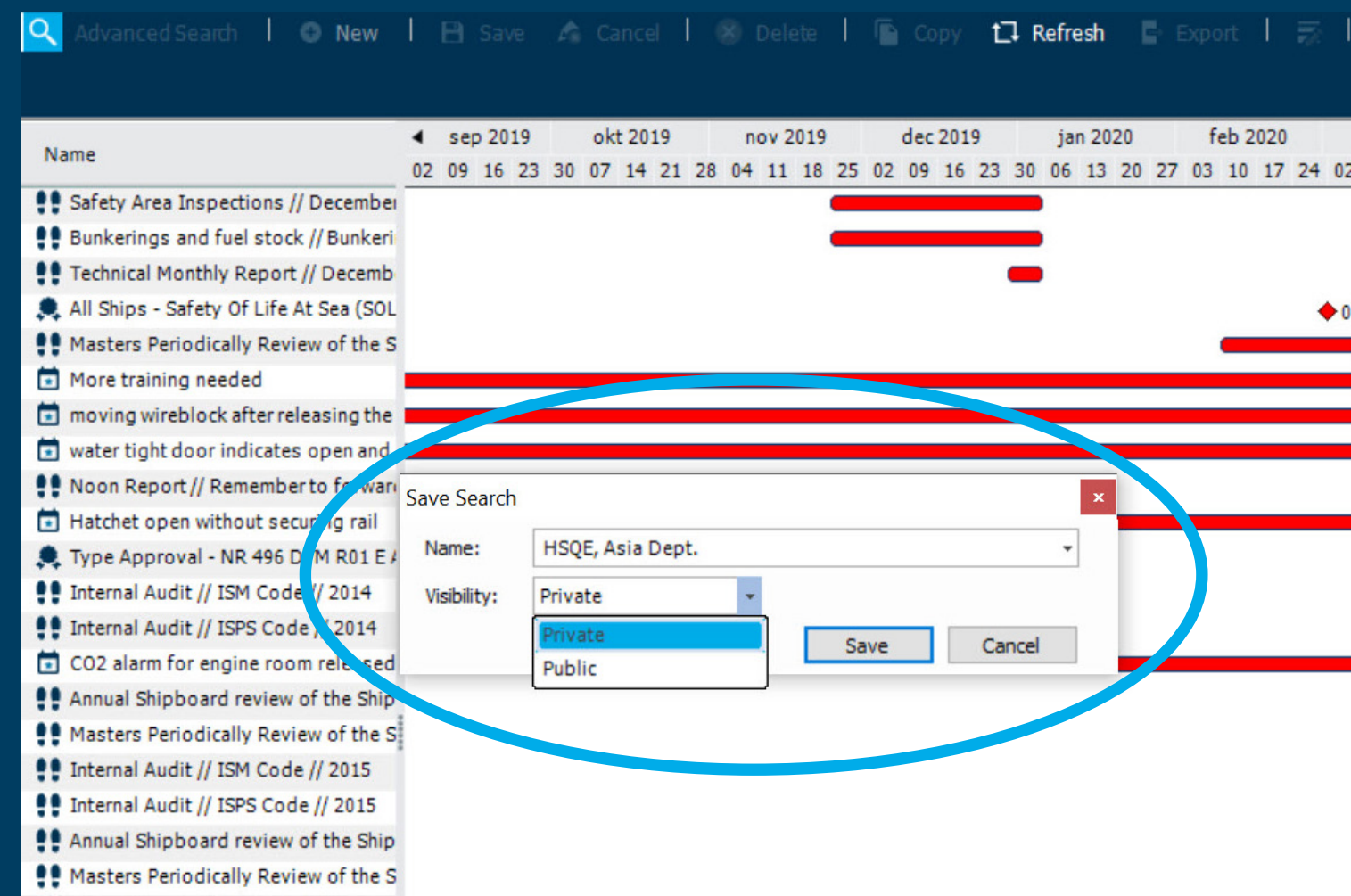
### #18

Users can make and save their own private queries on the action board. The query can include units, activity types, event types and certificate types. This can be enabled with user rights.

### #19

It is possible to create predefined queries on the action board and share them with the entire fleet. This makes it possible to create custom queries that matches your organization and share them. This can be enabled with user rights.

If your administrator has enabled this function, you just select the items you wish to show on the dashboard and save it (save button in the top right corner). The save dialog lets you decide if the saved query should be private or public (shared with other users).



## Analytics



### #20

You can link Analytics reports to many screens in SERTICA. As an example, you can add a button to the *Component* screen to show Top 10 Breakdown Components, or to the *Job History* screen to show related job histories for the past year.

It is possible to extract data based on a selected report created in Analytics. You link the reports to the screen called *Analytics Screen Configuration* found in the office menu. Output can be exported directly into SERTICA or Excel.

### #21

Use Custom Analytics if you need advanced reports or reports combining special fields and data. For ease of use, you can add the reports to the *Task List* for everybody to use or you can restrict access.

Examples of reports:

- Internal KPI's analyzing the efficiency of the procurement department
- Turn-around time from quote to purchase order to midpoint receipt at transit warehouse
- Individual performance compared with company targets



## ***Email Notifications***

### **#22**

SERTICA can send email notifications for various types of events in SERTICA.

Examples of notifications:

- A form needs approval
- A certificate is about to expire
- A job is close to its due date
- A request for quote is rejected



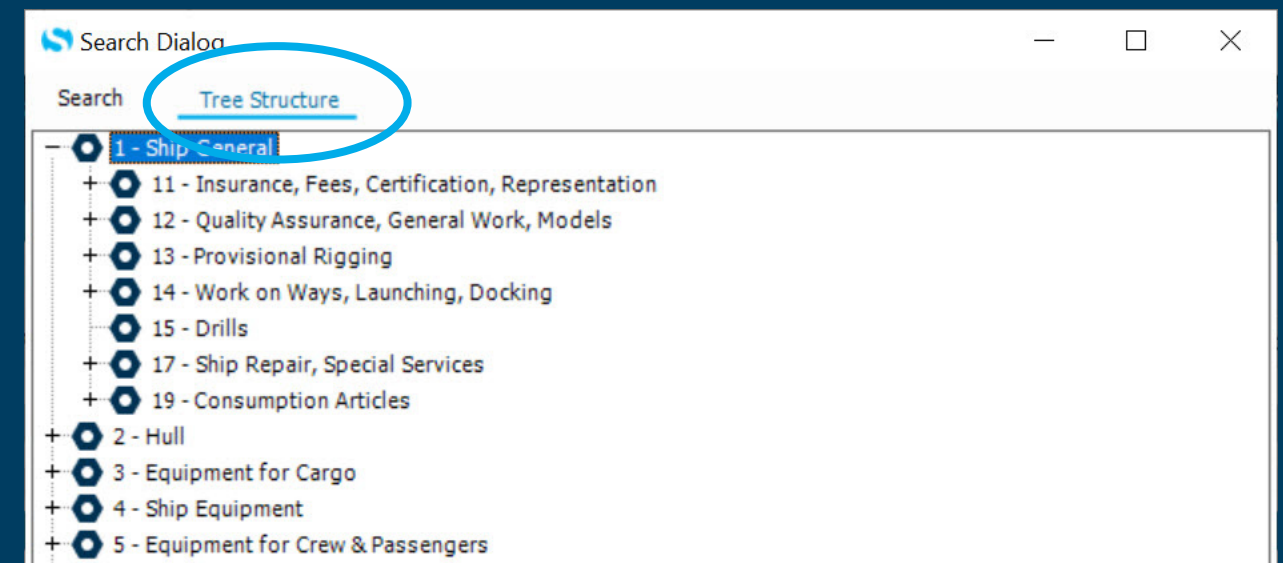
## Search

### #23

You can configure the initial search on screens. This makes it possible to show data when the screens open, based on the criteria you want. Initial searches can be maintained in the search dialog.

### #24

When looking up structured data in some search dialogs, you can switch to a tree view to look up the record you need. For example, when finding a component or item for a job.



## #25

**Ctrl+F** opens the search dialog. The secret is that **Ctrl+F+F** (hold Ctrl. and enter two F's) recalls the last search - if you just need to adjust one parameter in a complex search.

## #26

You can search for specific words in PDFs and Word documents in Document Management and the Management System modules. This can be setup on the server and can afterwards be used by all users.

## #27

Use the **CTRL+Space** shortcut to move the cursor to the search field in the top of SERTICA. This is a quick way to start a search.



## Procurement

### #28

If the currency is changed on a purchase order, you can still see which currency the original approved amount is in. This is included in the approval grid on the purchase order.

### #29

In Procurement you can import the latest currency rates from a range of supported sources, such as The Danish National Bank or ECB. This can be configured in options.

The screenshot shows the 'Options' dialog box with a tree view on the left and a settings panel on the right. The 'Reference exchange rate import settings' section is highlighted with a blue circle. It includes fields for 'XML file location (URI)', 'Import file standard currency rate' (set to 1), and buttons for 'Test' and 'Import'. Below these, it lists supported XML sources: the European Central Bank and the Danish National Bank, with their respective URLs.

**Options**

- + Global Options
  - Office
    - Action Board
    - Activity
    - Address Book
    - Analytics
    - ApprovalApp
    - Budget
    - Certificate Handling
    - + Communication
    - Dashboard
    - Document Management
    - ePOS
    - Event Reporting
    - Form
    - Forum
    - General
    - Inspection
    - Item
    - Mail
    - + Management System
    - Packages
    - Path

**Currency**

Std. Currency... DKK Danish Kroner

☐ Round Subtotals

**Company**

Std. Company... LMCS Logimatic Shipping Ltd.

**Reference exchange rate import settings**

XML file location (URI):

Import file standard currency rate: 1

Test

Import

XML files from European Central Bank and the Danish National Bank are supported:

<http://www.ecb.europa.eu/stats/eurofxref/eurofxref-daily.xml>

[http://www.nationalbanken.dk/\\_vti\\_bin/DN/DataService.svc/CurrencyRatesHistoryXML?lang=da](http://www.nationalbanken.dk/_vti_bin/DN/DataService.svc/CurrencyRatesHistoryXML?lang=da)

**Account**

☐ Available to: List of Units also limits Office

**Class**

☐ Enable Unit Filter on Class

☐ Available to: List of Units also limits Office

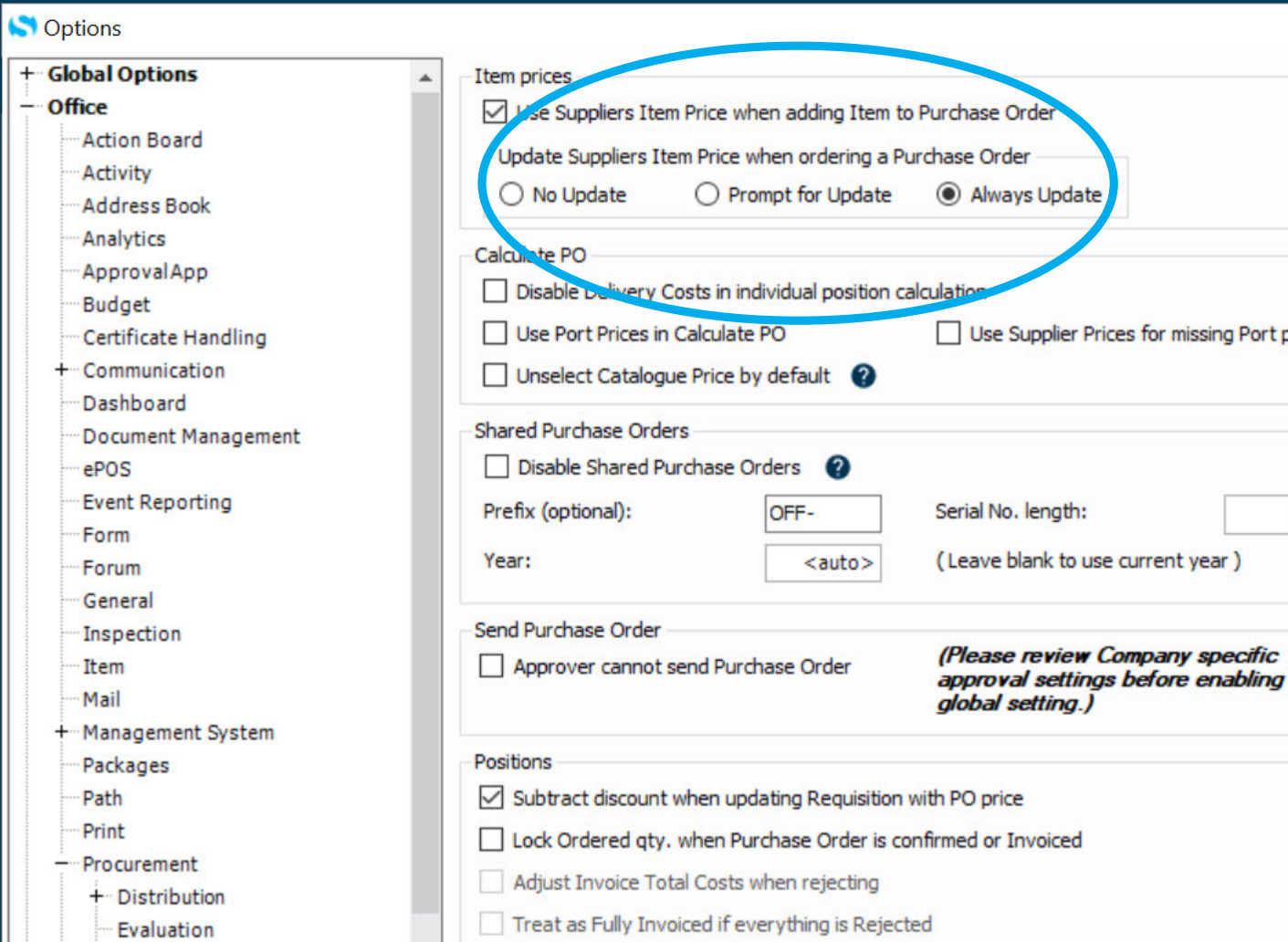


# Settings

## #30

Configure SERTICA to update item prices from suppliers when ordering a purchase order in *Options*. When a purchase order is ordered, the supplier prices of those items will be updated with the price information from the purchase order.

Find the settings in options under *Office* → *Procurement* → *Purchase Order* → *Item prices*.

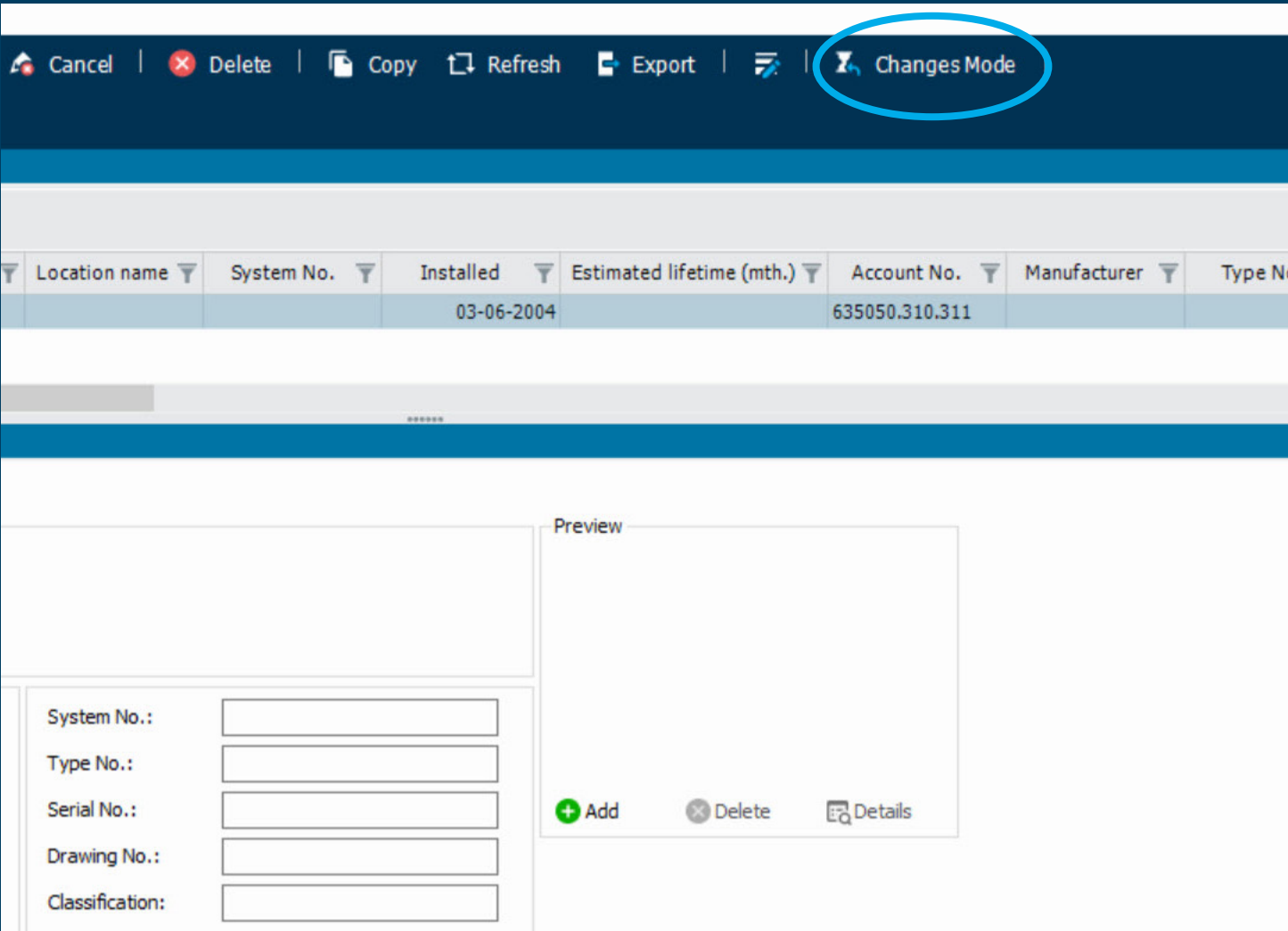


#31

In *Favorites* you can build your own favorite menu list. Right click an item in the *Office* or *Main menu* and select to add it to *Favorites*.

#32

SERTICA offers history mode in most screens, allowing you to see change history for a specific record. On all standard screens in SERTICA, you have a button named *Changes mode*. Find the record you wish to see the history for and press the button to see a list of all changes. Press the button again to close the change log.



## Screen Layout



### #33

Move windows around as you like and build your own layout.

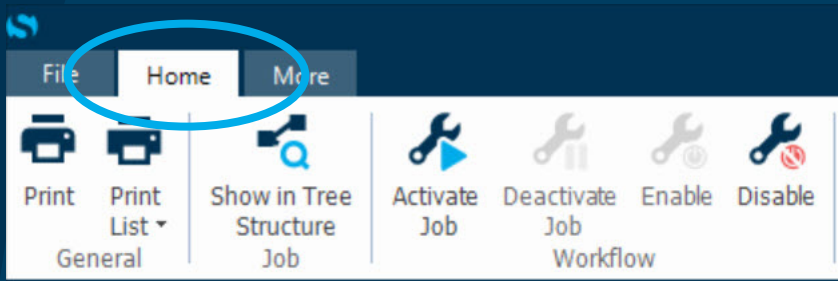
### #34

If you “get lost” when moving windows around when changing the layout, just press the *Reset Screen Layout*. This will take you back to the initial layout of the screen you are currently on.



#35

Double-clicking the *Home* tab above the action bar unpins and hides the action bar, making more room for the detail and reference areas on screens.

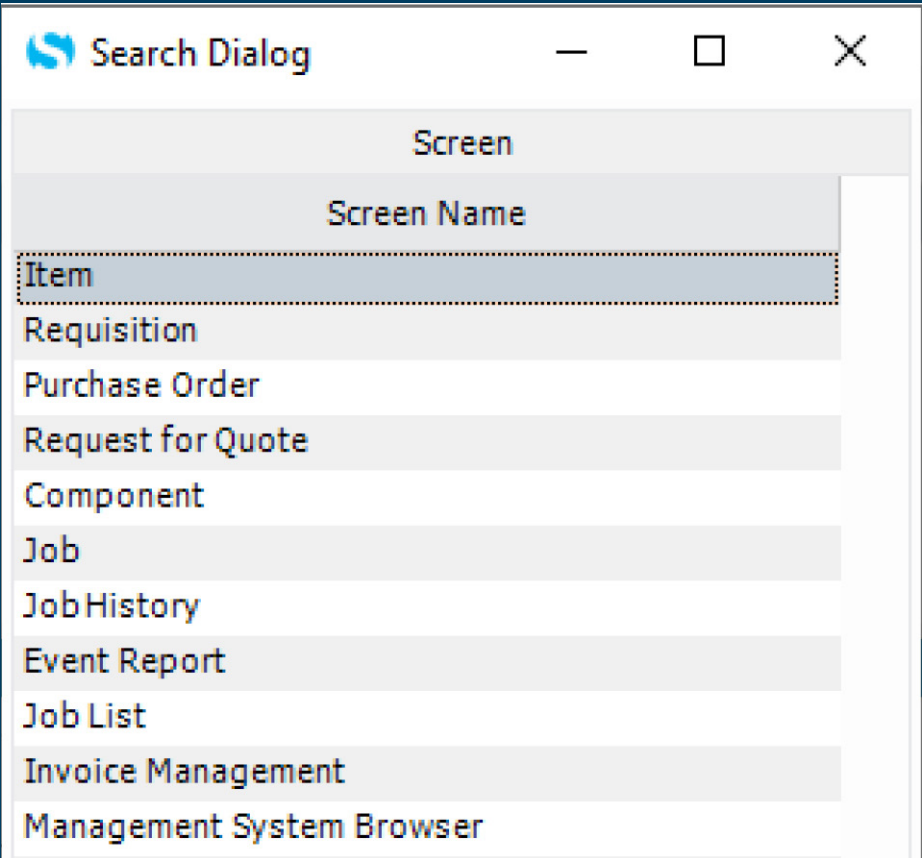


#36

Your administrator can create customized button layouts and thereby simplify the use of your SERTICA Job screen and other larger screens. Set up simple layouts for different user groups for many different screens.

Buttons can be hidden entirely, or less-used buttons can be moved to a *More menu*. Activate this for the user under user interface on the *User* screen.

The configuration is done from the *Button Layout* Screen. See the screenshot for the list of screens where the functionality is available.



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## The Administrator



### #37

The administrator can setup secure passwords and password expiration in options under *Global Options* → *Security* → *Security Settings*.

### #38

The administrator can add the users' domain names to their account in SERTICA. This will make login faster as no password is required.

## #39

The administrator can enable auto logoff to enhance security. It is possible to control the time of inactivity before users will be logged out. This can be configured in options.

## #40

You can disable transaction size limit on Management System Documents. MS Documents are important, and it is crucial that they are synchronized to vessels. This will ensure that SERTICA always sends them to vessels. The size limit can be activated in options by the administrator.

## #41

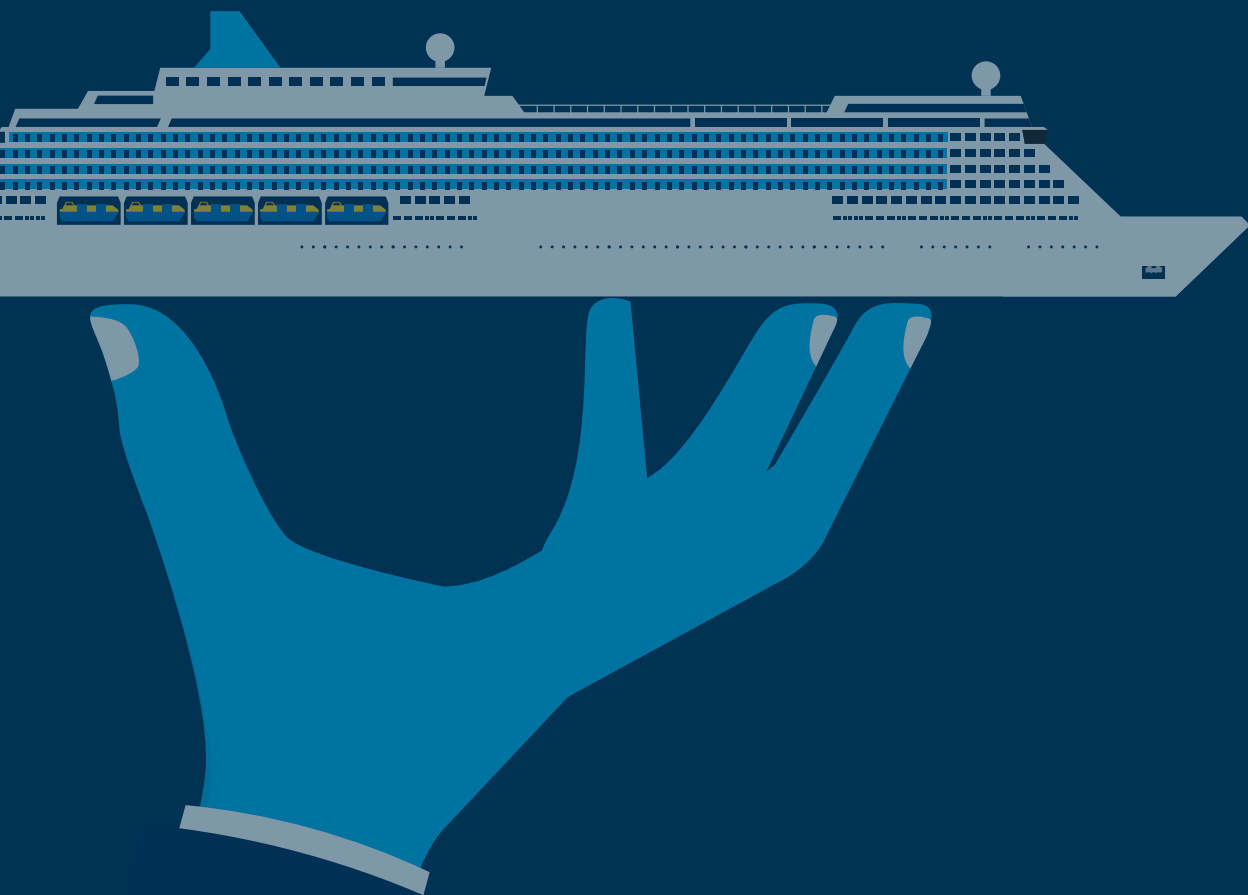
When publishing a Management System, it is possible to email changes to relevant users. The changes will be included in the mail as a PDF file. Controlled copies should be used for this. See [chapter 4.3](#) of user guide to get help setting up the controlled copies.

## #42

The MS *Browser* screen in SERTICA can show bookmarks from documents. This makes it possible to import and view document bookmarks inside SERTICA. It is possible to navigate between them and easy get to the right place in the document. This can be activated in options.



## Get help



### #43

You always have access to updated manuals. There is a very generic help file inside SERTICA and How-To guides and e-learning guides can be found on SERTICA Web library. Contact support if you need a manual.

### #44

Sign up to the newsletter *What's New* and get information about new functionality in your inbox.

What's New in SERTICA: *File* → *Help* → *What's New* (internet access required).

### #45

Contact support for further instructions:  
[support@sertica.com](mailto:support@sertica.com)

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