Infor EAM Requestor User’s Guide

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Introduction

Requestor allows companies to easily increase the number of users submitting work requests and purchase requisitions without significantly increasing their financial investment. With Requestor, companies can authorize employees to enter and view the status of work requests and purchase requisitions over the Web. Requestor effectively extends basic Infor EAM functionality from room-to-room or site-to-site and lowers the total cost of ownership.

Important: Refer to the *Infor EAM Installation Guide* for more information about installing Requestor.

System Overview

Requestor is sold only as a supplemental set of seats in conjunction with the purchase of Infor EAM. Requestor allows you to do the following:

- Log in via Infor EAM accounts and security
- View the status of work requests and purchase requisitions
- Enter work requests and purchase requisitions

In Requestor, you can create, modify, view, and submit work requests and purchase requisitions, but you cannot approve work requests or purchase requisitions. You can only approve work requests and purchase requisitions in Infor EAM.

User’s Guide Overview

This section provides an overview of the chapters included in this guide.

Basics

Consult *Chapter 2 ▪ Basics* for basic information regarding Requestor and procedures for operating Requestor. This chapter details general functions of the software such as logging in and exporting files. In addition, this chapter provides descriptions of the user interface, including information about the toolbars and forms.

Work Requests

Consult *Chapter 3 ▪ Work Requests* for information regarding creating, viewing, and modifying work requests. You cannot approve or reject work requests in Requestor.

Purchase Requisitions

Consult *Chapter 4 ▪ Purchase Requisitions* for information regarding creating, viewing, and modifying purchase requisitions. This chapter also provides information regarding adding parts to requisitions and executing an advanced part search. You cannot approve or reject purchase requisitions in Requestor.

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Basics

This chapter describes Requestor features and outlines the procedures for basic operation.

Starting Requestor

Requestor is a Web-architected, Internet-based application. Requestor can only be accessed through the Internet Explorer (version 6.0 or higher) browser. Additionally, your browser must be set up to allow cookies and enable JavaScript before accessing the login page.

Follow these steps to start Requestor.

1. Choose Start | Programs | Internet Explorer from the Windows taskbar. Windows opens the Internet Explorer browser window.
2. **Address**—Enter the Requestor URL provided by your system administrator. Internet Explorer displays the login page.
3. **User ID**—Enter your user ID.
4. **Password**—Enter your password.

Notes: You can change your password at any time. Refer to "Managing Your Account" later in this chapter.

Periodically, the system requires that you change your password.

5. Click **Log In**. The system displays the Start Center home page.

The system displays work requests and purchase requests assigned to you. To see the record details, double-click the selected record.

Notes: To log out and return to the login page, click **LOGOUT** on the header.

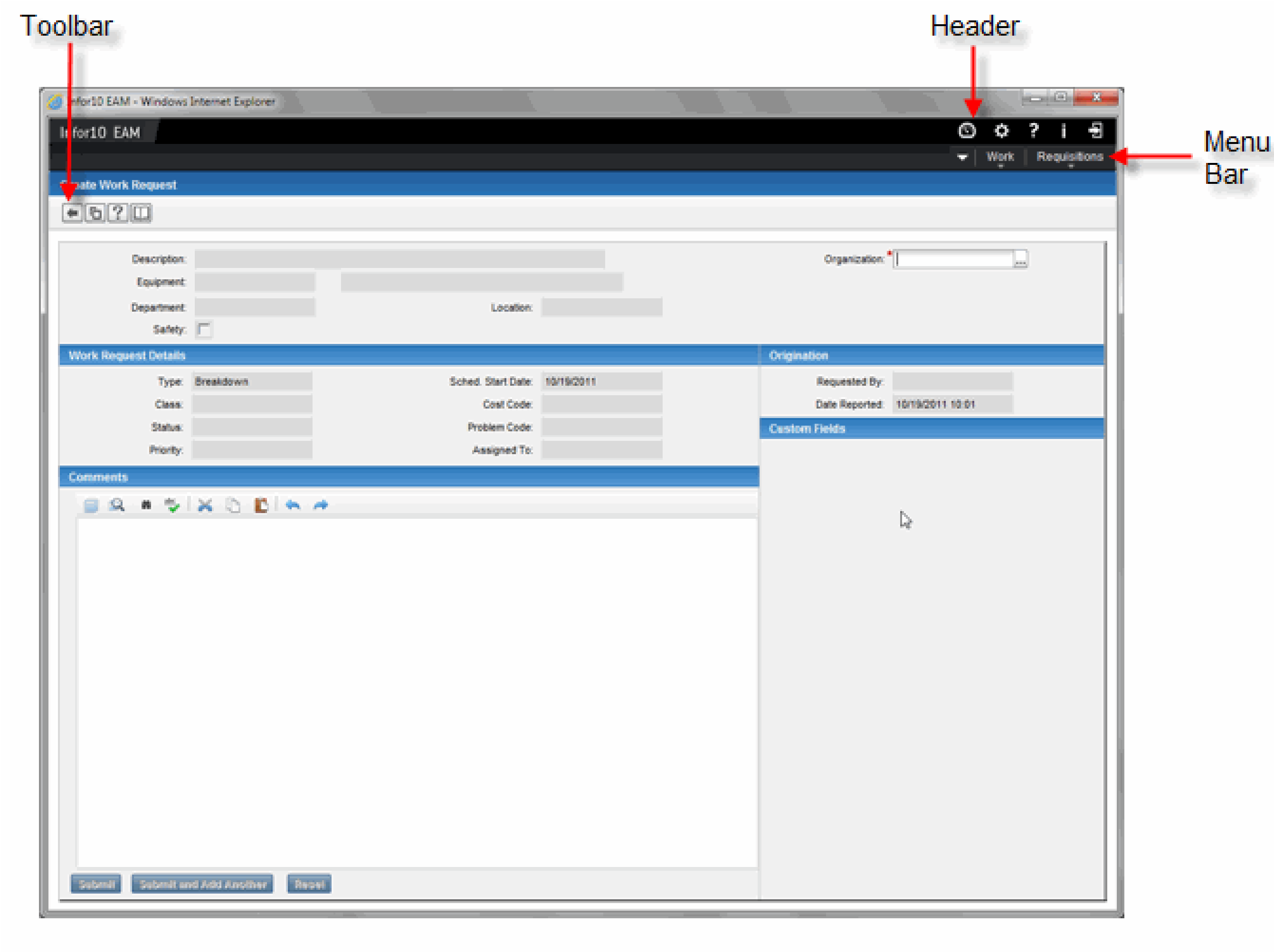
If you want to bookmark the login page as a shortcut link, you may provide the User ID in the URL http://YourServer/web/base/logindisp?userid=YourUserID. If your User ID contains a "+" symbol, then you must substitute "%2B" for the "+" symbol.

Refer to "Viewing the Start Center," "Understanding the Start Center Inbox," and "Understanding the Start Center KPIs" later in this chapter.

Navigation and User Interface

Requestor includes several navigation options that allow you to quickly and easily find the pages and information you need. Navigate through the system by clicking images, menus, buttons, tabs, and hyperlinks on each page.

Refer to the following sample screen, which details the user interface:

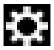


Header

Access basic functions on the header displayed on any page. Additionally, click on the navigation tabs to access the major functional areas or modules within the system.

Refer to the following descriptions when accessing options on the header:

Option	Function
	Displays the Start Center home page

Option	Function
	Displays the My Account page, which allows you to view and change your e-mail address, system language, login password, and success message information
	Displays help topics covering procedures
	Displays system application information, such as application name, version number, schema name, database name, database version, copyright information, and user ID
	Logs out of the system

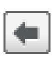
Menu Bar

The system displays functions and menus that apply to a tab or page on the menu bar. When you position your mouse over the navigation menus on the menu bar, the system displays a "drop-down" menu that lists the pages that apply to that navigation menu. Select an item from the drop-down menu to open the corresponding page.

Toolbar

Access basic system functions on the toolbar. All of the buttons are not available on all forms. Hover the cursor over a button to view a pop-up description of the button's function.

Refer to the following descriptions when accessing buttons on the toolbar:

Button	Function	Shortcut
	**Previous Screen**—Returns to the previous page	CTRL+Left Arrow
	**Help**—Displays online help for the current page	ALT+H

Message Bar

The system uses the message bar at the bottom of the window to quickly display messages, errors, and options you must view or select after performing an action. The message bar can include any of the following message types:

- **Error**—Indicates an error (e.g., a requisition must contain line items or the record has been modified by another user)
- **Warning**—Warns the user of an impending action (e.g., password expiration or overwriting an existing record)
- **Question**—Requires the user to select an option before taking an action (e.g., enter a reason for rejection prior to rejecting a requisition or work request)
- **Success**—Indicates the action was successfully completed (e.g., clicking **Submit** successfully created a requisition)
- **Information**—Displays informational text that is not the result of a user's action (e.g., a system message)

System Keyboard Shortcuts

Keyboard shortcuts are keys or key combinations for system functions. The following keyboard shortcuts allow easy access to header system functions.

Shortcut	Function
CTRL+T	MY ACCOUNT
ALT+H	HELP
CTRL+B	ABOUT
CTRL+Q	LOGOUT

Right-Click Options

The system includes two types of right-click menu options: system-level and screen-level. Right-click menu options are available when inserting or updating records.

Screen-level Options

Screen-level options are displayed at the top of the right-click menu. The screen-level options change based on which screen is being accessed. A right-click menu option is displayed for each button that appears on the screen.

System-level Options

System-level options are displayed at the bottom of the right-click menu. System-level options are common functions that are available on all screens, such as audit trail.

Fields

A ***field*** is a single topic of information in a record. ***Required fields*** (noted by a shaded color) must be completed for a record to be valid.

Hidden Fields

The system only displays certain fields by default upon delivery. The screen shots (pictures depicting forms and pages within the system) contained in the user documentation display forms and pages as they are upon delivery. However, the user documentation includes steps and procedures for all fields, even if they are hidden upon delivery. Your system administrator has the rights to hide and unhide fields as necessary.

Entering Information into Fields

There are many types of fields. Refer to the following table when entering information into fields:

Field Type	Entering Information and Examples
Text box	Enter information directly into the field.
Drop-down list	Click , and then select the value from the displayed list. **Note:** Begin typing in the field to quickly narrow the list of selections.

Field Type	Entering Information and Examples
Lookup	Enter the value or click , and then select the value from the lookup page. **Note:** If the field calling the lookup has two levels, then you can select a top-level record and then view and select the second-level record. When you select the second-level record, the system returns both values.
Note	Enter text directly into the note field. Use the scroll bar to scroll through a note that extends beyond the provided area.
Radio button	Select one of the values.
Check box	Select to activate/deactivate the option.

Entering Dates and Times into Fields

The system automatically enters the current date and time in some date fields; however, you can manually enter or edit dates and times using keyboard shortcuts, or you can use the calendar to select a date as necessary.

Entering Dates with the Calendar

Follow these steps to enter dates with the calendar.

1 Click next to the date field. The system displays a calendar popup.

Shortcut: Press F9 while your cursor is positioned in the date field to display the calendar.

2 Select the month and year from the drop-down lists on the top of the calendar.

Shortcuts: Click the hyperlink next to the month or year drop-down lists to select the month or year previous to the displayed value.

Click the hyperlink next to the month or year drop-down lists to select the month or year following the displayed value.

3 Click the desired date. The system closes the popup and displays the selected date in the field.

Entering Dates and Times with the Calendar

Follow these steps to enter dates and times with the calendar.

1 Click next to the date/time field. The system displays a calendar popup.

Shortcut: Press F9 while your cursor is positioned in the date field to display the calendar.

2 Select the month and year from the drop-down lists on the top of the calendar.

Shortcuts: Click the hyperlink next to the month or year drop-down lists to select the month or year previous to the displayed value.

Click the hyperlink next to the month or year drop-down lists to select the month or year following the displayed value.

3 Click the desired date, and then enter the desired time for **Hour** and **Minute**.

4 Click **OK**. The system closes the popup and displays the selected date and time in the field.

Entering Dates with Keyboard Shortcuts

Follow these steps to enter dates with keyboard shortcuts.

1 Position the cursor in the date field.

2 Choose one of the following options as necessary:

- *Enter the current date*—Press SPACEBAR. The system displays the current date in the field.
- *Enter a specific date or partial date*—Press numeric keys to enter the desired date (e.g., 070103), and then press TAB to exit the field. The system evaluates the date and displays the closest match in the required format (e.g., Jul/01/2003).

Lists

The system often displays information in tabular format, such as list view pages or any lookup. Select a row in a list to view record details or select data from a list view. You can also quickly sort, filter, re-arrange or resize fields if the system defaults do not suit your needs.

Selecting Rows in a List

Select rows in a list to view the record associated with the row, to copy the row data from a lookup to fields on a page, or to specify records on which to perform an action.

Follow these steps to select rows in a list.

1 Open any page or lookup containing a list of records. The system displays the list of records.

2 Click anywhere in the row to select the row. The system highlights the row.

3 Choose one of the following options:

- *Perform an action on the selected row*—Click the button corresponding with the action.
- *If the row is in a portlet or list view, view the details of the record associated with the row*—Double-click the row. The system opens the record in the associated record view.
- *If the row is in a lookup list view, copy the row data to fields on the original page*—Double-click the row (or select the row, and then click **OK**). The system closes the lookup and displays the data in the corresponding fields on the page.

Defining Quick Filters on Forms

Filter a list of records on forms to display only those records that meet your specified criteria.

Follow these steps to define quick filters on forms.

Note: The system applies the filter in addition to any filter criteria specified in a Dataspy that is applied to the list. Refer to "Dataspy" later in this chapter.

1 Open any form containing a list of records. The system displays the filter above the list.

Note: On list views, the system displays the number of records that were located using the specified Dataspy on the filter bar. Refer to "Dataspy" later in this chapter.

2 **Filter**—Select the field on which to filter from the first drop-down list.

3 Select an operator from the second drop-down list. Refer to the following table for operator options:

Operator	Definition
Equals	Search for items with a value equal to the entered value.
Contains	Search for items with a description that contains the entered value.
Does not Contain	Search for items with a description that does not contain the entered value.
Starts With	Search for items with a description that begins with the entered value.
Ends With	Search for items with a description that ends with the entered value.
Is Empty	Search for items with a description that has no entered value.
Is Not Empty	Search for items with a description that has any entered value.
Does Not Equal	Search for items with a description that does not equal the entered value.
Less Than	Search for items with a value less than the entered value.
Greater Than	Search for items with a value greater than the entered value.
Less Than or Equals	Search for items with a value less than or equal to the entered value.
Greater Than or Equals	Search for items with a value greater than or equal to the entered value.
Selected	Search for items where the checkbox is selected. This applies to checkbox fields only.
Not Selected	Search for items where the checkbox is not selected. This applies to checkbox fields only.
Either Selected or Not Selected	Search for items where the checkbox is either selected or not selected. This applies to checkbox fields only.

4 Enter the value for which to filter in the third field.

Note: If the field on which you are filtering is displayed on a Record View page, the third field in the quick filter will display according to that field type: text box, drop-down list, lookup, checkbox, or calendar. Refer to "Fields" earlier in this chapter.

5 Click **Run**. The system displays the records matching the filter criteria.

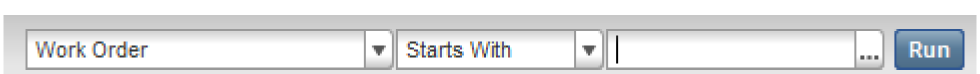
Defining Quick Filters on Lookups

Filter a list of records on lookups to display only those records that meet your specified criteria.

Follow these steps to define quick filters on lookups.

Note: The system applies the filter in addition to any filter criteria specified in a Dataspy that is applied to the list. Refer to "Dataspy" later in this chapter.

1 Open any lookup containing a list of records. The system displays the filter above the list.



2 **Filter**—Select the field on which to filter from the first drop-down list.

3 Select an operator from the second drop-down list. Refer to the following table for operator options:

Operator	Definition
Equals	Search for items with a value equal to the entered value.
Contains	Search for items with a description that contains the entered value.
Does not Contain	Search for items with a description that does not contain the entered value.
Starts With	Search for items with a description that begins with the entered value.
Ends With	Search for items with a description that ends with the entered value.
Is Empty	Search for items with a description that has no entered value.
Is Not Empty	Search for items with a description that has any entered value.
Less Than	Search for items with a value less than the entered value.
Greater Than	Search for items with a value greater than the entered value.
Less Than or Equals	Search for items with a value less than or equal to the entered value.
Greater Than or Equals	Search for items with a value greater than or equal to the entered value.
Selected	Search for items where the checkbox is selected. This applies to checkbox fields only.
Not Selected	Search for items where the checkbox is not selected. This applies to checkbox fields only.
Either Selected or Not Selected	Search for items where the checkbox is either selected or not selected. This applies to checkbox fields only.
Does Not Equal	Search for items with a description that does not equal the entered value.

4 Enter the value for which to filter in the third field.

Note: If the field on which you are filtering is displayed on a Record View page, the third field in the quick filter will display according to that field type: text box, drop-down list, lookup, checkbox, or calendar. Refer to "Fields" earlier in this chapter.

5 Click Add Line to add additional lines to the filter.

6 Click the **AND/OR** hyperlink to select one of the following join operators:

- *Include records that include all joined conditions*—Select **AND**.
- *Include records that contain one or the other condition*—Select **OR**.

7 Click (or) to add a parenthesis to the highlighted row. These parentheses are used when running a query to group statements together when mixing AND and OR statements.

8 Enter additional conditions by which to filter as necessary.

9 Click **Run**. The system displays the records matching the filter criteria.

Sorting Lists

Sort a list of records by any column in the list in ascending or descending order.

Follow these steps to sort lists.

1 Open any page or lookup containing a list of records. The system displays the list of records.

2 Choose one of the following options:

- *Sort the records in ascending (A-Z) order*—Double-click the column header of the column by which to sort the list. The system displays ▲ on the header. The system refreshes the table with the records sorted in the specified order.
- *Sort the records in descending (Z-A) order*—Double-click the column header of the column by which to sort the list, and then double-click the column header again. The system displays ▼ on the header. The system refreshes the table with the records sorted in the specified order.

Arranging Columns in a List

Arrange the order in which columns in a list are displayed.

Follow these steps to arrange columns in a list.

1 Open any page or lookup containing a list of records. The system displays the list of records.

2 Click and hold the column header of the column to move.

3 Holding the mouse button down, drag the header on top of the column header next to which you want the column to appear until the target column header is highlighted.

Note: If the column header is dragged from left to right, the system places the column header **after** the target column. If the column header is dragged from right to left, the system places the column header **before** the target column.

4 Release the mouse button. The system arranges the column in the specified order.

Note: To save the order and sizes of the columns, click in the upper-right part of the list view, and then select **Save Grid Layout**.

Resizing Columns in a List

Specify the widths of columns in a list.

Follow these steps to resize columns in a list.

1 Open any page or lookup containing a list of records. The system displays the list of records.

2 Position your mouse over the right-hand border of the column to resize. The system displays ⟷ as the mouse icon.

3 Click and hold the column border, and then drag the border in the desired direction to increase or decrease the width of the column.

4 Release the mouse button. The system resizes the column.

Note: To save the order and sizes of the columns, click in the upper-right part of the list view, and then select **Save Grid Layout**.

Saving the List Layout

After arranging the columns in the list view, save the layout to be used each time you return to that screen.

Follow these steps to save the list layout.

1 Open the form for which to save the layout.

2 Modify the page layout as necessary.

3 Click in the upper-right part of the list view, and then select **Save Grid Layout**. The system displays a message indicating that the layout was saved.

Note: The system saves the layout only if the Dataspy that you selected is created by the logged in user.

4 Click **OK**. The system closes the message bar.

Copying Records

Use the Copy Record toolbar button to copy information from one record to another record within the same form. Copying a record creates an editable copy of the record that contains the same base data. The Copy Record button is only available on forms that have List View and Record View pages, and it is only enabled on the List View and Record View pages.

Note: To copy a record, you must have insert rights for the organization of the record you are copying.

Follow these steps to copy records.

1 Open the form for which to copy records.

2 Select the record to copy, and then click . The system copies values from the previously selected record to the new record, including custom fields, and displays the form in insert mode.

Note: To maintain certain business and security rules, some displayed fields may not copy over to the new record. Verify all copied data before saving the record.

3 Modify the record as neccesary.

4 Click . The system saves the record.

Exporting Records

Export records from the system to a Microsoft Excel file to extract information from the database without making an external connection, e.g., from outside of the system, to the database. The file can be viewed using Microsoft Excel.

Follow these steps to export records.

1 Open the form from which to export records.

Important: The system will export the results of the last query performed, even if you are not currently viewing those records (e.g., if you cleared the form or if this exceeds the limit of what is displayed on the grid).

2 Click in the upper-right part of the list view, and then select **Save Grid To Excel**. The system opens a new browser window and displays the exported records in Excel format.

Note: The export to Excel function exports a maximum of 64,000 records.

3 Save the file as necessary.

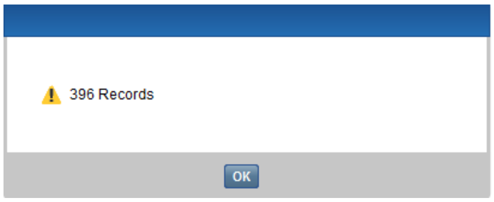
Displaying the Total Record Count

All list views have the ability to display the total record count, even if this count exceeds the current maximum number of records that can be displayed in the list view.

Follow these steps to display the total record count.

1 Open the form for which to display the total record count.

2 Click 123. The system displays a message indicating the total number of records.



3 Click **OK**. The system closes the message bar.

Dataspy

A Dataspy is a named, predefined view of a list of records or set of data that can be used on any page, lookup, or data area that contains that same list of records. For example, a Dataspy that is created to apply to a list of requisitions can also be applied to a portlet containing that same list of requisitions.

A Dataspy consists of the following four basic components:

- **Filter**—Contains the conditional statements that make up a filter. For example, a Dataspy might filter for all requisitions that have a **Status** "equal to" Ready for Printing, and a **Creation Date** "greater than" last Friday.
- **Sort**—Specifies the order in which the records should be sorted. For example, a Dataspy might sort the requisitions so that the most recently created requisitions are displayed at the top of the list in descending order.
- **Layout**—Specifies the fields that are displayed in the list and the order in which those fields should be displayed. For example, a Dataspy might specify that the **Requisition Description** column is displayed to the left of the **Requisition Number** column and that the **Storeroom** field is not displayed in the list.
- **Advanced**—Specifies an additional Where clause used for filtering data. The Where clause is appended to the Where clause generated by the Dataspy Filter.

Note: You can also specify column order by arranging the columns in a list view. Refer to "Arranging Columns in a List" earlier in this chapter.

Editing an Existing Dataspy

Edit the values in an existing Dataspy.

Note: The system automatically includes a number of predefined public Dataspies. Only a system administrator can modify the public Dataspies.

Follow these steps to edit an existing Dataspy.

1 Open the Dataspy editor by selecting, on any list view page, the Dataspy to edit from the drop-down list on the filter bar, and then clicking **Edit**. The system displays the selected Dataspy in the Dataspy editor.

Note: You can select a different Dataspy name from the drop-down list on the Dataspy editor header.

2 Edit the Dataspy criteria as necessary. Refer to "Specifying Dataspy Criteria" later in this chapter.

Notes: Click **Run** to apply the Dataspy to the list without saving changes.

Select **Default Dataspy** to save this Dataspy as the default.

3 Click **Save**. The system saves the changes to the Dataspy and closes the Dataspy editor. The system applies the Dataspy to the list view from which the Dataspy editor was launched.

Note: You can only edit and save Dataspies that you created. If you edit a system-delivered Dataspy, the system goes into Copy mode.

Creating and Saving a New Dataspy

Follow these steps to create and save a new Dataspy.

1 Open an existing Dataspy from a list view, and then click **New**. Refer to "Editing an Existing Dataspy" above. The system opens the Dataspy editor and displays a text box containing "(New)" in the header.

2 Enter a title for the Dataspy in the text box.

3 Edit the Dataspy criteria as necessary. Refer to "Specifying Dataspy Criteria" later in this chapter.

Notes: If the Dataspy was launched from a list view, click **Run** to apply the Dataspy to the list without saving changes.

Click **Cancel New** to cancel the creation of a new Dataspy and return to the previous view.

Select **Default Dataspy** to save this Dataspy as the default.

4 Click **Save**. The system saves the changes to the Dataspy and closes the Dataspy editor. The system applies the Dataspy to the list view from which the Dataspy editor was launched.

Creating a Copy of an Existing Dataspy

Copy the values from an existing Dataspy into a new Dataspy and edit the criteria as necessary.

Follow these steps to create a copy of an existing Dataspy.

1 Open the Dataspy editor by selecting, on any list view page, the Dataspy to edit from the drop-down list on the filter bar, and then clicking **Edit**. The system displays the selected Dataspy in the Dataspy editor.

2 Click **Copy**. The system displays a text box containing a modified title of the original Dataspy in the header.

3 Modify the title for the Dataspy in the text box as necessary.

4 Edit the Dataspy criteria as necessary. Refer to "Specifying Dataspy Criteria" later in this chapter.

Note: Click **Cancel Copy** to cancel the creation of a new Dataspy and return to the previous view.

Select **Default Dataspy** to save this Dataspy as the default.

5 Click **Save**. The system saves the changes to the Dataspy and closes the Dataspy editor. The system applies the Dataspy to the list view from which the Dataspy editor was launched.

Deleting a Saved Dataspy

Follow these steps to delete a saved Dataspy.

1 Open the Dataspy editor by selecting, on any list view page, the Dataspy to edit from the drop-down list on the filter bar, and then clicking **Edit**. The system displays the selected Dataspy in the Dataspy editor.

2 Click **Delete**. The system deletes the selected Dataspy.

Notes: You can only delete Dataspies that you created.

Specifying Dataspy Criteria

Specify the filter, sort, layout, and advanced criteria when creating, editing, or copying a Dataspy. When the Dataspy is applied to a list or portlet, the system displays only the records that match the specified filter criteria in the sort order and layout specified.

Specifying Dataspy Filter Criteria

Select the fields, conditions, and values upon which to filter a list of records.

Follow these steps to specify Dataspy filter criteria.

1. Open the Dataspy editor by selecting, on any list view page, the Dataspy to edit from the drop-down list on the filter bar, and then clicking **Edit**. The system displays the selected Dataspy in the Dataspy editor.
2. Click **Filter** from the left-hand column of the Dataspy editor. The system displays the Filter view in the Dataspy editor.
3. Select a field on which to filter from the first drop-down list.
4. Select an operator from the second drop-down list. Refer to the following table for operator options:

Operator	Definition
Equals	Search for items with a value equal to the entered value.
Contains	Search for items with a description that contains the value.
Does Not Contain	Search for items with a description that does not contain the entered value.
Starts With	Search for items with a description that begins with the value.
Ends With	Search for items with a description that ends with the value.
Is Empty	Search for items with a description that has no entered value.
Is Not Empty	Search for items with a description that has any entered value.
Does Not Equal	Search for items with a description that does not equal the entered value.

5. Enter a value for which to filter in the third field.

Note: Enter relative dates by specifying + or – with units in days. For example,"-1" is one day back, and last week would be >=-"-7".

6. Click the **AND/OR** hyperlink to select one of the following join operators:
   - *Include records that include all joined conditions*—Select **AND**.
   - *Include records that contain one or the other condition*—Select **OR**.
7. Click  or  to add parenthesis to the highlighted row. These parenthesis are used when running a query to group statements together when mixing AND and OR statements.
8. Enter additional conditions by which to filter as necessary.

Notes: Click **Add Line** to add additional lines to the filter.

To remove a filter line, choose the blank selection from the first drop-down list.

Specifying Dataspy Sort Criteria

Select the order in which to sort a list of records.

Follow these steps to specify Dataspy sort criteria.

1. Open the Dataspy editor by selecting, on any list view page, the Dataspy to edit from the drop-down list on the filter bar, and then clicking **Edit**. The system displays the selected Dataspy in the Dataspy editor.
2. Click **Sort** from the left-hand column of the Dataspy editor. The system displays the Sort view in the Dataspy editor.
3. **1st**—Select the first field by which to sort the records.
4. Click to select one of the following sort orders:
   - Sort records either alphabetically or numerically by the selected field (ascending)—Select .
   - Sort records in either reverse alphabetical or reverse numerical order by the selected field (descending)—Select .
5. Enter additional fields by which to sort as necessary.

Note: To remove sort criteria, choose the blank selection from the drop-down lists.

Specifying Dataspy Layout Criteria

Select the columns to display when the Dataspy is applied to a list of records, and then specify the order in which the fields will be displayed. Since a portlet can contain only three columns and a list view can contain any number of columns, the system requires that you specify one layout to be used when the Dataspy is applied to a list view and another to be used when the same Dataspy is applied to a portlet.

Additionally, the system allows you to specify the number of records that the system will retrieve before it retrieves another set of records from the database in a list view. This setting does not affect the height of a table (i.e., the number of rows that are shown without scrolling the table). This setting is important because it will affect the speed at which the system downloads and displays a list containing a large number of records.

For example, if the value is set at 100 (the default), the system will only download the first 100 records that match the criteria specified in the selected Dataspy. When you scroll to the end of the 100 records, the system will download and display the next 100 records that match the criteria specified in the Dataspy. If the value is set to 300, then the system will not display any of the records until it has downloaded all 300 records.

Follow these steps to specify Dataspy layout criteria.

1. Open the Dataspy editor by selecting, on any list view page, the Dataspy to edit from the drop-down list on the filter bar, and then clicking **Edit**. The system displays the selected Dataspy in the Dataspy editor.
2. Click **Layout** from the left-hand column of the Dataspy editor. The system displays the List View Layout view in the Dataspy editor.

   Available Fields lists all fields that are available but not visible in the list of records, while **Visible Fields** lists all fields displayed as columns in the list of records.
3. Refer to the following table when selecting or ordering fields:

Function	Procedure
Add a field	Select the field in **Available Fields**, and then click .
Remove a field	Select the field in **Visible Fields**, and then click .
Add all fields	Click .

Function	Procedure
Remove all fields	Click «.
Reorder fields	Select the field in **Visible Fields**, and then click either ▲ or ▼ to move the field up or down in the order.

4 **Number of data rows to retrieve—**Select the number of rows that the system will retrieve in the list view before it downloads another set of rows.

5 Select **Portlet**. The system displays the Portlet Layout view in the Dataspy editor.

Note: The Portlet radio button is only available for screens that support portlets.

6 Click the field to select, and then refer to the table above when selecting or ordering fields.

7 **Number of rows to display in the portlet—**Select the number of rows that the system will display in the portlet when the Dataspy is applied.

Specifying Dataspy Advanced Criteria

Follow these steps to specify Dataspy advanced criteria.

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**. The system displays the selected Dataspy in the Dataspy editor.

2 Click **Advanced** from the left-hand column of the Dataspy editor. The system displays the Advanced view in the Dataspy editor.

3 **Where Clause—**Enter an additional Where clause as necessary. The Where clause is appended to the Where clause generated by the Dataspy Filter. The Where clause will be appended with an "AND" statement if a Filter has been specified.

4 Click **Test Where Clause**. If the SQL Statement compiles without error, the system displays a confirmation message.

Note: Click **Display SQL Statement** to view the entire SQL statement. The SQL Statement field is read-only.

Viewing the Start Center

View inbox entries and KPIs on the Start Center page.

Follow these steps to view the Start Center.

1 Log in to Requestor. The system displays the Start Center page.

Note: To return to the start center from any other form, click **Start Center** on the header. The system displays the Start Center page.

2 View the Inbox and KPI sections.

Notes: The system automatically recalculates the values of inbox entries that have **Auto Refresh** activated when you open the Start Center page. Refer to "Adding Entries to the Start Center Inbox" later in this chapter. To manually refresh the inbox entries, click **Refresh**. The system recalculates the inbox entries and updates the inbox.

To refresh the KPI values, click **Refresh**. The system recalculates the KPI values and updates the KPIs.

Understanding the Start Center Inbox

The inbox displays pending actions or activities (inbox entries) for users on the Start Center page. You can call screens necessary to complete actions or activities associated with inbox entries directly from the inbox. Inbox entries can either be user-group specific or public and can be assigned to specific user groups or defined as public entries that are displayed for all users.

Access the inbox by invoking the Start Center, or the system administrator can set up the inbox to open automatically when you log in to the system. Configure the inbox to refresh completely or selectively every time it is accessed.

The system administrator associates SQL select statements with inbox entries. These statements define inbox entries that query the database for the appropriate instances of an entry to retrieve to your inbox.

You can also modify the inbox by adding and/or deleting entries. Finally, you can modify the order and sequence in which entries are displayed.

The system displays a description and value for each entry in the inbox. If a screen is selected for an entry during definition, the system administrator enters a Dataspy for the inbox entry to automatically query for and retrieve the records associated with an inbox entry to the called screen when it is invoked.

The Inbox includes three tabs and pages of information: Operations, Maintenance, and Management. You can modify the text that appears on the three Start Center Inbox tabs. Contact your system administrator for more information.

Setting Up the Start Center Inbox

Set up the Start Center Inbox to display inbox entries specific to your job. Specify the default inbox tab and modify the sequence in which inbox entries are displayed in the inbox. You can also delete inbox entries.

Specifying the Default Start Center Inbox Tab

The Start Center Inbox contains three tabs and pages of information: Operations, Maintenance, and Management. Specify which of the Start Center Inbox tabs you wish to display by default whenever you access the Start Center.

Follow these steps to specify the default Start Center Inbox tab.

1. Open the Start Center page.
2. Select the inbox tab for which to set as the default.
3. Right-click on the tab page, and then choose Set Inbox Tab as Default. The system sets the corresponding tab as the default displayed tab.

Adding Entries to the Start Center Inbox

Add entries to the Start Center Inbox to display entries that are specific to your job.

Follow these steps to add entries to the Start Center Inbox.

1. Open the Start Center page.
2. Click **Personalize**. The system displays the Personalize Your Inbox popup.
3. Click **Insert Inbox Entry**. The system inserts a new Inbox Entry Details record.
4. **Sequence Number**—Enter the sequence in which the inbox entry will be displayed in the inbox.
5. **Inbox Code**—Enter the inbox entry to add to the inbox.
6. **Tab**—Select the tab on which to place the inbox entry.

7 **Auto Refresh**—Select to enable the system to automatically refresh the inbox every time the Start Center is invoked.

Note: Automatic refresh causes slower performance when opening the Start Center page.

8 Click **Submit**. The system saves the record and updates the Inbox Entries list.

Note: To delete an inbox entry, select the inbox entry to delete, and then click **Delete Inbox Entry**. The system deletes the record and updates the Inbox Entries list.

9 Click **Close**. The system closes the Personalize Your Inbox popup and automatically refreshes the inbox.

Modifying the Sequence of Inbox Entries

Modify the sequence in which inbox entries are displayed in the inbox.

Follow these steps to modify the sequence of inbox entries.

1 Open the Start Center page.

2 Click **Personalize**. The system displays the Personalize Your Inbox popup.

3 Select the inbox entry for which to modify the display sequence, and then enter a new value for **Sequence Number**.

4 Click **Submit**. The system saves the record and updates the Inbox Entries list.

5 Click **Close**. The system closes the Personalize Your Inbox popup and automatically refreshes the inbox.

Accessing Screens from the Start Center Inbox

Access screens associated with inbox entries directly from the inbox.

Follow these steps to access screens from the Start Center Inbox.

1 Open the Start Center page.

2 Locate the inbox entry for which to access a screen, and then double-click the entry. The system displays the screen.

Note: The system automatically queries for and retrieves the records associated with the inbox entry to the displayed screen if you defined a Dataspy for the displayed screen when defining the inbox entry.

Understanding the Start Center KPIs

The Start Center displays key performance indicators (KPIs) and their scores. KPIs are user-defined parameters that measure productivity or efficiency. The system displays an icon and a score for each KPI on the Start Center. The Start Center enables you to view the status of your work environment with respect to the KPIs specific to your job, as well as your current score for each KPI. The scores for KPIs are calculated at regular intervals based on the KPI definition.

The system administrator defines and grants access to the KPIs. KPIs can either be user-group specific or public. Public KPIs can be displayed for all users. Access KPIs on the Start Center or have the system administrator set up the Start Center to open automatically when you log on to the system. Depending on system privileges, you can configure the Start Center to display KPIs based on your preferences.

Important: The system only supports .gif files for the images displayed for KPIs on the Start Center

Setting Up the Start Center KPIs

Set up the KPIs specific to your job. Modify the sequence in which KPIs are displayed in the inbox. You can also delete KPIs.

Adding KPIs to the Start Center

Add KPIs to the Start Center to display the KPIs that are specific to your job.

Follow these steps to add KPIs to the Start Center.

1 Open the Start Center page.

2 Click **Personalize**. The system displays the Personalize Your KPIs popup.

3 Click **Insert KPI Entry**. The system inserts a new KPI Entry Details record.

4 **Sequence Number**—Enter the sequence in which the KPI will be displayed in the Start Center.

5 **KPI Code**—Enter the KPI to add to the Start Center.

6 Click **Submit**. The system saves the record and updates the KPI Entries list.

Note: To delete a KPI entry, select the KPI entry to delete, and then click **Delete KPI Entry**. The system deletes the record and updates the KPI Entries list.

7 Click **Close**. The system closes the Personalize Your KPIs popup and automatically refreshes the KPIs.

Modifying the Sequence of KPIs

Modify the sequence in which KPIs are displayed on the Start Center.

Follow these steps to modify the sequence of KPIs.

1 Open the Start Center page.

2 Click **Personalize**. The system displays the Personalize Your KPIs popup.

3 Select the KPI for which to modify the display sequence, and then enter the new value for **Sequence Number**.

4 Click **Submit**. The system saves the record and updates the KPI Entries list.

5 Click **Close**. The system closes the Personalize Your KPIs popup and automatically refreshes the KPIs.

Accessing Screens from Start Center KPIs

Access screens associated with KPIs directly from the Start Center.

Follow these steps to access screens from Start Center KPIs.

1 Open the Start Center page.

2 Locate the KPI entry for which to access a screen, and then double-click the entry. The system displays the screen.

A ▼ in the KPI entry title indicates that the entry is a parent KPI. The arrow only appears when children have been added to the parent. The arrow does not automatically appear by selecting **Parent** during KPI setup.

To access the children KPIs, click ▼. The system refreshes the KPIs and displays all children KPIs. Double-click the child KPI for which to call a screen. The system calls the screen.

Note: The system automatically queries for and retrieves the records associated with the KPI entry to the displayed screen if you defined a Dataspy for the displayed screen when defining the KPI entry.

Managing Your Account

Change your e-mail address, system language, and/or login password as necessary.

Follow these steps to manage your account.

1 Click **MY ACCOUNT** on the header. The system displays the My Account page.

2 **Success Msg. Timeout**—Select the timeframe for which you want the message bar to display success messages.

3 **E-mail**—Enter a new e-mail address as necessary.

4 **Language**—Select the language to use for your account.

Note: If you modify **Success Msg. Timeout** you must log out and then log in to see the changes.

If you modify **Language** you must close all browsers and then log in to see the changes.

5 **Current Password**—Enter the password you used to log in.

6 **New Password**—Enter the new password.

7 **Confirm Password**—Re-enter the new password.

Note: If LDAP is enabled, the **Current Password**, **New Password**, and **Confirm Password** fields are not displayed.

8 Click . The system saves the record.

3

Work Requests

To handle a request for work, Requestor uses work requests. You can adapt work requests to accommodate work orders.

Creating Work Requests

Create work requests for equipment that needs repairs, and then supervisors or other authorized employees can either approve or reject them.

Note: Requestor users do not have access to functions involving Custom Fields.

Follow these steps to create work requests.

1. Open the Create Work Request form.
2. **Organization**—Enter the organization to which the work request belongs if you use multi-organization security.

Note: The system only displays **Organization** if multi-organization security (MOS) is activated.

3. **Description**—Enter a description of the work request.
4. **Equipment**—Enter an equipment number.

   The system automatically populates the equipment description, **Parent Location**, **Department**, and **Assigned To** if available.
5. **Department**—Enter the department.
6. **Safety**—Select if this work requires special safety precautions.
7. **Location**—Enter the parent location of the work to be done.
8. **Type**—Select the type of work request.
9. **Class**—Enter the class of the work request.
10. **Status**—Select the status of the work request. As a Requestor user, you can only select `Q`.
11. **Priority**—Select the priority of the work request.
12. **Sched. Start Date**—Enter the scheduled start date of the work request.
13. **Cost Code**—Enter the cost code for the work request.
14. **Problem Code**—Enter the code to identify the type of problem.
15. **Assigned To**—Enter the person responsible for the work.
16. **Comments**—Enter any additional comments regarding the work request.
17. **Requested By**—Enter the employee requesting the work.
18. **Date Reported**—Enter the date the work request was reported.
19. **Req. Start Date**—Enter the requested date to begin the work.
20. Click **Submit**. The system saves the record.

Notes: Click **Submit and Add Another** to create another request after the system submits the first request.

Click **Reset** to reset all values on the page to the last saved values.

Viewing and Modifying Work Requests

Review the status of work requests and/or modify work requests.

Follow these steps to view and modify work requests.

1 Open the View Work Requests form.

Notes: Apply a Dataspy or filter, and/or sort work requests as necessary. Refer to "Lists" and "Dataspy" in *Chapter 2 • Basics*.

2 Double-click the row containing the request to view or modify. The system displays the Work Request Details form.

3 View and modify work request details as necessary.

4 Click **Save Changes**. The system saves the record.

Notes: Click **Reset** to reset all values on the page to the last saved values.

System users cannot approve or reject work requests.

4

Purchase Requisitions

Create purchase requisitions to begin the purchasing process.

Creating Purchase Requisitions

Create a purchase requisition to request needed parts by specifying the requisition details and approval information on purchase requisitions headers, adding parts to the requisition, and then submitting the requisition to the appropriate personnel for approval.

Note: Requestor users do not have access to functions involving the Quotation Indicator, Store-to-Store requisitions, repairable spares requisitions, and requisitioning parts-as-assets.

Follow these steps to create purchase requisitions.

1. Open the Create Requisition form.
2. **Organization**—Enter the organization to which the requisition belongs if you use multi-organization security.

Note: The system only displays **Organization** if multi-organization security (MOS) is activated.

3. **Description**—Enter a description of the requisition.
4. **Status**—Select the requisition status. You can only select Unfinished.
5. **Store Room**—Enter the receiving store.
6. **Delivery Address**—Enter the address to where the part is delivered.
7. **Cost Code**—Enter the cost code.
8. **Supplier**—Enter the supplier of the part.
9. **Work Order-Activity**—Enter the work order and activity.

Notes: The system prompts you to select an activity if the selected work order contains multiple activities.

The system copies the work order and activity to all parts. Modify this information as necessary.

10. **Comments**—Enter any comments concerning the requisition.
11. **Requested By**—Enter the name of the person requesting the part.
12. **Preferred Approver**—Enter the preferred approver of the requisition.
13. Click **Submit**. The system saves the record and automatically populates **Requisition**.

Notes: Click **Add Part** to add a part to the requisition. Refer to "Adding Parts to Requisitions" later in this chapter for more information. **Requisition Total** cannot exceed your requisition limit.

To delete a part, select the row containing the part, and then click **Delete Part**. You must have delete rights for the requisition lines to delete parts.

Click **Reset** to reset all values on the page to the last saved values.

Adding Parts to Requisitions

After creating the requisition header, add parts to the requisition.

Search for an existing part via one of several criteria. The system displays any matches it finds or allows you to narrow your search. If you cannot find the part you need, create a new part.

Follow these steps to add parts to requisitions.

1. Open the Create Requisitions form.
2. Create a purchase requisition. Refer to "Creating Purchase Requisitions" earlier in this chapter.
3. Click **Add Part**. The system displays the Add Part(s) form.
4. **Search for a**—Select the desired search criteria.
5. Enter a value for **that contains**, and then click **Search**. The system searches for a part that matches the search criteria and returns one of the following results:

- *Requestor locates one matching part*—The system enters the **Part ID** and description and enters values into additional fields related to the located part if possible. Refer to the following table for fields completed according to search criteria:

Search criteria	Fields completed
Part ID	Part ID and description
Manufacturer Part ID	Part ID and description, Manufacturer, and Manufacturer Part ID
Supplier Part ID	Part ID and description, Supplier name, and Supplier Part ID
Part Description	Part ID and description
Global Part Code	Part ID and description; Manufacturer ID or Supplier ID

- *Requestor does not locate an exact match to the search criteria but does locate several parts that begin with the same criteria*—The system opens the Parts Lookup popup. If you see the part you need in the list, double-click the row containing the part to add to the requisition. The system enters the **Part ID** and description and enters values into additional fields related to the selected part if possible. To refine your search, execute an advanced part search.
- *Requestor does not locate any parts that match the search criteria*—Refine your search criteria in the search bar.

Note: If the system does not locate the part, create a new part by entering a description in the field adjacent to **Part ID**. The system assigns a part number after you submit the requisition.

6 **Qty Required**—Enter the number of parts to purchase, and then enter the unit of measure for the part.

7 **Price**—Enter the price per unit of the part. The system displays the currency with which to purchase the part.

8 **Line Total**—The system displays the total monetary value of the line(s) and the number of line(s).

9 **Comments**—Enter any additional comments regarding the purchase requisition.

10 **Requested Before**—Enter the date that the requisition is due.

11 **Delivery Address**—Enter the address to where the part is delivered.

12 **Buyer**—Enter the buyer of materials/services.

13 **Commodity**—Enter the commodity.

14 **Work Order-Activity**—Enter the work order and activity.

15 **Requisition**—The system displays the number assigned to the requisition.

Note: Click **Save and Add Another** to add additional parts to the requisition.

16 Click **Save** when you are finished adding parts. The system saves the record.

Notes: Click **Reset** to reset all values on the page to the last saved values.

Click **Back** to return to the previous page without saving changes to the current page.

Viewing and Modifying Requisitions

Review the status of requisitions and/or modify requisitions.

Follow these steps to view and modify requisitions.

1 Open the View Requisitions form.

Note: Apply a Dataspy or filter, and/or sort requisitions as necessary. Refer to "Lists" and "Dataspy" in *Chapter 2 ▪ Basics*.

2 Double-click the row containing the requisition to view or modify. The system displays the Requisition Details form.

3 View and modify requisition details as necessary.

4 Click **Submit**. The system saves record.

Notes: Click **Add Part** to add a part to the requisition. Refer to "Adding Parts to Requisitions" earlier in this chapter for more information. **Requisition Total** cannot exceed your requisition limit.

To delete a part, select the row containing the part, and then click **Delete Part**. Refer to "Selecting Rows in a List" in *Chapter 2 • Basics*. You must have delete rights for the requisition lines to delete parts.

Click **Reset** to reset all values on the page to the last saved values.