



**BEYOND**  
**CUES**

# User Guide



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# Preface

This documentation contains information on how to install and operate **Beyond Cues** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond Cues**.

Read this documentation in full to set up **Beyond Cues** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of **Beyond Cues** and keep the documentation in a place that is accessible to your employees.

DOWNLOAD  
PDF

## Manufacturer

**Beyond Cues** is developed by:

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VISIT  
APPSOURCE

## Version history

Version	Date	Author	Comment
1.0	22.03.2023	Jannic Weidel	Initial version of the documentation
1.1	10.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
1.2	08.11.2023	Jannic Weidel	Update of the documentation for Beyond Cues Version 2.0
1.3	29.10.2024	Jannic Weidel	Added description for primary key feature
1.4	27.02.2025	Jannic Weidel	Rework of the screenshots, Added contents for Departments
1.5	12.06.2025	Jannic Weidel	Added Preface Chapter
Access		public	

# General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

## TIP

This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

## NOTE

This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

## IMPORTANT

This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems. May affect user experience or functionality if not considered.

## CAUTION

This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity. Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

## WARNING

This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system. Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported.

**Beyond Cues** is an extension for Microsoft Dynamics 365 Business Central.

Make your employees' everyday life easier and increase productivity at the same time.

**Beyond Cues** adds an area to your role center where you can configure so-called "cues". Among other things, the cues can be configured to display important information about business processes while allowing quick navigation to filtered pages.

The cue area in the Role Center can be configured individually for each user, all users or user groups and offers numerous options for setup:

- Facilitate the work of purchasing staff by creating a cue that displays the number of open purchase orders that have not yet been delivered.
- Quickly and easily collect figures such as total sales orders per month at any point in time.
- Help warehouse staff by configuring a cue for empty storage bins or displaying current stock transfer orders directly in the roll center.
- etc.

The latest version of this documentation can be found at the following link: [Beyond Cues Documentation](#).

The examples described in this documentation represent only a part of the possibilities that the **Beyond Cues** solution offers you. If you have a specific case that you would like to map via the solution, please feel free to contact us.

#### NOTE

##### **Dependencies on or to other apps**

Additional, basic applications are required to use **Beyond Cues**. The following applications are required to use **Beyond Cues**:

- [Beyond License](#): Management of trial and full licenses for apps of BeyondIT.

# License Management

This chapter describes how you can view the license management of **Beyond Cues**.

To view the status of the product license for **Beyond Cues**, proceed as follows:

- 1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
- 2. The **Beyond License Management** page is displayed.

Beyond License Management

Tenant ID

Tenant Domain Name

Licenses

Sync License

Company Name	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric
→	BeyondCalculation	Valid	23.08.2024 08:50	22.08.2030 08:50	<input type="checkbox"/>	1	0
	BeyondServiceRequestion	Valid	02.04.2024 09:13	02.05.2030 09:13	<input type="checkbox"/>	1	0
	BeyondPostCalculation	Valid	14.08.2024 00:33	13.06.2030 00:33	<input type="checkbox"/>	1	0
	BeyondReportReview	Valid	15.07.2024 21:26	14.06.2030 21:26	<input type="checkbox"/>	1	0
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondInventoryDetails	Valid	29.01.2024 23:28	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55	<input type="checkbox"/>	1	0
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42	<input type="checkbox"/>	1	0
	BeyondAttributionCore	Valid	14.06.2024 07:51	14.07.2030 07:51	<input type="checkbox"/>	1	0
	BeyondReports	Valid	05.07.2024 06:39	04.06.2030 06:39	<input type="checkbox"/>	1	0
	BeyondDocumentLineTransfer	Valid	19.06.2024 20:40	31.12.2099 00:00	<input type="checkbox"/>	4	0

- 3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	<p>This is the status of the product license. Several values are possible:</p> <p><b>Valid:</b> The product license is valid and the application can be used without restrictions.</p> <p><b>Expired:</b> The product license has expired. The application can no longer be used.</p> <p><b>Trial:</b> The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the <b>expiry date</b> column) with restrictions or without restrictions.</p> <p><b>Exceeded:</b> The product license has expired. The application can no longer be used.</p>
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the <b>Expiry date</b> column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the <b>Licensed metric</b> and <b>Current metric</b> columns indicates whether you need to purchase an additional license.

# Assign User Permissions

This chapter describes how to assign the various user permissions to Beyond Cues users. The following permission sets are predefined for Beyond Cues users:

- BYD CU Admin
- BYD CU User

To help distinguish which permission a user needs to work with Beyond Cues, the permissions are summarized below:

Features/Permission	BYD CU Admin	BYD CU User
Display and use Cues	X	X
Create, edit and delete Cues	X	-
Import and Export Cues	X	-
Create Display Groups for Cues	X	-
Configure Display of Cues for User Groups	X	-

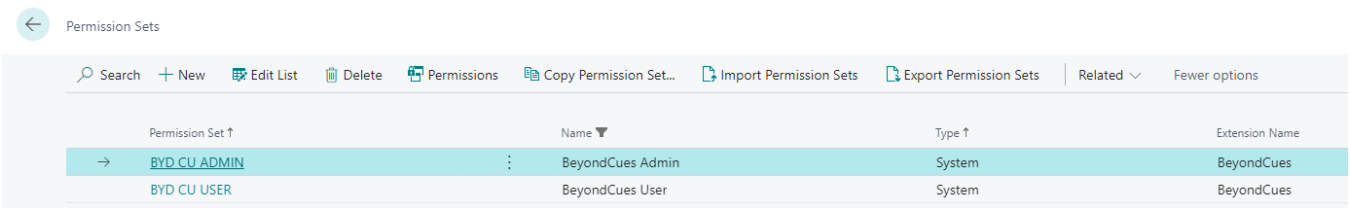
For more information on how to assign user permission to a user, see the chapters below:

- [Assign admin permissions for Beyond Cues](#)
- [Assign user permissions for Beyond Cues](#)

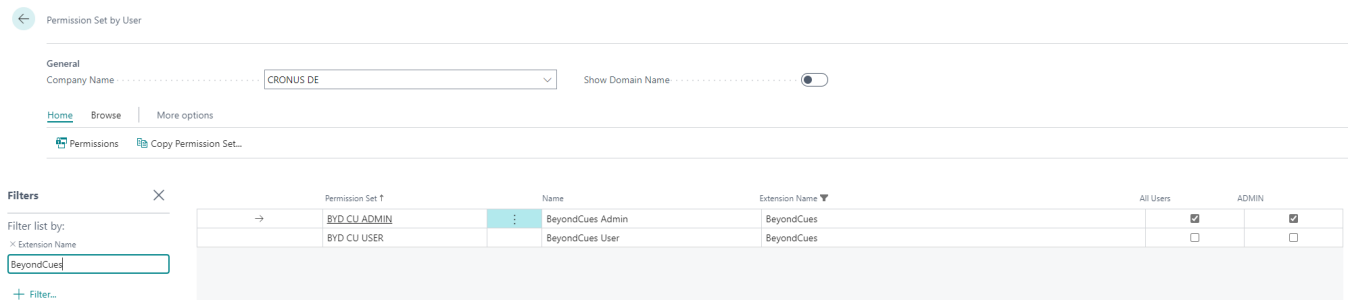
## Assign admin permissions for Beyond Cues

This section describes how to assign admin permission for Beyond Cues to a user. To do this, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Permission Sets** and click on the corresponding search result.
3. The **Permission Sets** page is displayed. On this page you will find the permission sets mentioned above for using Beyond Cues.



4. Select the **BYD CU ADMIN** permission set from the list.
5. In the menu bar, click **Related > Permissions > Permission Set by User**.
6. The **Permission Set by User** page is displayed.
7. To display only relevant permissions for BEYOND Cues in the table, we recommend that you filter the display. Open the filter area of the table (**CTRL+SHIFT+F3**) and define **Extension Name** with the value **BeyondCues** as filter criterion.
8. The display will be updated to show only the above permissions.
9. For the corresponding user in the **BYD CU ADMIN** line, select the check box under the column.





You have assigned administrative permissions to the user. The permission set has basic permissions to use Beyond Cues, plus administrative permissions to create, edit, delete, and translate cues.

**NOTE**

**Permission Set SUPER**

Note that the **SUPER** permission set controls all permissions. For users who have assigned the **SUPER** permission set, you do not need to assign a permission set for Beyond Cues.

# Assign user permissions for Beyond Cues

This section describes how to assign user permission for Beyond Cues to a user. To do this, proceed as follows:

- 1. From the role center, open the search function (**ALT+Q**).
- 2. Search for **Permission Sets** and click on the corresponding search result.
- 3. The **Permission Sets** page is displayed. On this page you will find the permission sets mentioned above for using Beyond Cues.

← Permission Sets

Search	New	Edit List	Delete	Permissions	Copy Permission Set...	Import Permission Sets	Export Permission Sets	Related	Fewer options
Permission Set ↑		Name ▼	Type ↑	Extension Name					
→ BYD CU ADMIN	:	BeyondCues Admin	System	BeyondCues					
BYD CU USER	:	BeyondCues User	System	BeyondCues					

- 4. Select the **BYD CU USER** permission set from the list.
- 5. In the menu bar, click **Related > Permissions > Permission Set by User**.
- 6. The **Permission Set by User** page is displayed.
- 7. To display only relevant permissions for BEYOND Cues in the table, we recommend that you filter the display. Open the filter area of the table (**CTRL+SHIFT+F3**) and define **Extension Name** with the value **BeyondCues** as filter criterion.
- 8. The display will be updated to show only the above permissions.
- 9. For the corresponding user in the **BYD CU USER** line, select the check box under the column.

← Permission Set by User

General

Company Name: CRONUS DE

Show Domain Name: ☐

Home

Browse

More options

Permissions

Copy Permission Set...

Filters

Filter list by:

× Extension Name

BeyondCues

Permission Set ↑	Name	Extension Name ▼	All Users	ADMIN
BYD CU ADMIN	BeyondCues Admin	BeyondCues	<input type="checkbox"/>	<input type="checkbox"/>
→ BYD CU USER	BeyondCues User	BeyondCues	<input type="checkbox"/>	<input checked="" type="checkbox"/>

You have assigned general permissions to the user. The permission set has basic permissions to use Beyond Cues.

**NOTE**

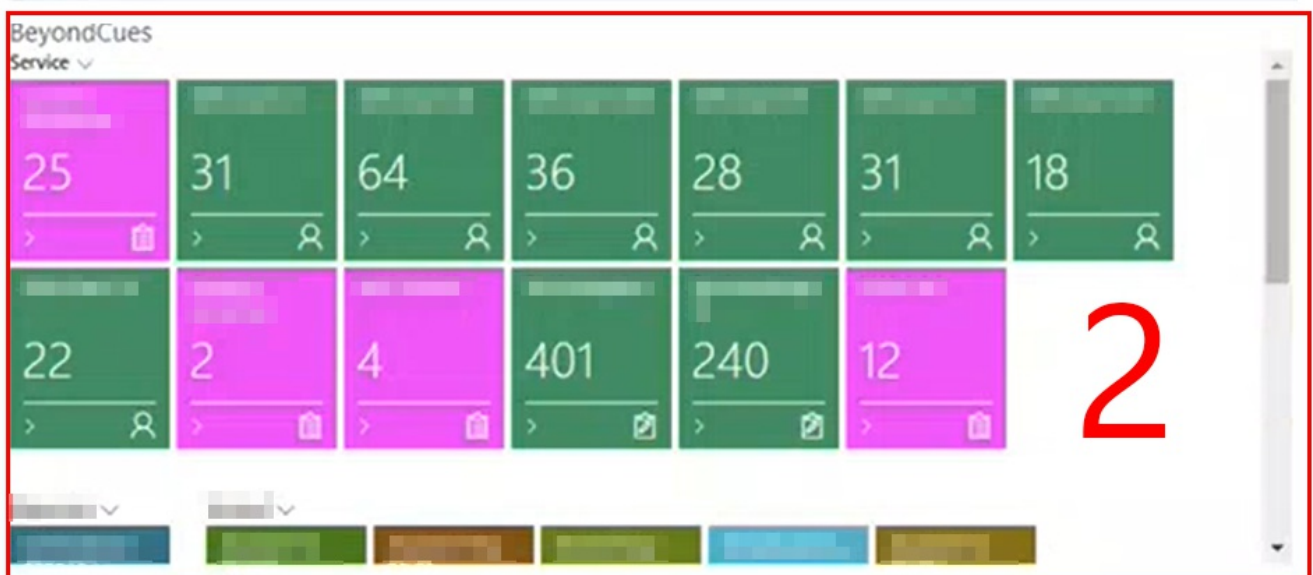
**Permission Set SUPER**

Note that the **SUPER** permission set controls all permissions. For users who have assigned the **SUPER** permission set, you do not need to assign a permission set for Beyond Cues.

# Setup Display Area

To display your configured cues, you have two different-sized display areas available for your role center:

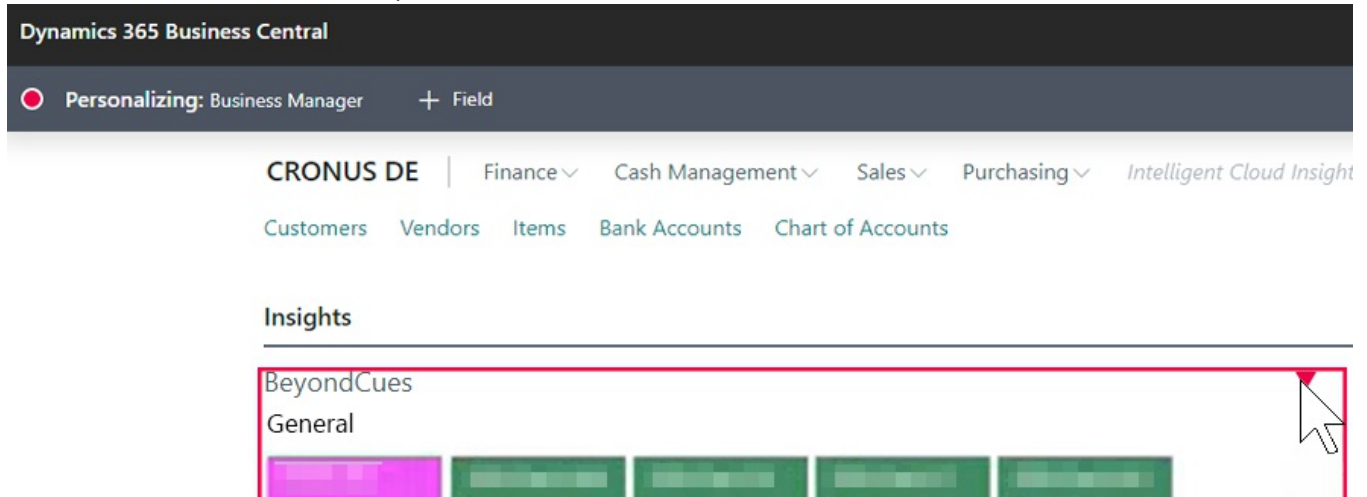
1. Larger display area with a height of 800 px (**BYD CU Cues Activities**)
2. Compact display area (**BYD CU Cues Act. Variable**)



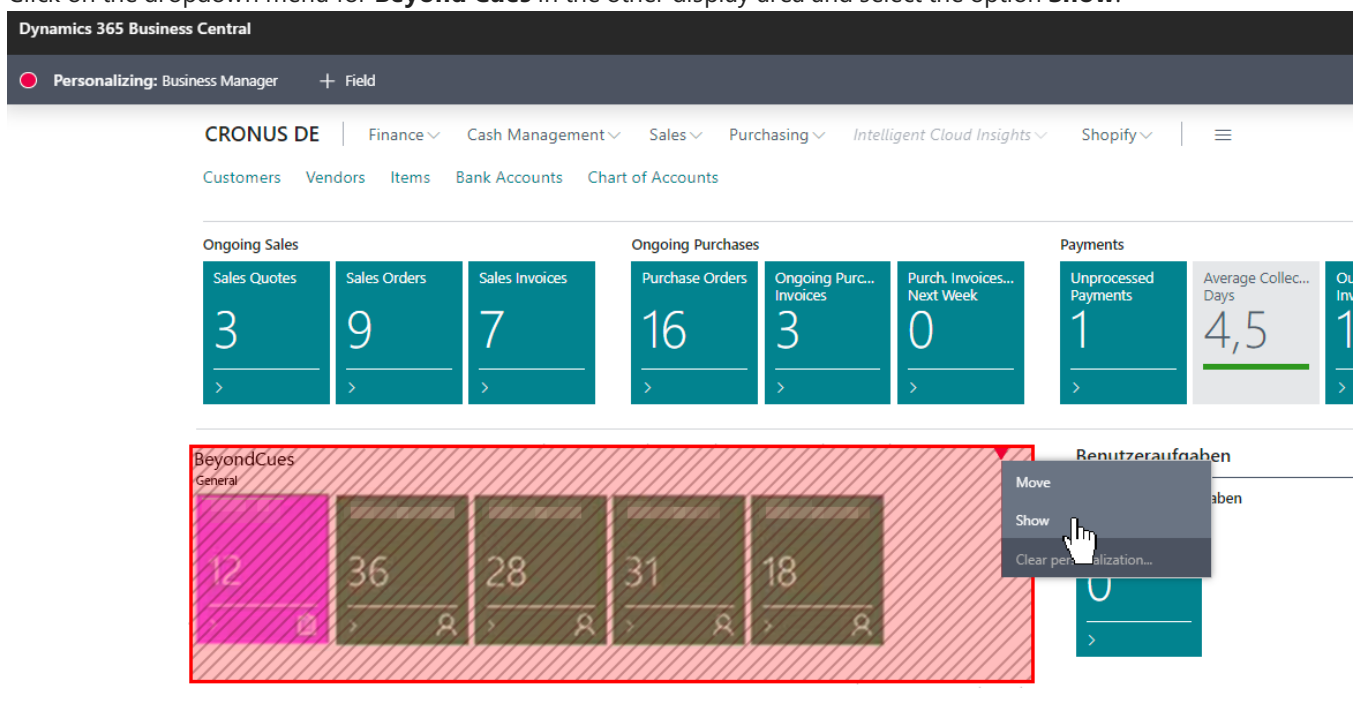
The large display area (1) is enabled by default when you install Beyond Cues from the Microsoft AppSource.

In the following guide, we will describe how you can set up the alternative compact display area (2):

1. Open Business Central in your web browser and sign in.
2. The Role Center is displayed.
3. Click on the gear icon at the top right corner of the screen.
4. Select the option **Personalize** from the dropdown menu.
5. Move the mouse cursor over the large display area for **Beyond Cues**. The display area will be outlined in red.
6. Within the red outline, click the dropdown menu with the left mouse button.



7. Select the option **Hide** from the displayed options.
8. The large display area will be marked with diagonal lines. This means that the display area will not be shown in the role center after personalization.
9. Click on the dropdown menu for **Beyond Cues** in the other display area and select the option **Show**.



10. The display area will be shown without diagonal lines. This means that the display area will be visible in the role center after personalization.
11. Click on the **Done** option at the top right corner of the screen. This will complete the customization of the role center.
12. The display is updated.

You have set up the compact display area for Beyond Cues.

# Change Sorting Order

This chapter describes how to change the order of cues or display groups in the Role Center. The contents of this chapter are divided into the following sections:

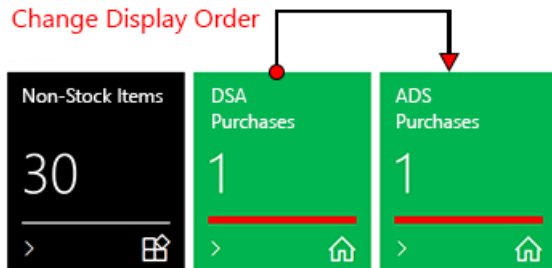
- [Change Sorting Order of Cues](#)
- [Change Sorting Order of Display Groups](#)

Sorting of cues and display groups is controlled by the value of the **Sorting No.** field on the **Beyond Cues** page and the display groups. By default the value **10** is used, if a cue or display group has already been created, the system will increment the last used value by **10**. This allows you to change the sorting order afterwards.

## Change Sorting Order of Cues

This section describes how to change the sorting of cues.

Change Display Order



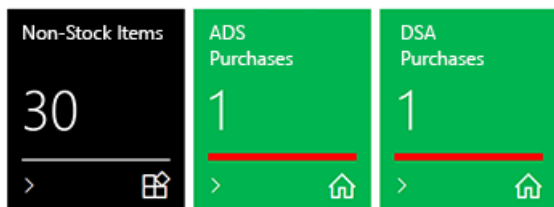
To change the sorting of cues, proceed as follows:

1. Open the search box (ALT+Q) and search for the **Beyond Cues** page.
2. The **Beyond Cues** page is displayed.
3. In the **Sorting No.** column, numerical values are displayed for the configured batches.
4. To change the sorting order of the cues within a display group, click the value for the configured cue under the **Code** column.
5. The **Cue** card is displayed.

The screenshot shows the 'Cue' card for 'DSA Purchases'. The card has a header with 'DSA Purchases' and a sub-header with 'Translations', 'Actions', 'Cue Assignment', and 'More options'. Below this is a 'General' section with fields for 'Code', 'Title', 'Group Code', and 'Sorting No.'. The 'Sorting No.' field is highlighted with a red box and contains the value '20'. To the right of the 'Sorting No.' field is a 'Cue Icon' section with various icons. At the bottom, there is a 'Cue Color' section with a green color swatch and a 'Reset Color' button.

6. Edit the value in the **Sorting No.** field for the selected cue. Increase or decrease the value in increments of ten.
7. On the **Beyond Cues** page, check that there are no equal values in the **Sorting No.** field and that the values are sufficiently sized. Adjust the sort number of other cues if necessary.

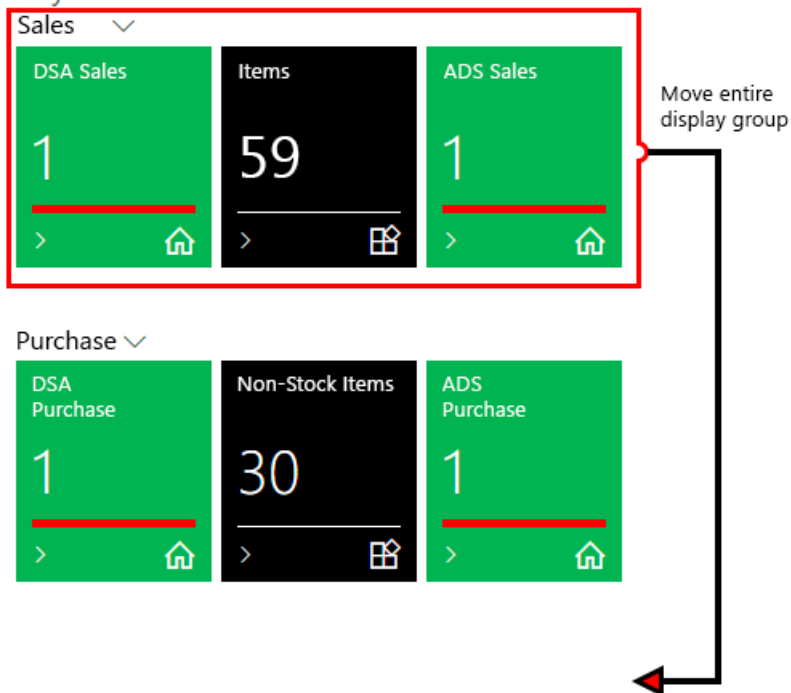
In the example shown, the value for the **DSA Purchases** cue in the **Sorting No.** field has been increased from **20** to **30**, and the value for the **ADS Purchases** cue in the **Sorting No.** field has been decreased from **30** to **20**. The change to the sorting numbers will cause the cues to be moved in the Role Center. Refresh the Role Center with the **SHIFT+F5** key combination to verify the changes to the display order.



## Change Sorting Order of Display Groups

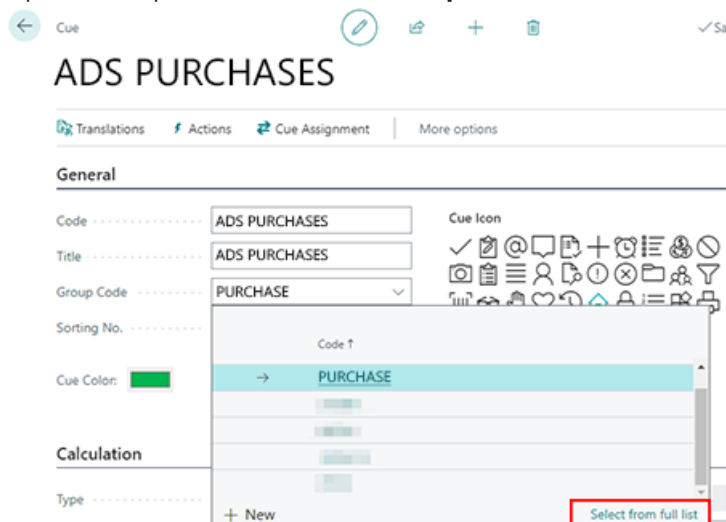
This section describes how to change the sorting of display groups.

### BeyondCues



To change the sorting of display groups, proceed as follows:

1. Open the search box (ALT+Q) and search for the **Beyond Cues** page.
2. The **Beyond Cues** page is displayed.
3. Click on any cue under the **Code** column.
4. The **Cue** card is displayed.
5. Click on the pen icon to be able to edit the data on the **Cue** card.
6. Open the dropdown menu for the **Group Code** field and select the **Select from full list** option.

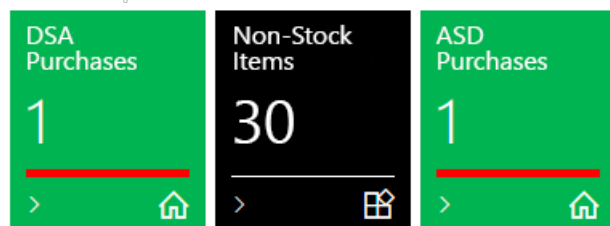


7. The **Select - Cue Group** window is displayed.
8. Click **Edit List**.
9. Edit the value in the **Sorting No.** field for the display group you want to move. Increase or decrease the value in increments of ten.
10. Adjust the sorting number of other display groups if they have the same values for the **Sorting No.** field.

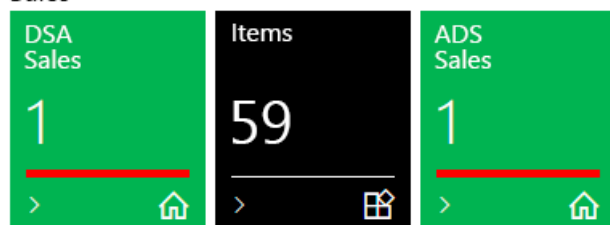
In the example shown, the value for the **Sales** display group in the **Sorting No.** field was increased from **10** to **20** and then the value for the **Purchase** display group in the **Sorting No.** field was decreased from **20** to **10**. The change to the sorting numbers will cause the display groups to be moved in the Role Center. Refresh the Role Center with the key combination **SHIFT+F5** to check the changes to the sequence.

## BeyondCues

Purchase ▾



Sales ▾




# Create Cue

This chapter describes how to create a cue.

You can use the export to make a backup copy of the configured cues. This is particularly useful if you want to transfer your cues to a test system or to another company outside your environment.

There is a separate function for exporting and importing cues within your environment; you can find more information on this in the chapter [Copy Cues to another client](#).








 NOTE

Permissions required

It is only possible for certain users to create a cue. You must have the **BYD CU ADMIN** or **SUPER** permission set. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To create a cue, proceed as follows:

1. From the Role Center, open the search (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **New** in the menu bar.
5. The **Cue** card is displayed.



Cue

TranslationsActionsCue AssignmentMore options

General

Code

Title

Group Code

Sorting No.

Update Interval

0

Cue Color

Reset Color

Cue Icon

✓

✗

@

💬

📄

+

🕒

📋

💰

🚫

📷

📋

☰

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👁️

🔧

🔍

⚙️

🔄

Calculation

Show less

Type

Average

Header Table Name

—

Header Table Filter C...

Table Name

—

Table Key

0

Descending

☒

Field Name

Table Filter Code

Header Table Links

0

Page Name


—

6. Under the **General** tab, enter a code for the cue in the **Code** input field. After entering, a preview of the stack is displayed in the lower right area.
7. Enter a title for the cue in the **Title** input field. The preview is updated and shows how the configured cue will later be displayed in the role center. The title can be translated for different display languages. For more information, see the



section [Add translation for Cue](#).

8. Under **Group Code**, select a display group or create a new group. Note that the display group is displayed as a tab on the role center and divides one or more cues. You can define a translation for the group via the menu bar so that the translation for the display group is used when the display language of the interface is changed. Further information on this can be found in the chapter [Add Translation for a Display Group](#).
9. Enter a value in the **Sorting No.** field to define the order of cues within the selected group. You can also define a sorting order at group level.
10. Under the **Update Interval** field, enter a time interval in minutes that is used to update the cue.
11. Under **Cue Color**, specify the color for the cue.
12. Select a suitable icon for your cue from the available icons.
13. Under the **Calculation** tab, in the **Type** field, select which cue type you want to create. The following options are available for this:
  - **Average**: The cue should reflect an average (for example, the average of all amounts from sales orders).
  - **Count**: The cue should reflect a number (for example, the number of catalog items or number of customers without a VAT ID).
  - **Exists**: The cue should reflect a yes or no value (for example, check if there are open approvals for an employee).
  - **Lookup**: The cue should provide a filtered view (for example, the sales quotes of a particular employee).
  - **Sum**: The cue should reflect a sum (for example, the sum of the amounts of the sales invoices).
  - **First Field Value**: The cue should show the first value found in the underlying records.
  - **Last Field Value**: The cue should show the last value found in the underlying records.
  - **Compare**: The Cue should compare two field values of a common table and serve as a decision aid/analysis. You can find more information on this in the chapter [Cue with Compare Feature](#).
  - **Function**: The cue should execute a function. As an example, the **Beyond Cues** range of functions includes a preconfigured cue as standard, which shows you the employee whose birthday is next. At the bottom of the cue, you can scroll to the next employee. You can find more information on this in the chapter [Cue with Function Feature](#).
14. Under **Table name**, enter the table you want to use for calculating the cue (e.g. ID **36** for sales header). Click in the field to open the **Table Lookup** window from which you can select the table.
15. In the **Table Key** field, you can optionally define whether the data should be sorted using an available primary or secondary key. Click on the number in the field to select from the available keys for this table. Specifying a key reduces the loading times of the cue data and thus contributes to better system performance.

 ☒ No.

☐ Item No. - Serial No.

☐ Customer No. - Ship-to Code - Item No. - Serial No.

☐ Warranty Ending Date (Parts) - Customer No. - Ship-to Code

☐ Sales/Serv. Shpt. Document No. - Sales/Serv. Shpt. Line No.

☐ Service Item Group Code

☐ Fixed Asset No.

☐ System ID

OK

Cancel

16. You can use the **Descending** slider to sort the sort sequence in ascending or descending order using the key.
17. Open the drop-down menu for the **Table Filter Code** field.
18. Create a new filter, click on **New** in the context menu.
19. The **Select - Table filter** window is displayed.




## General

Table Id .....	<input type="text" value="0"/> ▼	Description .....	<input type="text"/>
Code .....	<input type="text" value="*"/>	Used as Filter .....	<input type="text" value="0"/>
Table Name .....	<input type="text"/>	Used as Header Filter ...	<input type="text" value="0"/>

[Preview...](#)

## Fields

 New Line Delete Line Translations

	Field No. 1	Field Name	Field Type	Field Filter
→	0			

20. Enter a code for the table filter in the **Code** field.
21. Enter a description for the table filter in the **Description** field.
22. Under the **Fields** section, you can filter by field values that are to be applied to the selected table. In this example, we want to filter by the **Quote** document type. Click on the drop-down menu under the **Field No.** column and select the **Document Type** field (ID: 1) from the list.
23. Define the value **Quote** under the **Field Filter** column. You can define a translation for the field filter value so that the field filter can also be used when the display language is changed (if you use the Business Central interface in different display languages). You can find further information on this in the chapter [Add translation for filter value](#).
24. Add the **Status** field (ID: 120) as the second filter criterion and enter the value **Open** as the field filter. In this way, you can now filter for the **Open** status in addition to the **Quote** document type.
25. Close the **Select - Table Filter** window and return to the cue card.
26. Under the **Indicators** tab in the **Condition** table you can define one or more conditions to set up the indicator of the cue (the horizontal line in the cue). Define the condition(s) and select an indicator color.

## Indicators

Manage



	Condition	Value
	<	10
	<	15
	<	20
→	>	20

Indicator Color:



General ▼

Quotes

28

&gt;



You have created a cue. Note that you must assign the cue to users or user groups for it to be displayed in the Role Center. For more information, see the chapter [Assign Cues](#).

# Copy Cue

This chapter describes how to copy the settings of an existing cue to a new cue. To copy a cue, proceed as follows:

1. From the Role Center, open the search function (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page, you will find all configured cues.
4. Select a cue from the list.
5. Click **Copy Cue** in the menu bar.
6. The **Bearbeiten - Copy Cue** is displayed.

Edit - Copy Cue

New Cue Code .....

Copy Indicators .....

Copy Actions .....

Copy Assignments .....

OK

Cancel

7. In the **New Cue Code** input field, enter the code for the new (copied) cue.
8. If you want to copy the indicators of the selected cue as well, activate the **Copy Indicators** slider. For more information on indicators, see the [Create Cue](#) chapter.
9. If you want to copy the actions of the selected cue as well, activate the **Copy Actions** slider. For more information on actions, see the [Create Cue](#) chapter.
10. If you want to copy the assignments of the selected cue as well, activate the **Copy Assignments** slider. For more information on assignments, see the [Assign Cues](#) chapter.
11. Click **OK** to copy the cue.

The selected cue is copied.

# Copy Cue to another Company

This section describes how to copy a cue to another company in your environment.

To copy a cue to another company, proceed as follows:

- 1. Open the search function from the role center (**ALT+Q**).
- 2. Search for **Beyond Cues** and click on the corresponding search result.
- 3. The **Beyond Cues** page is displayed. You will find all configured cues on this page.
- 4. Select one or more cues from the list that you would like to copy to another company.
- 5. Click on **Copy to other Company** in the menu bar.
- 6. The **Companies** window is displayed.
- 7. In the window, select the company to which you want to copy the selected cue/s and click **OK**.

Companies | 🔍 ▾ ⋮ ↗ ✕

Name	Display Name	Evaluati... Company	Enable Assisted Company Setup	Setup Status
→ <u>CRONUS AT</u>	⋮ CRONUS AT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Completed
My Company		<input type="checkbox"/>	<input type="checkbox"/>	Completed

OK Cancel

You have copied the cue to another company in your environment. If you want to copy one or more cues to a company that does not exist in your environment, you can find more information in the [Export Cues](#) and [Import Cues](#) chapters.

# Export Cues

This chapter describes how to export your configured cues from Beyond Cues. You can use the export to make a backup copy of the configured cues. This is particularly useful if you want to transfer your cues to a test system or to another company outside your environment.

There is a separate function for exporting and importing cues within your environment; you can find more information on this in the chapter [Copy Cues to another client](#).

## NOTE

### Permissions required

If you want to import or export cues from Beyond Cues, you must have the **BYD CU ADMIN** or **SUPER** permission. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To export your configured cues, proceed as follows:

1. From the Role Center, open the search function (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **Export Cues** in the menu bar.
5. A JSON file is created and downloaded.

You have successfully exported all configured cues. The JSON file (**Cues.json**) contains all the necessary information about the configured cues. You can now switch to a different environment, for example, and import the cues via the JSON file. You can find more information on this in the chapter [Import Cues](#).

# Import Cues

This chapter describes how to import your configured cues from Beyond Cues.

The import requires a JSON file (e.g. **Cues.json**). This JSON file should contain information about the configuration of one or more cues. You can exchange cues between two mandates in your environment this way.

## NOTE

### Permissions required

If you want to import or export cues from Beyond Cues, you must have the **BYD CU ADMIN** or **SUPER** permission. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To import your configured cues, proceed as follows:

1. From the Role Center, open the search function (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **Import Cues** in the menu bar.
5. A window is displayed. Click the **Choose...** option to specify the path to the JSON file.

Please select a Cues.json file...

Choose...

Cancel

The cues configured in the JSON file are imported and displayed in the **Beyond Cues** page. You can assign the cues to set up the display of cues in the Role Center for all users, user groups, or individual users. For more information, see the [Assign Cues](#) chapter.

# Assign Cue

This chapter describes how to assign a cue for the role center of all users, a user group or a single user. A permission set is required to display and use BEYOND Cues in the Role Center. Without a permission set and the assignment, the cue will not be displayed in the Role Center. For more information on permission sets and how to assign a permission set to use Beyond Cues, see the [Assign User Permissions](#) chapter.

You can assign cues in different ways:

Assignment type	Description
Assign Cue for all Users	You assign the cues for all users, which means all users can see and use the cue(s) in their Role Center.
Assign Cue for a User Group	You assign cues for a user group, which means that all users in that user group can see and use the cue(s) in your Role Center.
Assign Cue for a Specific User	You assign cues to a specific user, i.e. only this selected user can see the cue(s) in the Role Center.

## Assign Cue for all Users

This section describes how to assign a cue for all users.

To assign a cue for all users, do the following:

1. From the Role Center, open the search function (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **Cue Assignment** in the menu bar.
5. The **Cue Assignment** page is displayed.
6. To assign one or all cues to all users, click **Assign for All** in the menu bar.
7. The **Filter Page** window is displayed.

Filter Page

Filter: Cue

X Code .....

+ Filter...

OK

Cancel

8. In the **Code** input field, enter the code of the cue you want to set up for all users in the Role Center. If you want to display all cues for all users in the Role Center, you can also specify an asterisk (\*) in the **Code** input field.
9. To confirm the selection and complete the assignment, click **OK**.

One or more lines are added to the **Cue Assignment** list. From the value in the **Type** column, you can see which assignments

have been created.

## Assign Cue for a User Group

This section describes how to assign cues for a user group.  
To assign cues for a user group, do the following:

- 1. From the Role Center, open the search function (**ALT+Q**).
- 2. Search for **Beyond Cues** and click on the corresponding search result.
- 3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
- 4. Click **Cue Assignment** in the menu bar.
- 5. The **Cue Assignment** page is displayed.
- 6. To assign one or more cues to a user group, click **Assign for User Group** in the menu bar.
- 7. The **Filter Page** window is displayed.

Filter Page

Filter: Cue

× Code .....

+ Filter...

Filter: User Group

× Code .....

+ Filter...

OK

Cancel

- 8. Under the **Filter: Cue** tab, enter the code of the cue you want to set up for the user group in the Role Center in the **Code** input field. If you want to display all cues for the user group in the Role Center, you can also specify an asterisk (\) in the **\*\*Code\*** input field.
- 9. Under the **Filter: User Group** tab, enter the code of the user group in the **Code** input field.
- 10. To confirm the selection and complete the assignment, click **OK**.

One or more lines are added to the **Cue Assignment** list. Based on the value in the **Type** column, you can see which assignments have been created. For assignments to user groups, the **User Group** value is stored in the **Type** column. The corresponding user group is stored in the **Code** column.

## Assign Cue for a Specific User

This section describes how to assign cues for a specific user.  
To assign cues for a specific user, do the following:

- 1. From the Role Center, open the search function (**ALT+Q**).

2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **Cue Assignment** in the menu bar.
5. The **Cue Assignment** page is displayed.
6. To assign one or more cues to a specific user, click **Assign for User** in the menu bar.
7. The **Filter Page** window is displayed.

Filter Page

Filter: Cue

×

Code

.....

▼

+ Filter...

Filter: User

×

User Name

.....

+ Filter...

OK

Cancel

8. Under the **Filter: Cue** tab, enter the code of the cue you want to set up for the specific user in the Role Center in the **Code** input field. If you want to display all cues for the specific user in the Role Center, you can also specify an asterisk (\*) in the **Code** input field.
9. Under the **Filter: User** tab, enter the user's code in the **Code** input field.
10. To confirm the selection and complete the assignment, click **OK**.

One or more lines are added to the **Cue Assignment** list. Based on the value in the **Type** column, you can see which assignments have been created. For user-specific assignments, the **User** value is stored in the **Type** column. The corresponding user is stored in the **Code** column.



# Add Translations


This chapter describes how to add translations for Beyond Cues. The translations are used to display your configured cues, their display groups and actions in a different language.

You can add translations for the following elements of Beyond Cues:

- [Cues](#)
- [Display Groups](#)
- [Actions](#)
- [Filter Values](#)

## Add Translation for a Cue

This section describes how to add a translation for a cue.


 NOTE



**Permissions required**

It is only possible for certain users to add a translation for a cue. You must have the **BYD CU ADMIN** or **SUPER** permission set. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).



To add a translation for a cue, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Beyond Cues** and click on the appropriate search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Select the cue from the list for which you want to add a translation.
5. In the menu bar, click **Translations**.
6. The **Translations** page is displayed.

 Translations

Manage

	Language Code ↑	Title
→	<div></div>	

7. In the **Language Code** column, select the display language in which you want to add a translation for the cue title.
8. In the **Title** column, enter the translation for the cue in the selected display language.

You have stored a translation for a cue. When a user switches to the corresponding display language in their client, the title of the cue with the translation you added is displayed in the Role Center.

## Add Translation for a Display Group

This section describes how to add a translation for a display group.  
A display group is the tab in the Role Center under which the cue are displayed.

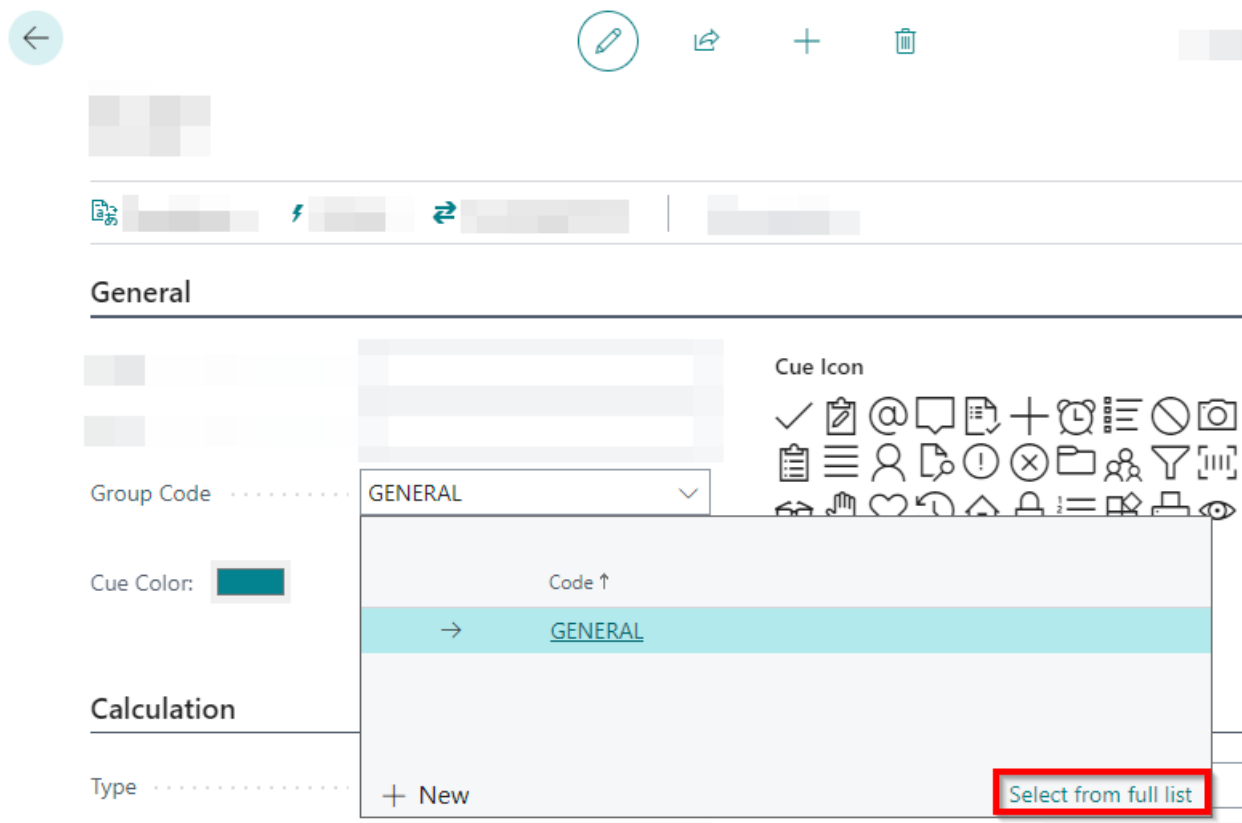
## NOTE

### Permissions required

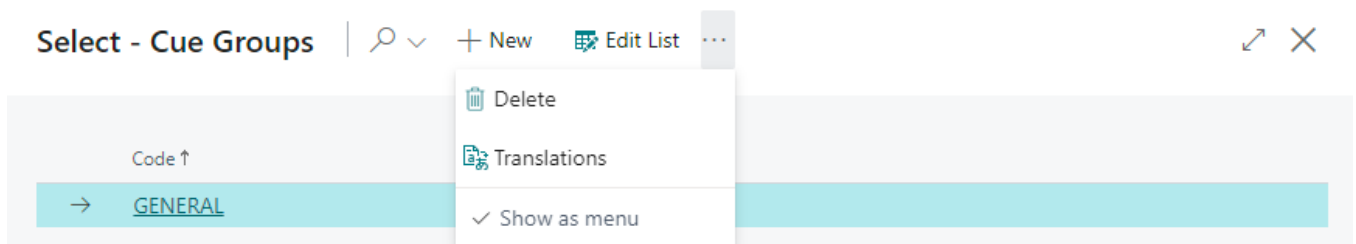
It is only possible for certain users to add a translation for a cue. You must have the **BYD CU ADMIN** or **SUPER** permission set. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To add a translation for a display group, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Beyond Cues** and click on the appropriate search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Select any cue from the list and open the cue card.
5. Under the **General** tab, in the **Group Code** field, open the drop-down menu.
6. Select the **Select from full list** option.



7. The **Select - Cue Groups** window is displayed.
8. Select the display group for which you want to add a translation.
9. Click the ellipsis (...) in the menu bar to display more options.
10. Click on **Translations**.



11. The **Translations** page is displayed.

←

Translations

↗

↗

Manage

↗

⌵

	Language Code ↑	Title
→	<div> <div></div> <div></div> </div>	

- In the **Language code** column, select the display language in which you want to add a translation for the display group.
- In the **Title** column, enter the translation for the display group in the selected display language.

You have added a translation for a display group. The display group in the Role Center is displayed with your translation when switching to the specified client display language.

## Add Translation for an Action

This section describes how to add a translation for an action.  
 An action is an option that becomes selectable when you click on the cue.

NOTE

**Permissions required**

It is only possible for certain users to add a translation for a cue. You must have the **BYD CU ADMIN** or **SUPER** permission set. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To add a translation for an action, proceed as follows:

- From the role center, open the search function (**ALT+Q**).
- Search for **Beyond Cues** and click on the appropriate search result.
- The **Beyond Cues** page is displayed. On this page you will find all configured cues.
- Select the cue from the list whose action(s) you want to translate.
- Open the cue card.
- Click **Actions** in the menu bar.
- The **Cue Actions** page opens.

←

Cue Actions

✓ Saved

↗

↗

🔍 Search

+ New

⚙ Edit List

🗑 Delete

🌐 Translations

More options

↗

⌵

☰

Cue Icon

✓

✍

@

💬

📄

+

🕒

☰

🚫

📷

📋

☰

👤

📎

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⌵

📊

🕶

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📦

🖨

👁

🔧

🔍

⚙

🔄

	Title	Type	Id	Parameters
→	Example Link	⋮ Hyperlink		www.example.com

- Select the action for which you want to add a translation.
- Click **Translations** in the menu bar.

10. The **Translations** page is displayed.

The screenshot shows the top part of a web application. At the top left is a back arrow icon and the text 'Translations'. To the right are icons for a window and a link. Below this is a 'Manage' section with a share icon and a filter icon. The main part of the image is a table with two columns: 'Language Code ↑' and 'Title'. The first row of the table has a right arrow icon in the first column, a dropdown menu in the second column, and a light blue background in the third column.

11. In the **Language code** column, select the display language in which you want to store a translation for the action.
12. In the **Title** column, enter the translation for the action in the selected display language.

You have added a translation for an action. The action of the cue is displayed in the Role Center with your translation when switching to the specified client display language.

## Add Translation for Filter Value

This section describes how to add a translation for a filter value. The translations for filter values are required for the function of the cue to work when you switch the display language in the graphical user interface.

To add a translation for a filter value, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. You will find all configured cues on this page.
4. Select the cue for which you want to add a translation to the filter value and open the cue card.
5. On the cue card under the **Calculation** area, click in the **Table Filter Code** field and open the drop-down menu.
6. Select the table filter code from the list and open the table filter card.

The screenshot shows a 'Table Filter' card. At the top, there's a back arrow, the title 'Table Filter', and icons for edit, share, add, and delete. To the right is a 'Saved' status and window/link icons. The main title is '36 · VK-ANG-4T'. Below it is a 'General' section with a table of fields. The table has four columns: 'Field No.', 'Field Name', 'Field Type', and 'Field Filter'. The first row is highlighted with a blue background. Below the table is a 'Fields' section with a menu bar containing 'New Line', 'Delete Line', and 'Translations'. The 'Translations' button is highlighted. Below the menu bar is a table with the same four columns as the one above.

Field No. ↑	Field Name	Field Type	Field Filter
→ 1	Document Type	Option	Angebot
99	Document Date	Date	<h-4T
120	Status	Option	Offen

7. To add a translation to a field filter, select the corresponding line with the field filter in the **Fields** area and click on **Translations** in the menu bar above. The function is illustrated below using the **Document Type** line as an example.
8. In the **Field Filter Translations** window, enter the translation(s) for the field filter. In our example, the required translations for the display language **English** (ENU) would be as follows:

**Sprachcode:** ENU

**Feldfilter:** Quote

You have added a translation for one or more field filters.

# Setup Department

This chapter describes how to create a department in **Beyond Cues**. The departments are display groups to which you can assign users. You can assign your created cues to a department (display group) in order to control which cues are displayed to which users.

The contents of this chapter are divided into the following sections:

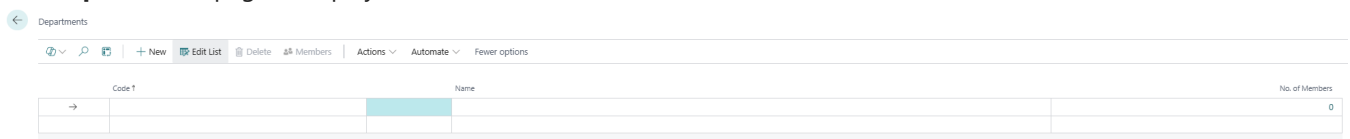
- [Create Department](#)
- [Add User to Department](#)
- [Assign Department to a Cue](#)
- [Export Department](#)
- [Import Department](#)
- [Copy Department](#)

## Create Department

This section describes how to create a department.

To create a department, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond Cues**.
2. The **Beyond Cues** page is displayed.
3. Select the **Departments** option in the menu bar.
4. The **Departments** page is displayed.



5. To create a new department, click on the **New** option.
6. Enter a code for the department under the **Code** column.
7. Enter a name for the department under the **Name** column.

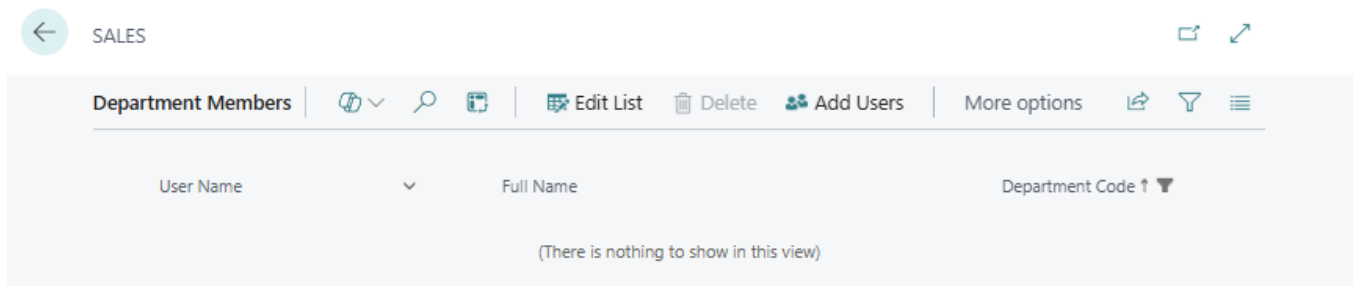
You have created a department.

## Add User to Department

This section describes how to add a user to a department.

To add a user to a department, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond Cues**.
2. The **Beyond Cues** page is displayed.
3. Select the **Departments** option in the menu bar.
4. The **Departments** page is displayed.
5. Click on the **Members** option in the menu bar.
6. Click on the **Add Users** option in the menu bar. If this option is not displayed, you must expand the displayed options in the menu bar using the ellipsis button (...).



7. The **User Lookup** window is displayed.
8. Select one or more users that you would like to add to the department.
9. To transfer the users to the department, click on **OK**.


You have added one or more users to the department.

## Assign Department to a Cue

This section describes how to assign a department to a cue.

To assign a department to a cue, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond Cues**.
2. The **Beyond Cues** page is displayed.
3. Click on the **Cue Assignment** option in the menu bar.
4. The **Cue Assignment** page is displayed.
5. Click on the **Assign for Department** option in the menu bar.
6. The **Filter Page** window is displayed.

**Filter Page** 

---

**Filter: Cue**

---

× Code .....

+ Filter...

---

**Filter: Department**

---

× Code .....

+ Filter...

---

7. Under the **Filter: Cue** area, enter the code of the cue for which you want to assign a department.
8. Under the **Filter: Department** section, enter the code of the department you want to assign to the cue.
9. To save the assignment of cue and department, click **OK**.

You have assigned the department to a cue.

## Export Department

This section describes how to export a department.

To export a department, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond Cues**.
2. The **Beyond Cues** page is displayed.
3. Click on the **Departments** option in the menu bar.
4. The **Departments** page is displayed.
5. Click on **Actions** > **Export Departments** in the menu bar.
6. An XML file is downloaded.

```
1 <?xml version="1.0" encoding="UTF-16" standalone="no"?>
2 <UserGroups>
3   <Department>
4     <Code>SALES</Code>
5     <Name>Sales</Name>
6     <DepartmentMember>
7       <UserGroupCode>Sales</UserGroupCode>
8       <UserSecurityId>{ dd9005cb-bad2-48a1-b96a-96955533250c }</UserSecurityId>
9     </DepartmentMember>
10    <DepartmentMember>
11      <UserGroupCode>Sales</UserGroupCode>
12      <UserSecurityId>{ 8ec4ead6-77d0-46a2-8dc7-8d2803a36843 }</UserSecurityId>
13    </DepartmentMember>
14  </Department>
15 </UserGroups>
```

You can use the XML file to import departments and the users assigned to them.

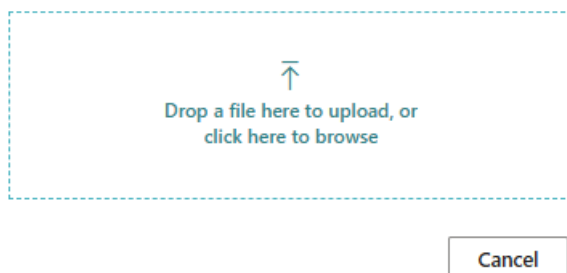
## Import Department

This section describes how you can import a department in another company.

To import a department, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond Cues**.
2. The **Beyond Cues** page is displayed.
3. Click on the **Departments** option in the menu bar.
4. The **Departments** page is displayed.
5. Click on **Actions** > **Import Departments** in the menu bar.
6. The **Import** window is displayed.

### Import



7. Upload the XML file.

After uploading the XML file, a dialog box is displayed showing how many departments with the number of department members have been imported.



# Copy Department

This section describes how you can copy a department.

To copy a department, proceed as follows:

- 1. Open the search field (ALT+Q) and search for the page **Beyond Cues**.
- 2. The **Beyond Cues** page is displayed.
- 3. Click on the **Departments** option in the menu bar.
- 4. The **Departments** page is displayed.
- 5. Click on **Actions > Copy department...** in the menu bar.
- 6. The **Copy department** dialog box is displayed.

Copy Department

Options

New Department Code

Copy Members

OK

Cancel


- 7. Enter the code for the new department in the **New Department Code** input field.
- 8. Activate the **Copy Members** slider if you want to copy the members.
- 9. Click **OK** to copy the department.

You have copied the department.

# Cue with Compare Feature

This chapter describes an use case for **Beyond Cues**.  
The aim of this use case example is for you to create a cue, with which you can compare two field values of a common table. In the following example, a cue is created with which you can compare the unit cost with the unit price for all items and display the number of items in the cue.

If you have a different case that you cannot map yourself, please contact us. You can find our contact details in the section [About BEYOND Cues](#).








 NOTE

**Permissions required**

It is only possible for certain users to create a cue. You must have the **BYD CU ADMIN** or **SUPER** permission set. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To create a cue that uses the **Compare** calculation type, proceed as follows:

1. From the Role Center, open the search (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **New** in the menu bar.
5. The **Cue** card is displayed.



## Cue

Translations

Actions

Cue Assignment

More options

General

Code

Title

Group Code

Sorting No.

Update Interval

0

Cue Color

Reset Color

Cue Icon

✓

✂

@

💬

📄

+

🕒

📋

🔗

🚫

📷

📋

☰

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🏠

🔒

☰

📦

🖨

👁

🔑

🔍

⚙

🔄

Calculation

Show less

Type

Average

Descending

Header Table Name

-

Field Name

Header Table Filter C...

Table Filter Code

Table Name

-

Header Table Links

0

Table Key

0

Page Name

-

6. Under the **General** tab, enter a code for the cue in the **Code** input field. After entering, a preview of the stack is displayed in the lower right area.
7. Enter a title for the cue in the **Title** input field. The preview is updated and shows how the configured cue will later be

displayed in the role center. The title can be translated for different display languages. For more information, see the section [Add translation for Cue](#).

8. Under **Group Code**, select a display group or create a new group. Note that the display group is displayed as a tab on the role center and divides one or more cues. You can define a translation for the group via the menu bar so that the translation for the display group is used when the display language of the interface is changed. Further information on this can be found in the chapter [Add Translation for a Display Group](#).
9. Enter a value in the **Sorting No.** field to define the order of cues within the selected group. You can also define a sorting order at group level.
10. Under the **Update Interval** field, enter a time interval in minutes that is used to update the cue.
11. Under **Cue Color**, specify the color for the cue.
12. Select a suitable icon for your cue from the available icons.
13. Under the **Calculation** tab, in the **Type** field, select **Compare** aus.
14. In the **Table Name** field, select **ID 27 - Item**.
15. In the **Field Name** field, select **22 - Unit Cost** aus.
16. In the **Condition** field, select **>**.
17. In the **Field Name** field, select **18 - Unit Pirce** aus.

Cue

✓ Saved

# ITEM COMPARE

Translations

Actions

Cue Assignment

Automate

Fewer options

Calculation

Show less

Type

Compare

Field Name

Unit Cost

Header Table Name

-

Condition

>

Header Table Filter C...

Field Name 2

Unit Price

Table Name

Item

Table Filter Code

Table Key

0

Header Table Links

0

Descending

☐

Page Name

Items

Indicators

New Line

Delete Line

Condition

Value

→ >

Color:

General

Item Compare

27


...

The cue shows you the items for which the unit cost is higher than the unit price.

# Cue with Function Feature

This chapter describes an use case example for **Beyond Cues**.

The aim of this use case example is for you to create a cue that uses a separate function. This function can either be created by yourself, a third-party provider or ideally by BeyondIT GmbH. To explain the functionality of the **Function** calculation type in the cue in more detail, a cue is created below that shows you the next birthday of an employee. This function is included in the standard scope of **Beyond Cues**.








 NOTE

Permissions required

It is only possible for certain users to create a cue. You must have the **BYD CU ADMIN** or **SUPER** permission set. For more information on how to assign the **BYD CU ADMIN** permission set to a user, refer to the section [Assign admin permissions for Beyond Cues](#).

To create a cue that uses the **Function** calculation type (here **Employee birthdays**), proceed as follows:

1. From the Role Center, open the search (**ALT+Q**).
2. Search for **Beyond Cues** and click on the corresponding search result.
3. The **Beyond Cues** page is displayed. On this page you will find all configured cues.
4. Click **New** in the menu bar.
5. The **Cue** card is displayed.



Cue

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More options

General

Code

Title

Group Code

Sorting No.

Update Interval

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Cue Color

Reset Color

Cue Icon

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Calculation

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Header Table Filter C...

Table Name

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Table Key

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Descending

Field Name

Table Filter Code

Header Table Links

0

Page Name

—

6. Under the **General** tab, enter a code for the cue in the **Code** input field. After entering, a preview of the stack is displayed in the lower right area.
7. Enter a title for the cue in the **Title** input field. The preview is updated and shows how the configured cue will later be displayed in the role center. The title can be translated for different display languages. For more information, see the

section [Add translation for Cue](#).

- Under **Group Code**, select a display group or create a new group. Note that the display group is displayed as a tab on the role center and divides one or more cues. You can define a translation for the group via the menu bar so that the translation for the display group is used when the display language of the interface is changed. Further information on this can be found in the chapter [Add Translation for a Display Group](#).
- Enter a value in the **Sorting No.** field to define the order of cues within the selected group. You can also define a sorting order at group level.
- Under the **Update Interval** field, enter a time interval in minutes that is used to update the cue.
- Under **Cue Color**, specify the color for the cue.
- Select a suitable icon for your cue from the available icons.
- Under the **Calculation** tab, in the **Type** field, select **Function** aus.
- In the **Function Name** field, select **Employee Birthdays**.

Cue

# BIRTHDAYS

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⚡ Actions

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Automate ▾

Fewer options

Calculation

Show less

Type

Function

Descending

Function Name

Employee Birthdays

Field Name

Header Table Name

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Table Filter Code

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Table Name

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Page Name

Table Key

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Indicators

New Line

Delete Line

Condition

Value

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Color:

General ▾

Birthdays

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The cue shows you the birthdays of your employees. At the bottom right you can see the number of employees and can even scroll between the dates displayed on the cue when you click on the totaling number.