



Infor EAM System Administrator Guide

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About this guide

Objectives

This guide contains procedures for configuring Infor EAM system modules.

Intended audience

This guide is intended for system administrators, implementation consultants, product architects, and support specialists.

Organization of this guide

This table describes the chapters of this guide:

Chapter	Description
System configuration	Instructions on how to set up Infor EAM to manage physical assets and maintenance functions more efficiently
System security	Instructions on how to define users and user groups to ensure limited, password-controlled access to the system, and to increase screen-level security
Interface configuration	Instructions on how to configure the Infor EAM interface by personalizing the Start Center and modifying page layouts
Data collection	Instructions on how to track the movement of goods for asset and maintenance management
GIS administration	Instructions on how to integrate Infor EAM with GIS
Fleet management configuration	Instructions on how to configure the fleet management module
Archiving management	Instructions on how to archive Infor EAM records
Basic module data creation	Instructions on how to set up basic module data

About this guide

Chapter	Description
Installation parameters	Instructions on how to understand installation parameters and methods for modifying

Related documents

This guide references other documents. See these documents for more information about how to work within Infor EAM.

- *Infor EAM User Guide*
- *Infor EAM Installation Guide*
- *Infor EAM Reports User Guide*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

This chapter outlines procedures for setting up Infor EAM to manage physical assets and maintenance functions more efficiently.

Note: This chapter describes Infor EAM functions that only a system administrator has rights to perform.

Defining installation parameters

Define new installation parameters to tailor the system to your working environment. Set up system-wide defaults to determine settings such as whether department security is on or off or the number of days before a password expires for users. Infor EAM installation sets up default values, also known as "installation codes" or "installation parameters." You can also edit existing installation parameters.

Note: Only qualified Infor EAM system administrators should create installation parameters, with specific guidance and approval from your Infor consultant. Contact your Infor consultant to create installation parameters.

To define installation parameters:

- 1 Select **Administration > Security > Install Parameters**.
- 2 Click **New Record**.
- 3 Specify this information:

Install Parameter

Enter a unique code identifying the installation parameter, and then enter a description of the installation parameter in the adjacent field.

Note: You cannot define fixed install parameters or assign new install parameters to a module.

Value

Enter the default value for the parameter.

- 4 Click **Save Record**.

Setting up installation parameters

Update installation parameters as required to perform normal operations.

To set up installation parameters:

- 1 Select **Administration > Security > Install Parameter Setup**.
- 2 Installation parameter values are displayed in update mode. Update the installation parameter value, and then click **Save Record**.

Understanding entities

Entities are the fundamental core of the system. Configuration of entities and their respective codes determines what functions of the system are available and to which users. An entity is a table of related data pertaining to specific system functions.

There are three kinds of entities in the system: **Status Entities**, **Type Entities**, and **Code Entities**. The system identifies entities as **Extended Codes**, but they are identified to users as **User Codes**. When you install Infor EAM, all **Extended Codes** and **User Codes** are identical. Tailor the system to an organization by adding new user codes on the **System Codes** form.

Classes divide entities into groups that share certain characteristics. For example, you can subdivide an entity into classes to define a separate list of custom attributes for each class.

Defining system codes

Define system codes to tailor the system to the entity. You can also edit existing user codes.

Note: Infor strongly recommends creating new classes, rather than system codes, to subdivide Type entities when possible.

To define system codes:

- 1 Select **Administration > Setup > System Codes**.
- 2 Select the type of setup for which to define system codes.
- 3 Specify the **For Entity** for which to define system codes.
- 4 Click **Add User Code**.
- 5 Specify this information:

User Code

Specify a new user code to represent one of the system codes.

System Code

Specify the system code representing the user code.

Description

Specify a description of the user code.

Icon

Select the color of the icon to indicate the importance of the user code.

Note: This functionality is currently only available for the PWRS (Risk) and JBPR (WO Priority) entities on the screen.

Icon Path

Specify the URL path to the image you would like to use for the icon. Accepted icon paths begin with **http://**, **//**, or ****, or **https://**.

Note: The recommended size of the image is 16 x 16 pixels and file type extension should be .gif, .jpg, or .png.

System Default

Select one of the user codes as the system code if there are multiple user codes for one system code. This code is used as the default value for the Type or Status entity.

Out of Service

Select to designate system codes as out of service.

6 Click **Submit**.

Note: To update the translations by language, click **Translations**.

See the *Infor EAM User Guide*.

Creating and modifying screens

Create new screens or modify existing screens by associating icons with screens and setting background-printing parameters for reports.

Note: To view a list of current screens in the system, run the Function List Report.

To create or modify screens:

- 1 Select **Administration > Screen Configuration > Screens**.
- 2 Click **New Record**.
- 3 Specify this information:

Screen

Specify a unique six-character mnemonic code for the new screen, and then enter a brief description of the screen in the adjacent field.

Class

Specify the class of the screen.

Form Type

Select the form type for this screen.

Parent

Specify the screen on which this new screen is based.

Last Value

Specify the entity used by the system to "remember" the primary key field in this screen.

Icon

Specify the name of an existing icon file to associate an icon with the screen.

Report

Specify a report that prints (in the background) using the selected data on a screen. Also, specify background report parameters to use with this functionality.

Employee Filter

Specify the employee type to apply to the screen.

URL Path

Specify the URL location of the screen.

Note: Specify up to three parameters (:user, :password, or :org) in the URL Path to pass values to the new screen. These values must be entered in lowercase.

Example: `http://yourapp.yourserver.com?USERID=:user&PWD=:password`

Open URL in New Window

Select to display the URL in a new browser window.

Invoke Dataspy

Select to allow users to utilize dataspy filters on this screen.

Startup Action

Select the stage of the query process in which the screen opens:

- **No Action**
Select to open the form without running a Dataspy or displaying records.
- **Enter Insert Mode**
Select to open the form on the **Record View** tab and in Insert Mode.
- **Run Dataspy**
Select to open the form with the default Dataspy and to highlight the first record in the list.
- **Remember Dataspy**
Select to open the form with the last remembered Dataspy (within the current session) with quick filter and quick sort for the form and to highlight the first record in the list.

- **Remember Last Value**

Select to open the form with the last remembered value for the screen.

Startup View

Select the view in which the screen will display when initially accessed, e.g., select **Split View** to indicate the screen will open in split view format, select **List View** to indicate the screen will open in list view format, or select **Record View** to indicate the screen will open in record view format.

Split View Display

Select how the fields are displayed on the screen in the summary grid:

- **Standard**

Fields are displayed in the standard format, including the code and description fields, and icons.

- **Grid Fields**

Fields are displayed based on the dataspy settings. The code and description fields are not displayed

- **Mixed**

Fields are displayed in a combination of standard and grid field settings, including the code and description fields, and three fields from the dataspy settings.

Auto Refresh Timer (seconds)

Specify the time frequency in seconds in which the screen will automatically refresh, e.g., enter 15 to indicate the screen will refresh every 15 seconds.

Note: This feature only works in full list view mode for List View and Record View screens and user-defined grids.

4 Click Save Record.

Note: After defining a new screen, you must authorize users to use the new screen.

See "Granting screen-level permissions to user groups" on page 87.

Changing text on a specific screen

Change text on a specific screen if the text usage is in the wrong context for your local language.

Note: The changes you make might be overwritten during system upgrades or by global substitutions.

To change text on a specific screen:

- 1 Select **Administration > Screen Configuration > Screens**.
- 2 Select the screen for which to change text, and then click the **Text** tab.
- 3 Select the record for which to change text.

- 4 Specify this information:

Text

Change the text as necessary.

- 5 Click **Submit**.

Defining URL parameters for custom screens

Define how parameter values are passed to custom screens and tabs.

URL parameters designate locations and directories for schemas, servlets, documents, etc. that must be set for many Infor EAM (Oracle Forms) and Infor EAM add-ons and features to work properly.

To define URL parameters for custom screens:

- 1 Select **Administration > Screen Configuration > Screens**.
- 2 Select the screen for which to define URL parameters, and then click the **Record View** tab.
- 3 Click **Add URL Parameter**.
- 4 Specify this information:

Parameter Name

Specify a unique code identifying the parameter. The system automatically populates **Sequence** and selects **System**.

Parameter Value

Specify a URL for the parameter.

Active

Select if the URL parameter is active for the screen or tab.

- 5 Click **Submit**.
- 6 Click **Close**.

Defining custom tabs for screens

Define custom tabs for existing screens. Specify an external URL to transfer values from the current screen. The URL information displays inside the tab in the Infor EAM system.

To define custom tabs for a screen:

- 1 Select **Administration > Screen Configuration > Screens**.
- 2 Select the screen for which to define custom tabs, and then click the **Custom Tabs** tab.
- 3 Click **Insert Custom Tab**.
- 4 Specify a description for the new custom tab. A **Tab Code** is automatically generated.
- 5 Specify this information:

Type

Specify the custom tab type. URL is the recommended setting because it is the only supported value.

Trusted Site

Select to allow access to the parent frame.

URL

Specify the URL for the custom tab.

6 Click **Submit**.

Note: The key values are automatically passed from the header of the current form to the URL. This feature displays only information related to the selected record.

To define URL parameters for custom screens or tabs, click **Define URL Parameters**.

See "Defining URL parameters for custom screens" on page 20.

Remembering fields for forms

Determine which fields will have their values remembered when a user navigates away from the form. Selected fields to remember may consist of **Work Order**, **Equipment**, etc. When the user selects a **Work Order** and navigates away from the **Work Orders** form to another form such as Assets form, the system remembers the **Equipment** value and displays it on the **Assets** form.

Note: The Fields to Remember feature is only supported for forms that have a Last Value Entity populated on the **Record View** page of the **Screens** form.

To remember fields for forms:

- 1** Select **Administration > Screen Configuration > Screens**.
- 2** Select the screen for which to remember fields, and then click the **Fields to Remember** tab.
- 3** Click **Add Field**.
- 4** Specify this information:

Field

Specify the field of the value for the system to remember.

Entity

Specify the entity of the value for the system to remember.

5 Click **Submit**.

Associating Dataspies to users by screens

Add users to associate Dataspies to additional users on selected screens. Once a Dataspy is associated with a user on a specific screen, the Dataspy is available to the user whenever they open and view the screen.

To associate a Dataspy to users on a screen:

- 1 Select **Administration > Screen Configuration > Screens**.
- 2 Select the screen for which to associate users to a Dataspy, and then click the **Dataspies** tab.
- 3 Select the non-global Dataspy record to which to add user associations on this screen, and then click **Add Users**. The Add Users popup is opened.
- 4 Select one or more users to receive a copy of this Dataspy for the selected screen.
- 5 Optionally, select the **Set as Default** check box to set the Dataspy as the default for the selected user(s) on this screen.

Note: If the selected Dataspy is marked as a global Dataspy, select one or more users to receive the Dataspy as their default Dataspy on this screen.

- 6 Click **Submit**. The Add Users popup is closed.

Viewing Dataspies associated to screens

View all Dataspies and their associated users on selected screens.

Note: You cannot create a new Dataspy record, nor delete an existing Dataspy record on this screen. You can only associate users to the Dataspies on the screens.

To view a Dataspy associated to a screen:

- 1 Select **Administration > Screen Configuration > Screens**.
- 2 Select the screen for which to view Dataspy records, and then click the **Dataspies** tab.
- 3 View the Dataspy details including owners of the Dataspy on the selected screen.
- 4 Optionally, select the **Default** check box to make this the default Dataspy for all users on this particular screen.
- 5 Click **Submit**.

To display the selected Dataspy details on the selected screen for other users, click the **Add Users** button. The Add Users popup is opened. See "Associating Dataspies to users by screens" on page 22.

Creating user defined screens

Create, modify, delete, and view user defined screens.

To create user defined screens:

- 1 Select **Administration > Setup > User Defined Screens**.
- 2 Click **New Record**.
- 3 Specify a unique six-character mnemonic code for the new user defined screen in the **Screen Name** field, and then enter a brief description of the screen in the adjacent field.

Note: For user defined screens, the second letter of the screen name must be a **U**, the length of the screen name cannot exceed six characters, and the screen name cannot contain special characters.

- 4 Specify this Screen Details information:

Table Name

Specify a unique code identifying the table to which the user defined screen belongs. The table name cannot contain special characters.

Note: For tables that are generated a *U5* prefix is automatically added to the table name. For example, if you create a table called "MyTable", the generated table name will be "U5MYTABLE".

Entity

Specify a unique code identifying the entity to which the user defined screen belongs. The entity name cannot contain special characters.

- 5 Optionally, select the **Tab** check box to indicate this user defined screen is a tab on another screen. If selected, you must specify the **Parent Screen** to which the tab belongs.
- 6 Optionally, select the **Out of Service** check box to prevent the new user defined screen from being displayed in user defined screen lookups or in the grids for the **Menus** and **Scanner Menus** tabs on the **User Groups** form.
- 7 Click **Save Record**.

Note: Add fields to the new user defined screen on the **Fields** tab. Once you add fields, click the **Generate** link button to generate the new user defined screen. The screen is compiled, and it is added to the list of screens you can make available on the menu.

Defining fields for user defined screens

Create, modify, or delete fields for user defined screens.

To define fields for user defined screens:

- 1 Select **Administration > Screen Configuration > User Defined Screens**.
- 2 Select the user defined screen for which to define fields, and then click the **Fields** tab.
- 3 Click **Add Field**.
- 4 Specify this information:

Field Name

Specify the name for the field. The field name must be unique and cannot be a database reserved word or contain special characters.

Description

Specify a description of the field.

Field Label

Specify the boiler text for the field. The default **Field Label** is equivalent to the **Field**.

Sequence

Specify a numeric value for the sequence. Fields are displayed in ascending order by their sequence.

Field Type

Specify the field type. The default **Field Type** is **Alphabetic**. Specify the default **Field Type** as one of the following options:

- Alphabetic
- Numeric
- Date
- Date Time
- Time
- Free Format Text
- Checkbox

Field Length

Specify the maximum character length if the field type is **Alphabetic**.

Total Digits

Specify the total number of digits allowed including decimal places for the field if the **Field Type** is **Numeric**.

Decimal Places

Specify the number of digits allowed after the decimal for the field if the **Field Type** is **Numeric**.

Computed Data

Specify the computed data statement for the field when **Field Type** is **Computed Value**.

Source Field

Specify the source field if the value will be retrieved from another database table.

Query Code

Specify the query code to define the list of values available for selection from the LOV. When a query code is specified for a field, the field behaves as an LOV.

Parent Screen Key Field

Specify the key field of the parent screen of this field if the user defined screen for which you are defining this field is the tab on a parent screen.

- 5 Optionally, select the **Is Primary Key** check box to indicate that there cannot be another record with the same value in that field. Field types of **Free Format Text**, **Checkbox**, **Date**, **Date Time**, and **Time** cannot be selected as primary key fields.
Note: If **Auto Generate Key** is selected on the header record for this user defined screen, **Is Primary Key** is protected because the primary key is auto-generated.
- 6 Optionally, select the **Is Nullable** check box to allow users to leave the field blank.
Note: **Is Nullable** is a protected check box that cannot be edited when a field is selected as a primary key.
- 7 Optionally, select the **Uppercase** check box to enforce uppercase characters for the field value when the field type is **Alphabetic**.
- 8 Optionally, select the **Computed Value** check box to indicate the defined field will use the valued entered in the **Computed Data** field to calculate the field value.
- 9 Optionally, select the **Retrieved Value** check box to indicate the value for this field will be populated from a database table or other screen using the **Retrieved Value Query**. If selected, the **Source Field** and **Retrieved Value Query** are required as well.
Note: **Retrieved Value Query** must return one record and one column only.
- 10 Optionally, select the **Out of Service** check box to prevent the field from being displayed in user defined screen lookups.
- 11 Click **Submit**.

Defining custom fields information

Tailor the system for the working environment by adding custom fields to forms.

Defining custom fields

Define an unlimited number of new fields, and attach a selection of these fields to any class of an entity, such as an equipment class or a purchase order class, or to an entity, such as all equipment or all purchase orders.

Specify valid lookup values for a custom field using the **Associate Custom Fields** form.

See "Associating custom fields with an entity or class" on page 27.

To define custom fields:

- 1 Select **Administration > Custom Fields > Custom Fields**.
- 2 Click **Add Custom Field**.
- 3 Specify this information:

Custom Field

Enter a unique code identifying the field, and then enter a description of the field in the adjacent field. The description is the text that the user will see for the custom field.

Type

Select one of the following field types:

- **Character**
Any alphanumeric characters.
- **Numeric**
Numeric values.
- **Date Field**
Date values in DD-MON-YYYY format.
- **Date/Time**
Date and time values in DD-MON-YYYY HH24:MI format.
- **Code+Description**
Unique code and a description of the code.
See "Defining lookup values for custom fields" on page 26.
- **System Entity**
Code description of an Infor EAM entity. The system enables the System Entity field.

System Entity

Enter the code description of the entity for which to define custom fields.

Minimum Value

Maximum Value

Specify the range of values users can enter.

4 Click **Submit**.

Note: To view translations information, select the custom field for which to view translations, and then click **Translations**.

See the *Infor EAM User Guide*.

Defining lookup values for custom fields

Define lookup values for custom fields of the "Code+Description" type.

To define lookup values for custom fields:

- 1 Select **Administration > Associate Custom Fields > Associate Custom Fields**.

2 Specify this information:

Entity

Enter the entity for which to define a lookup value.

Select the custom field **Line** for which to define lookup values.

Click **Define Lookup Values**.

Click **Add Value**.

Value

Enter the value for the lookup.

Description

Enter a description of the value.

Note: **Description** field is only enabled if the Lookup Type is Code+Description.

Out of Service

Select if the lookup value is out of service.

3 Click **Submit**.

Associating custom fields with an entity or class

Fields associated with a class appear only when the class has been specified in the regular class field. Fields associated with an entity (class is *) always appear on screens based on that entity, whether or not a class has been specified.

To associate custom fields with an entity or class:

1 Select **Administration > Custom Fields > Associate Custom Fields**.

2 Enter the entity to which to associate the custom field. The system automatically populates the entity description. The system automatically populates **Class** and **Class Org**.

3 Click **Add Custom Field**.

4 Specify this information:

Line

Enter the desired order for displaying the custom fields. The system displays fields associated with the entity (i.e., to class *) first and then displays the fields associated with the particular class of the data.

Custom Field

Enter the code of the custom field. The system automatically populates the description.

UOM

Enter the unit of measure.

Lookup Type

Select one of the following lookup types for the custom field:

- **None**
Enter any value for this field.
- **Property**
The lookup is valid for the field without restriction to which entity or class it is attached. This lookup applies system-wide. You must define the list on the same level. If the custom field is of Type Code+Description, the default **Lookup Type** is Property. Refer to Defining Custom Fields.
- **Entity**
The lookup displays values specific to the field and entity. Therefore, the lookup may have different values for items such as equipment or parts.
- **Class**
The lookup displays values specific to the field, entity, and class. Therefore, the lookup may have different values within items such as entity parts.

Not Updateable

Select when the system retrieves values from the category of data instead of from the data itself.

Print Custom Fields

Select to enable the system to print the custom field on work order cards.

Note: **Print Custom Fields** is only enabled for custom fields associated with the OBJ and EVNT entities.

Use for Validation

Select to allow users to enter only values that are in the lookups for the field. If unselected, users can also enter values that are not in the lookups.

5 Click **Submit**.

Defining global text changes

Access the **Global Text Changes** form to change boiler text (field labels) throughout the system rather than using screen designer on each separate screen where the boiler text appears. Making global text changes creates system-wide terminology changes. Any changes made on the **Global Text Changes** form are applied to all Infor EAM forms where the specified text appears.

Note: Error messages, function titles, and code descriptions cannot be changed using the **Global Text Changes** form.

It is possible to have duplicate texts within the system. Changing one will not affect the other.

To define global text changes:

1 Select **Administration > Setup > Global Text Changes**.

2 Specify the search criteria in the Dataspy, and then select the record to update.

3 Specify this information:

Alternate Text

Specify the text for the new boiler text.

4 Click **Submit**.

Note: To reverse the text change for the selected record, click **Undo**. The **Original Text** becomes the **Current Text** for the selected record.

To reverse all of the system boiler text changes, click **Undo All**.

To update all of the system boiler text changes, click **Redo All**.

Displaying boiler text where used

To display boiler text where used:

1 Select **Administration > Setup > Global Text Changes**.

2 Enter the search criteria in the Dataspy, and then select the record to update. The system automatically populates **Current Text**, **Original Text**, **Language**, **Code**, and **Last Updated**.

3 Click **Where Used**.

4 The system displays all screens where the selected record appears.

Defining cost codes

Define cost codes for the organization, and then reference them along with any data involving costs, such as work orders, purchases, material issues, etc. Charge maintenance costs to the correct area by specifying cost codes. The cost for repairing a unit air conditioner, for example, might come out of a particular department's budget.

Note: Cost codes simplify tracking costs; however, they might hinder data entry because you must specify cost codes along with the data.

To define cost codes:

1 Select **Administration > Setup > Cost Codes**.

2 Click **New Record**.

3 Specify this information:

Organization

Specify the organization to which the cost code belongs if you use multi-organization security.

Cost Code

Specify a unique code identifying the cost, and then specify a description of the cost code in the adjacent field.

Class

Specify the class of the cost code.

Non-billable

Select to prevent the cost code from being included when bills are generated.

Out of Service

Select to prevent the cost code from being displayed in lookups.

Transactions associated with non-billable cost codes will not be included in fleet bills.

Account Segment Value

Specify the general ledger account code segment that represents the organization in your accounting structure. See your chart of accounts for more information.

- 4 Click **Save Record**.

Selecting languages

Configure the system to operate in more than one language. This feature is especially useful for multinational organizations and for companies in bilingual countries, such as Belgium (French and Flemish) and Canada (English and French).

When the system is configured with two or more languages, these languages will be predefined in the system. It is possible to define extra languages. Defining other languages is useful when creating purchase orders, quotation requests, etc., for suppliers in other languages.

To accommodate multilingual transactions, add free-format text in both your own language and in the supplier's language. While you can inspect the text in your own language using the corresponding features, the text in the supplier's language will be printed on the form that will be sent to the supplier.

Adding a new language

Infor EAM is delivered with support for nine language translations. Any of these languages that are not initially installed are classified as **Available**. Use **Install Available Language** to install any of these languages at a later date.

To add a non-supported language, languages not delivered in Infor EAM: first add the language, next make the language available, install the language, and then designate the language as **Active** to use the language.

To add a new language:

1 Select **Administration > Setup > Languages**.

2 Click **New Record**.

3 Specify this information:

Language

Enter a unique code identifying the language, and then enter a description of the language in the adjacent field. The system automatically populates **Available** and **Installed**.

Note: **Language** must be less than or equal to two letters.

Out of Service

Select to indicate the language is out of service.

4 Click **Save Record**.

Note: To make a language **Available**, click **Make Language Available**.

To install an available language, click **Install Available Language**.

To refresh an installed language, click **Refresh Installed Language**.

Making a language available

Designate an installed language as **Available** to use in Infor EAM.

To make a language available:

1 Select **Administration > Setup > Languages**.

2 Select a language to make available, and then click the **Record View** tab.

3 Click **Make Language Available**.

4 Specify this information:

Language

Select the language from which to copy the available language.

5 Click **Submit**.

Installing an available language

Install a language after it has been made **Available**.

Note: The system will not install the language until it has first been made **Available**.

To install an available language:

1 Select **Administration > Setup > Languages**.

2 Select a language to install, and then click the **Record View** tab.

- 3 Click **Install Available Language**. The system automatically populates **Install/Upload Started**, **Processing Status**, and **Install Upload Completed** on the **Record View** page.

Refreshing an installed language

Prior to refreshing a language, the language must be added, made available, and installed.

See "Adding a new language" on page 30.

To refresh an installed language:

- 1 Select **Administration > Setup > Languages**.
- 2 Select a language to refresh, and then click the **Record View** tab.
- 3 Click **Refresh Installed Language**.
- 4 Choose one of the following options:

Refresh All Dates

Select to refresh all translated text.

Refresh Since

Select to refresh translated text beginning with the selected **Date**.

- 5 Specify this information:

Boiler Text

Select to refresh boiler text.

Code Description Text

Select to refresh code description text.

Error Text

Select to refresh error text.

Menu Text

Select to refresh menu text.

- 6 Click **Submit**.

Viewing the current status of boiler text records for new languages

View the current status of boiler text records in the system. Use the export to MS Excel functionality to initiate the first or next round of language translation.

To view the current status of boiler text records for new languages:

- 1 Select **Administration > Setup > Languages**.

- 2 Select the language for which to view current status of boiler text records, and then click the **Boiler Text** tab.
- 3 Specify this information:
Comparison Language
Enter the language for which to compare the boiler text.
- 4 View the translated and untranslated boiler text.
Note: To download all selected records to MS Excel, click **Save Grid to Excel**.

Viewing the current status of code description text records for new languages

View the current status of code description text records in the system. Use the export to MS Excel functionality to initiate the first or next round of language translation.

To view the current status of code description text records for new languages:

- 1 Select **Administration > Setup > Languages**.
- 2 Select the language for which to view current status of code description text records, and then click the **Code Description Text** tab.
- 3 Specify this information:
Comparison Language
Enter the language for which to compare the code description text.
- 4 View the translated and untranslated code description text.
Note: To download all selected records to MS Excel, click **Save Grid to Excel**.

Viewing the current status of error text records for new languages

View the current status of error text records in the system. Use the export to MS Excel functionality to initiate the first or next round of language translation.

To view the current status of error text records for new languages:

- 1 Select **Administration > Setup > Languages**.
- 2 Select the language for which to view current status of error text records, and then click the **Error Text** tab.
- 3 Specify this information:
Comparison Language
Enter the language for which to compare the error text.

- 4 View the translated and untranslated error text.

Note: To download all selected records to MS Excel, click **Save Grid to Excel**.

Viewing the current status of menu text tab for new languages

View the current status of menu text records in the system. Use the export to MS Excel functionality to initiate the first or next round of language translation.

To view the current status of menu text tab records for new languages:

- 1 Select **Administration > Setup > Languages**.
- 2 Select the language for which to view current status of menu text tab records, and then click the **Menu Text** tab.
- 3 Specify this information:

Comparison Language

Enter the language for which to compare the menu text tab.

- 4 View the translated and untranslated menu text tab.

Note: To download all selected records to MS Excel, click **Save Grid to Excel**.

Defining closing periods

The system gathers maintenance costs on an ongoing basis. When you are ready to process those costs, define closing periods. Typically, closing periods occur at the end of every month, although some companies process transactions on a quarterly basis. When the specified date arrives, the system freezes all of the relevant data, and a new costing period begins.

Note: Define closing periods just before transferring transaction data to another system for account processing (general ledger, accounts payable, accounts receivable, etc.).

To define closing periods:

- 1 Select **Administration > Security > Closing Periods**.
- 2 Click **Add Closing Period**. The system automatically populates **Date Entered** with the current server system date.
- 3 Specify this information:

Closing Date

Enter the closing date for the period.

Note: **Closing Date** must be in the past because changes to time sheets, issues and receipts, purchases, and other transactions cannot occur before the date established by the **Closing Period**.

4 Click **Submit**.

Note: You cannot delete closing periods.

Creating and modifying locales

Create or modify locale settings for users. The system supports the locale at the user level, organization level, and global level (installation parameter). The system automatically employs the locale of the user. If this locale is not valid, then the system uses the locale of the default organization of the user. Finally, if that locale is not valid, then the system employs the locale of the global setting.

To create or modify locales:

- 1 Select **Administration > Setup > Locales**.
- 2 Click **New Record**.
- 3 Specify this information:

Locale

Enter a unique code identifying the locale, and then enter a description of the locale in the adjacent field.

Monetary Decimal Separator

Enter the symbol used as the monetary decimal separator of the locale.

Monetary Group Separator

Enter the symbol used to separate monetary groupings in the locale.

Monetary Group Digits

Enter the number of digits needed to separate monetary groups in the locale.

Monetary Decimal Places

Enter the number of digits to appear after a monetary decimal in the locale.

Negative Symbol

Enter the symbol used to indicate a negative number in the locale.

Date Format

Select the date format of the locale.

Numeric Decimal Separator

Enter the symbol used as the numeric decimal separator of the locale.

Numeric Group Separator

Enter the symbol used to separate numeric groupings in the locale.

Numeric Group Digits

Enter the number of digits needed to separate numeric groups in the locale.

Numeric Decimal Places

Enter the number of digits to appear after a numeric decimal in the locale.

Positive Symbol

Enter the symbol used to indicate a positive number in the locale.

First Day of Week

Select the first day of the week in the locale.

- 4 Click **Save Record**.

Defining documents

Organizations involved with maintenance have much supporting documentation, including schematics and drawings, reference guides and user manuals, warranties, manufacturer claims, and delivery notes.

In addition, organizations can store information electronically on computer diskettes, CAD drawings, CDs, videos, or audiotapes. Infor EAM makes it easier to manage this information by allowing organizations to store entire libraries of documents.

Assign a code to documents, specify track revision information, and identify the location of the document.

When setting up electronic document files, consult your system administrator before defining documents to determine if directories have already been set up.

To define documents:

- 1 Select **Administration > Setup > Documents**.
- 2 Click **New Record**.
- 3 Specify this information:

Organization

Specify the organization to which the document belongs if you use multi-organization security.

Document

Specify a unique code identifying the document, and then enter a description of the document in the adjacent field.

Revision Number

Specify the revision number of the document, e.g., if you have updated the document since the document was entered in the system, enter 1.

Original Code

Specify the original code of the document.

File Location

Specify the location of the file.

File Type

Specify the type of file, such as word document (DOC), spreadsheet (XLS), etc.

IDM Document Type

Specify the document type if you are uploading it from the Infor Document Manager system.

Effective Date

Specify the date to make the document available in the system to users of this organization.

Expiration Date

Specify the date the document at which the document is no longer available to those users in the system.

Title

Specify the title of the document.

Class

Specify the class of the document.

Revision Date

Specify the date of the latest document revision.

Pages

Specify the number of pages in the document.

File Path

Specify the file path of the document, such as URL (www.infor.net), filename (infor.doc), etc.

- 4 Optionally, select the **Out of Service** check box to prevent the document from displaying in lookups across the system.
- 5 Click **Save Record**.

Note: Click **Upload Document** to upload an existing document record to the server. A document record must already exist and cannot have unsaved changes to upload it from the **Documents** form. After uploading a document, **File Type** is automatically populated with **Uploaded Document** and **File Path** with the file name.

See the *Infor EAM User Guide*.

Click **View Document** to view the document.

To view or remove a document association, click the **Where Used** tab.

See "Removing document associations" on page 37.

Removing document associations

View entity associations for documents, and then remove entity associations as necessary.

To remove a document association:

- 1 Select **Administration > Setup > Documents**.

- 2 Select the document for which to remove an entity association, and then click the **Where Used** tab.
- 3 Select the entity to disassociate from the document, and then click **Remove Document Association**.

Setting up access to external documents

Set up access to external documents by defining a URL or file path installation parameter for files. When accessing an external document, the system looks for the URL or file path you have defined as an installation parameter for a particular file type or category to display the document.

Define the URL or file path as URLxxx where xxx is the value of **File Type** on the Documents form. For example, you might enter the code URLPDF to access a .PDF file. Then you would enter the URL or file path indicating the location where all .PDF files are stored on the web or network, e.g., \\mycompany\myserver.com\documents\PDFs. When you access an external document after setting up access to external documents, the system identifies the document type or category and then opens the file using the URL indicating where documents of the specified type or category are stored and the specific **File Path** you entered on the Documents form. Thus, the full path to the specific document you wish to access might be \\mycompany\myserver.com\documents\PDFs\PDFattachment.pdf.

Note: The URL can be a path to the web or a directory. You can separate URLs by type, e.g., .DOC or .PDF or by a chosen category, e.g., Safety (URLSAF) or Vendors (URLVEN).

To set up access to external documents:

- 1 Select **Administration > Security > Install Parameters**.
- 2 Click **New Record**.
- 3 Specify this information:

Install Parameter

Enter a unique code identifying the URL installation parameter, e.g., URLPDF, and then enter a description of the URL installation parameter in the adjacent field.

Note: You cannot define fixed install parameters or assign new install parameters to a module.

Value

Enter the full path to the URL that contains files of the specified type or category, e.g., \\mycompany\myserver.com\documents\PDFs.

- 4 Click **Save Record**.

Setting up printers

To set up printers:

- 1 Select **Administration > Setup > Printers**.

2 Click **New Record**.

3 Specify this information:

Organization

Enter the organization to which the printer belongs if you use multi-organization security.

Printer

Enter a printer code to link the printer to a specific device, and then enter a description of the printer in the adjacent field.

Note: **Printer** is case sensitive; it accepts mixed-case records.

Destination

Enter a unique destination identifying the path to the printer.

Special

Select to prevent the printer from being displayed in the **Printer** lookup when printing reports.

4 Click **Save Record**.

Defining classes

Define classes for most entities. You can separate a single entity into groups, most often for cost analysis. For example, you can assign classes to equipment, and then give all air conditioning units a class of "HVAC." With this information, an analysis that compares the cost of maintaining all HVAC units is provided.

To define classes:

1 Select **Administration > Setup > Classes**.

2 Specify the entity for which to create classes.

3 Click **Add Class**.

4 Specify this information:

Class

Specify a unique code identifying the class.

Description

Specify a description of the class.

Note: When editing a class, you can only edit the **Description**.

Organization

Specify the organization of the class if you use multi-organization security.

Coding Entity

Select the coding entity with which to associate the class.

Level

Specify the level of the class.

Out of Service

Select to prevent the class from being displayed in lookups.

Note: **Coding Entity**, **Level**, and **Out of Service** apply only to the CLVL entity.

Property Definition

Select the property definition with which to associate the class.

Note: **Property Definition** applies only to the OBJ entity.

5 Click **Submit**.

Note: To update the translations by language, click **Translations**.

See the *Infor EAM User Guide*.

Defining classes and custom fields

Define class records for entities. Classes allow you to segment a single screen into groups for cost analysis or other comparisons.

To define classes and custom fields:

- 1** Open the **Classes and Custom Fields** form.
- 2** Click **New Record**.
- 3** Specify this information:

Class

Enter a code for the class, and then enter a description in the adjacent field.

Organization

Enter the organization if you use multi-organization security.

Screen

Select the form for which to create the class.

Out of Service

Select to indicate the class is out of service.

- 4** Click **Save Record**.

Associating custom fields with classes

Define custom field records or select existing custom fields and associate them with a selected class.

To define associate custom fields with classes:

- 1 Select **Administration > Setup > Classes**.
- 2 Select the class for which to associate custom fields, and then click the **Custom Fields** tab.
- 3 Choose one of the following options:
 - **To add a new custom field**
Click **Add Custom Field** to add a new custom field to associate with a selected class. Specify the information below.
 - **To add an existing custom field**
Specify the custom field to associate with the selected class. The system automatically displays a list of values for the custom field. Select a value, and the system displays the **Custom Fields** page and automatically populates **Custom Field**, custom field description, and **Type**.
- 4 Specify this information:
 - Custom Field**
Enter a code for the new custom field, and then enter a description in the adjacent field.
 - Line**
Enter a value for the line.
 - Type**
Select a type for the custom field.
 - Print on Work Order Report**
Select to print the custom field on the work order report.
 - Enforce Lookup Validation**
Select to require lookup validation for the custom field.
 - Minimum Value**
Enter the minimum value required for the custom field.
 - Maximum Value**
Enter the maximum value allowed for the custom field.
 - Enable Lookup**
Select to enable lookup for the custom field.
- 5 Click **Submit**.

Setting up field filters for screens

The **Screen Setup** form allows administrators to configure the options available in lookup fields for users on specific screens.

Set up field filters for equipment and work order types on specific screens by specifying which equipment and work order types are available for selection by a user on the screens.

Using the following check boxes the administrator can set the following filters for fields on selected screens:

- **Type**

If selected, on the record view of the selected screen, the system displays the types listed on the **Types** tab in the **Types** lookup.

Only equipment/work orders that belong to **Types** listed in **Field Filter** setup will be displayed in the **List View** of the selected screen.

Note: An equipment type can be linked to more than one screen; however, only one type can be flagged as the default screen type for the selected screen.

The list of screens for which the administrator can filter the types and classes is predefined. Users cannot insert or delete records.

- **Class**

Enable the class filter for selected screens. If selected, on the **record view** of the selected screen, the **Class** lookup will only display the classes listed on the **Class** tab. Only equipment or work orders that belong to **Classes** listed in **Field Filter** setup will be displayed in the **List View** of the selected screen.

- **WO Equipment Type**

On the selected **Work Order** screen, the **Equipment** lookup field displays the equipment types that are also listed on the **WO Equipment Type** tab.

- Select the **Filter WO Equipment Type** checkbox to enable the **WO Equipment Type** filter for the selected screen.

Note: This check box must be selected only for work order screens.

- **Operator Checklist**

Specify task plans and equipment classes that will display in the Task Plan and Equipment Class lookups for users on the Operator Checklists screens.

- **Reservation Calendar**

If the selected record is a **Reservation Calendar** screen, the **Filter WO Equipment Type** checkbox is protected as are the specific **Organization** and **Class**.

Setting up classes for screens

Select classes for equipment or work orders. Administrators can specify which class must be displayed for a user on the related screens.

To set up classes:

- 1 Select **Administration > Screen Configuration > Screen Setup**.

- 2 Select the screen for which to set up classes for equipment or work orders, and then click the **Record View** tab.
- 3 Select the **Filter Class** check box to filter the class records in the class lookup for the selected screen.
- 4 Select the **Classes** tab.
- 5 Click **Add Class** to add classes to the class lookup on the selected screen.
- 6 Specify this information:

Class

Select the class to display in the class lookup on the selected screen, and then click **OK**.

Note: To select multiple classes to display in the class lookup on the selected screen, click **Select Class**. Select the classes, and then click **Submit**.

- 7 Click **Submit**.

Setting up types for screens

Select types for equipment or work orders. Specify which equipment or work order types must be displayed for a user on the related screens.

Note: The user can select a type, only if the **Filter Type** checkbox is selected in the Record Viewscreen.

To set up types:

- 1 Select **Administration > Setup > Screen Setup**.
- 2 Select the screen for which to set up the types for equipment or work orders, and then click the **Record View** tab.
- 3 Select the **Filter Type** check box to filter types for equipment or work orders on the selected screen.
- 4 Select the **Types** tab.
- 5 Click **Add Type** to add the equipment or work order type to the selected screen.
- 6 Specify this information:

Type

Select the type of equipment or work order.

Note: To select multiple types for the selected screen, click **Select Types**. Select the types, and then click **OK**.

Default Screen Type

If this checkbox is selected, the system defaults the equipment type or work order type to the type defined as the **Default Screen Type**.

- 7 Click **Submit**.

Setting up work order equipment types for screens

Set up work order equipment types. Specify which work order equipment types will display for a user on the related screens.

To set up work order equipment types for screens:

- 1 Select **Administration > Setup > Screen Setup**.
- 2 Select the screen for which to set up the types for work order equipment, and then click the **Record View** tab.
- 3 Select the **Filter WO Equipment Type** check box to filter work order equipment types for the selected screen.

Note: The user can select a work order equipment type, only if the **Filter WO Equipment Type** checkbox is selected on the **Record View** screen.

- 4 Click the **WO Equipment Types** tab.

Note: **Filter WO Equipment Type** can only be selected for work order screens.

- 5 Select the **Add WO Equipment Type** check box to add the equipment type to the selected screen.

Note: To add multiple work order equipment types, click **Select WO Equipment Type**. Select the work order equipment types, and then click **Submit**.

- 6 Specify this information:

WO Equipment Type

Select the work order equipment type.

- 7 Click **Submit**.

Specifying operator checklists for screen setup

Specify which task plans and equipment classes will display in the task plan and equipment class lookups on the **Operator Checklist** screens.

To specify operator checklists for screen setup:

- 1 Select **Administration > Screen Configuration > Screen Setup**.
- 2 Select the screen for which to specify operator checklists, and then click the **Operator Checklist** tab.
- 3 Click **Add Record**.
- 4 Specify this information:

Equipment Class

Specify the equipment classes to be filtered in the equipment lookups on the **Operator Checklist** screens. **Equipment Class Org.** is automatically populated.

Task Plan

Specify the task plan to display in task plan lookups on the **Operator Checklist** screens. The task plan description and **Task Plan Org.** are automatically populated.

Complete Status

Specify the operator checklist complete status.

Cancel Status

Specify the operator checklist cancel status.

Default

Select this check box to indicate no more than two **Operator Checklist** screens will be flagged as the default screen type for the same equipment class-task combination specified here.

- 5 Click **Submit**.

Creating part hierarchy codes

Create part hierarchy codes to create a coding structure that enables you to further define parts by classifying them into specific levels.

Before creating part hierarchy codes, you must first define the code levels for the part code hierarchy entity (CLVL) on the **Classes** form.

See "Defining classes" on page 39.

After defining the code levels for the Part code hierarchy entity, you can then create part hierarchy codes to define a structured hierarchy between part code combinations. You can define a maximum of eight coding levels for parts.

To create part hierarchy codes:

- 1 Select **Materials > Setup > Part Hierarchy Codes**.
- 2 Click **Add Hierarchy Code**.
- 3 Specify this information:

Description

Enter a description of the part code hierarchy.

Enter the different levels of the part code hierarchy beginning with [Level 1] through [Level 8].

Note: You cannot enter a code for a level until you have entered a code for the previous level, e.g., you cannot enter a code for [Level 2] if you have not defined [Level 1].

The system displays the number of code structure levels based on the number of classes you have defined for the Part code hierarchy entity. For example, if you have defined four code levels for the Part code hierarchy entity on the **Classes** form, the system displays four levels for the code hierarchy [Level 1] – [Level 4].

To update the translations by language, click **Translations**.

See the *Infor EAM User Guide*.

- 4 Click **Save Record**.

Defining account details

Access account detail code information on different forms within the system for which the **Account Details** page is available.

Note: Account detail codes are defined for use with Databridge and external accounting systems.

The system displays the account detail codes associated with the entity of the form from which you access the **Account Details** page. The fields displayed on the Account Details are based on the entity of the form. For example, the fields for the REQL entity (Requisition Lines) are the Requisition Number, Organization, and the Requisition Line. You can view detailed account code segment information, copy an existing account detail record, modify an existing account detail record, or insert a new account detail record. You can also create account detail records for any entity records for which there are no existing account details.

To define account details:

- 1 From any form for which account details is activated, click the **Account Details** tab.
- 2 Select the entity for which to access account details. The fields for the selected entity are displayed for information only and are protected. Only the account detail fields are editable.
- 3 Specify this information:

Accounted

Select whether the account details should be accounted for as a debit or a credit.

Note: If the ACCOUNT installation parameter is set to YES, **Accounted** is required. If ACCCOUNT is set to NO, the system automatically populates **Accounted** with an asterisk (*).

Segment 01

Segment 30

Enter the account code segment(s) for the account detail record as you have defined the account code segment codes on the **Account Detail Setup** form.

Note: The system displays only the account code segments that you defined, up to 30 total segments. For example, if you defined segments 01 through 10, the system displays fields for **Segment 01** through **Segment 10**.

If a segment code is defined with a query code on the **Account Detail Setup** form, then the system displays a list of values for the segment code enabling you to view the results of the SQL statement for the code.

If a specific segment code is designated as **Required** on the **Account Detail Setup** form, then the segment field is required for the account detail record on the **Account Details** tab.

- 4 Click **Submit**.

Note: You can change the name of a segment to something specific to your accounting needs as necessary using screen designer.

To create additional account detail records based on an existing record, click **Copy Record**.

If the ACCOUNT installation parameter is set to YES, the system sets **Accounted** to the opposite value of the record from which you are copying the account details. For example, if the value of **Accounted** is **Credit** for the existing record, the system sets **Accounted** to **Debit** for the copied record.

Defining capital request categorization codes

Define capital request categorization codes for use on the **Capital Planning Request** form.

See the *Infor EAM User Guide*.

Note: The system will be pre-populated with data from the ASTM UNIFORMAT II Classification for Building Elements (E1557-97).

To define capital request categorization codes:

- 1 Select **Administration > Setup > Capital Request Categorization Codes**.
- 2 Click **Add Categorization Code**.
- 3 Specify this information:

Description

Enter the description of the capital request categorization code.

Major Group Element

Enter the major group element.

Note: **Major Group Element**, **Group Element**, and **Individual Element** cannot contain periods (.).

Group Element

Enter the group element.

Note: In order to create a new **Group Element**, you must first create a new **Major Group Element**.

Individual Element

Enter the individual element.

Note: In order to create a new **Individual Element**, you must first create a new **Major Group Element** and a new **Group Element** combination.

- 4 Click **Submit**.

Auditing attributes

The system provides a flexible way to track changes of every attribute for almost every table. When a user enters, updates, or deletes an attribute, the system records the old value, new value, user code, function used, and date/time stamp. To activate this auditing, you must know the field and the technical name of the table to track. The system cannot track tables that do not appear in lookups or have no primary key.

Note: The number of audits might grow very fast; purge data frequently to aid system performance. See "Purging audit records" on page 49.

Setting up audit triggers

Set up audit triggers to monitor attribute changes to records. Create audit trail triggers to define what changes to which attributes you should audit. Once you know the field and the technical name of the table to track, set up audit triggers.

To set up audit triggers:

- 1 Select **Administration > Security > Audit Setup**.
- 2 Enter the table for which to set up audit triggers.
- 3 Click **Add Trigger**.
- 4 Specify this information:

Field

Specify the field to audit, and then enter a description in the adjacent field.

Update

Select to track updates.

Insert

Select to track insertions.

Delete

Select to track deletions.

- 5 Enter additional comments concerning the trigger.
- 6 Click **Submit**.

Viewing trigger status values

To view trigger status values:

- 1 Select **Administration > Security > Audit Setup**.
- 2 Enter the table for which to view the audit.
- 3 Select the field for which to view the trigger status, and then click the **View Trigger Status**.

4 Specify one of the following options:

- **Refresh Audit Triggers**

All audit triggers are dropped from the table, audit triggers are recreated for each of the fields selected, and then the Audit Setup list is updated.

- **Drop Audit Triggers**

All audit triggers are dropped.

5 View the audit information.

6 Click **Close**.

Purging audit records

Purge audit records. Purge data frequently to aid system performance.

To purge audit records:

1 Select **Administration > Security > Audit Setup**.

2 Enter the table for which to purge audit records, and then click **Purge Audit Records**.

3 Specify this information:

From Date

Enter the date from which the audit records will be purged.

To Date

Enter the date up to which the audit records will be purged.

Note: To purge the current date's audit records, enter tomorrow's date in **To Date**.

4 Click **Submit**.

5 Click **Close**.

Administering comments and custom fields audit flags

Administer comments and custom fields audit flags. Select the entities for which the system tracks audit flags, ensuring that the system records all changes to comment and custom field records for the particular entity.

To administer comments and custom fields audit flags:

1 Select **Administration > Security > Audit Setup**.

2 Click the **Comments and Custom Fields** tab.

3 Select the checkbox next to the entity for which to maintain an audit trail of comments and/or custom fields.

Viewing audits

After setting up the auditing features in the system, you can view audits for fields or view audit records for status changes.

Viewing audits for fields

After setting up the auditing features in the system, you can view audits for fields or view audit records for status changes. View audits in order to monitor changes in attributes.

To view audits for fields:

- 1 Open any entity record.
- 2 Select the record for which to view the audit.
Note: You can only view audits on **Record View** or list detail pages.
- 3 Right-click within any field on the record, and then choose **Audit Trail**.
- 4 View the audit information.

Note: You can only view audit information if you have established audit control and changes have been made to the fields under audit.

Recorded in Mobile indicates when comments are updated or deleted in Mobile. The date and time reflect updates in Mobile.

- 5 Click **Close**.

Defining Flex business rules

Define Flex business rules or SQL statements to define validation rules that are specific to your organization. You can set up one or more statements to be processed for post-insert or post-update events.

Flex SQL processing supports data query (select) and data manipulation (insert, update, delete) statements. Use select statements to perform a check condition.

Uppercase and lowercase characters are allowed in the SQL statement. The row identifier token, however, must be either all uppercase or all lowercase (i.e., :ROWID or :rowid).

Every Flex SQL statement requires the use of a predefined :ROWID token. This token refers to the database row identifier for the record being processed in the specified table. The statement is executed for each record in the table affected by the insert or update operation.

The maximum statement length is 4000 characters. No statement termination character (;) is required.

Data manipulation statements are allowed, but make sure you do not begin an infinite cascading of trigger steps. For example, generally it is not recommended to create a Flex SQL statement that updates the base table identified in **Table**.

Note: Infor EAM recommends that you define Flex SQL procedures in close cooperation with your Infor EAM consultant.

To define Flex business rules:

- 1 Select **Administration > Setup > Flex Business Rules** form.
- 2 Click **New Record**.
- 3 Specify this information:

Table

Specify the database table.

Sequence Number

Specify the sequence number for the Flex SQL statement.

Trigger

Select one of the following options:

- **Post Insert**
- **Post Update**

SQL Statement

Specify the SQL statement for the selected database table.

Failure Message

Specify the failure message.

Comments

Specify comments regarding the Flex SQL statement.

- 4 Optionally, select the **Must Exist** checkbox if the Flex SQL statement must exist in the database table. If **Must Exist** is selected, SQL statements are run in order of Sequence Number. If one statement fails, the remainder do not run. If **Must Exist** is not selected, each statement runs separately.
- 5 Optionally, select the **Abort on Failure** to abort the statement upon failure. If **Abort on Failure** is checked, the **Failure Message** field value is returned, any remaining SQL statements are not processed, and the save that triggered the flex SQL is cancelled.
- 6 Optionally, select the **Reverse Return Code** checkbox to automatically reverse the returned value upon statement completion, i.e., Null becomes Not Null.
Reverse Return Code is used only with **Abort on Failure**.
- 7 Optionally, select the **Active** checkbox to set this Flex SQL statement record to active.
- 8 Click **Save Record**.

Note: Records flagged as **Mobile Only** cannot be deleted on this screen. You must delete them on the mobile device.

Click **Test Flex SQL** to check the validity of the SQL statement.

Setting up Messenger

Set up Messenger for Infor EAM. Utilize Messenger to notify users via e-mail of specific changes in database tables. First, define the installation parameters, and then create e-mail templates. Next, create e-mail notifications to alert users when certain events occur in the system database. Set up the system to send e-mails when certain conditions are met and to include specific parameters. Finally, view e-mails to ensure proper delivery.

Defining installation parameters for Messenger

To define installation parameters for Messenger:

- 1 Select **Administration > Security > Install Parameters**.
- 2 Specify this information:

Install Parameter

Query for the following installation parameters, and then define them according to the following examples and descriptions:

Installation Code	Example	Description
SMTPSEND	mailid@yourcompany.com	Enter the e-mail sender.
SMTPSERV	mail.yourcompany.com	Enter the e-mail server.

- 3 Click **Save Record**.

Creating e-mail templates for Messenger

Create and modify e-mail messages using e-mail templates.

To create e-mail templates for Messenger:

- 1 Select **Administration > E-mail Messenger > E-mail Templates**.
- 2 Click **New Record**.
- 3 Specify this information:

E-mail Template

Enter a unique code identifying the e-mail template, and then enter a description of the template in the adjacent field.

E-mail Recipients

Select the recipients of the e-mail message. Separate e-mail addresses with a space or a ;.

See "Selecting multiple recipients for e-mail notification" on page 53.

Note: Parameters can be used in **E-mail Recipients** as well. If a parameter is associated with a user or employee record, the system replaces it with the corresponding e-mail address when the e-mail is sent.

E-mail Subject

Enter the subject of the e-mail message.

E-mail Body

Compose the e-mail message. Identify the parameter number(s) that corresponds to the column of the system table to be displayed with this e-mail. Enter %1 - %15 for each parameter.

- 4 Click **Save Record**.

Selecting multiple recipients for e-mail notification

To select multiple recipients for e-mail notification:

- 1 Select **Administration > E-mail Messenger > E-mail Templates**.
- 2 Click **New Record**.
- 3 Specify this information:

E-mail Recipients

Select recipients from the list.

- 4 Click **OK**.

Creating e-mail notifications for Messenger

Set up e-mail notifications when certain events occur in the Infor EAM database. Create e-mail notifications for a defined table based on the e-mail template. Define the parameters and constraints of each e-mail notification.

To create e-mail notifications for Messenger:

- 1 Select **Administration > E-mail Messenger > E-mail Notification Setup**.
- 2 Enter the table for which to create the e-mail notification.
- 3 Click **Add E-mail Notification**.
- 4 Specify this information:

E-mail Template

Enter the e-mail template to send when this e-mail notification is activated. The system automatically populates the E-mail Template description and **Created By**.

Select one or more of the following events:

- **Update**
Select to send e-mail when the record is updated.
- **Insert**
Select to send e-mail when a record is inserted.
- **Delete**
Select to send e-mail when a record is deleted.

From Status

Enter any status for which to send an e-mail.

To Status

Enter the updated status for which to send an e-mail.

Active

Select to make the selected record active. The system may clear this checkbox if you add, modify, or delete parameters or conditions.

Include URL

Select to include the URL in the notification.

This checkbox is available only for the following tables:

Table Name	Description
R5ACTIVITIES	Work Order Activities
R5BLANKETORDERS	Blanket Orders
R5BLANKETORDLINES	Blanket Order Lines
R5BOOKEDHOURS	Booked Hours
R5CONTACTRECORDS	Customer Requests (Call Center)
R5EVENTS	Work Orders
R5INVOICEALLOCATIONS	Invoice Allocations
R5INVOICELINES	Invoice Voucher Lines
R5INVOICES	Invoice Vouchers
R5ORDERLINES	Purchase Order Lines
R5ORDERS	Purchase Orders
R5REQUISITIONS	Requisitions
R5REQUISLINES	Requisition Lines
R5SERVICEREQUESTS	Service Requests
R5WARCLAIMS	Warranty Claims

Comments

Enter any comments to include in the body of the e-mail notification.

- 5 Click **Submit**. The system automatically selects **Update** if either **From Status** or **To Status** is entered.

Purging e-mail records

To purge e-mail records:

- 1 Select **Administration > E-mail Messenger > E-mail Notification Setup**.
- 2 Enter the table for which to purge e-mail records, and then click **Purge E-mail Records**.
- 3 Specify this information:

From Date

Enter the date from which the e-mail records will be purged.

To Date

Enter the date up to which the e-mail records will be purged.

- 4 Click **Submit**.

Note: You can also purge e-mail records on the **E-mail Viewer** form.

- 5 Click **Close**.

Setting up e-mail notification parameters

Set up parameters to include in the body of the Messenger e-mail, e.g., a work order # %1[Work Order Number] was created on %2[Date Created] by %3[Entered by] for %4[Equipment Code/Name]. Create parameters for each of the data-specific items (items in brackets). The system retrieves the data based on the parameters and inserts it into the e-mail.

Parameters must also be set up in the template e-mail body.

See "Creating e-mail templates for Messenger" on page 52.

To set up e-mail notification parameters:

- 1 Select **Administration > E-mail Messenger > E-mail Notification Setup**.
- 2 Enter the table for which to set up e-mail notification parameters.
- 3 Select the record for which to set up parameters, and then click **Create Parameters**.
- 4 Click **Add Parameter**.
- 5 Specify this information:

Parameter

Enter the parameter number for the e-mail notification.

Note: The parameter must be in a range of 1 to 15.

Column

Enter the name of the column of the system table to be used when creating the e-mail content for the e-mail body.

6 Click **Submit**.

Note: The system clears **Active** on the associated E-mail Notification record.

7 Click **Close**.

Setting up e-mail notification conditions

Set up e-mail notifications to send e-mail whenever a specific condition is met.

To set up e-mail notification conditions:

- 1 Select **Administration > E-mail Messenger > E-mail Notification Setup**.
- 2 Enter the table for which to setup e-mail notification conditions.
- 3 Select the record for which to set up conditions, and then click **Create Conditions**.
- 4 Click **Add Condition**.
- 5 Specify this information:

Column

Enter the name of the column on the system table that applies to the e-mail notification.

Condition

Select the criteria for the e-mail notification.

See the following table when entering conditions for e-mail notifications:

Condition	Definition
Is equal to	Set this Condition if Column is equal to the value of Value 1.
Is not equal to	Set this Condition if Column is not equal to the value of Value 1.
Is greater than	Set this Condition if Column is greater than the value of Value 1.
Is less than	Set this Condition if Column is less than the value of Value 1.
Is greater than or equal to	Set this Condition if Column is greater than or equal to the value of Value 1.
Is less than or equal to	Set this Condition if Column is less than or equal to the value of Value 1.

Condition	Definition
Is blank	Set this Condition if Column is blank.
Is not blank	Set this Condition if Column is not blank.
Is between	Set this Condition if Column is between the values of Value 1 and Value 2.
Is not between	Set this Condition if Column is not between the values of Value 1 and Value 2.
Contains	Set this Condition if Column contains the value of Value 1.
Does not contain	Set this Condition if Column does not contain the value of Value 1.

Value 1**Value 2**

Enter the value of the e-mail notification condition.

Enter values according to the following formats:

Date

To_date ('23-OCT-2003','DD-MON-YYYY'). For example, if you are entering a date value for a condition that is equal to a specific date, enter the value according to this exact format:

Column	Condition	Value 1
Name of column	Is equal to	To_date ('23-OCT-2003','DD-MON-YYYY')

Numbers

To_Number (10). For example, if you are entering a number value for a condition that is greater than a specific number, enter the value according to this exact format:

Column	Condition	Value 1
Name of column	Is greater than	To_number (10)

- **Characters**
'engine'
- **Contains**
'%pump%'

Note: You must enter a **Value 1**. The system protects both **Value 1** and **Value 2** if you enter "is blank" or "is not blank" in Condition. **Value 2** is required if you enter "is between" or "is not between" in Condition.

If you update Column or Condition after you enter Value 1 or Value 2, the system clears both of the value fields.

6 Click **Submit**.

Note: The system clears Active on the associated E-mail Notification record.

7 Click **Close**.

Viewing initiated e-mails for Messenger

View records of all e-mails that have been initiated from database events to ensure proper delivery and to troubleshoot problems with Messenger. The system displays all sent messages including those that encountered error messages.

To view initiated e-mails for Messenger:

1 Select **Administration > E-mail Messenger > E-mail Viewer**.

2 Select the record for which to view the initiated e-mail.

3 View the following information regarding the e-mail record:

- **Date**
The system displays the date the e-mail was initiated.
- **E-mail Record**
The system displays a code identifying the e-mail record.
- **E-mail Template**
The system displays the e-mail template.
- **E-mail Recipients**
The system displays the list of e-mail recipients.
- **Error**
Indicates that an error occurred while sending the e-mail.
- **Sent**
Indicates that the system successfully sent the e-mail.
- **E-mail Body**
The system displays the composed message.
- **Error Message**
The system displays the error that the e-mail message encountered.

Managing alerts

Create e-mail and work order alerts to notify users when data in Infor EAM (e.g. equipment) does not meet a specified criteria. First, create a grid to query data in the system and then use alert management to determine if the results need to be measured against a min/max setting or if the results alone will trigger an email and/or work order.

An alert management record can be created to monitor readings that are being imported into Infor EAM for chillers. The alert record may monitor to see if the difference between supply air temperature and the return air temperature is >22 degrees when chilled water temperature is <46 degrees and chilled water valve is open >50%. If all this criteria is met for a chiller then a work order would be created indicating that a belt could be slipping or the filters may be plugged.

Note: Use the new R5ALERTDATAOBJ table to import records into Infor EAM. Then use alert management to analyze the records and create alerts when deviations occur. R5ALERTDATAOBJ was specifically designed for analyzing data imported from another system related to Infor EAM equipment records. This table can be accessed through web services or using the Infor EAM Import Utility. Once records are created in R5ALERTDATAOBJ, use this table in Grid Designer when creating the alert management grid query.

Create an active alert management grid on the Grid Designer page before setting up an alert on the Alerts page.

See "Defining grids" on page 137.

Creating alerts

To create e-mail and work order alerts for specific equipment:

- 1 Select **Administration > Setup > Alert Management**.
- 2 Click **New Record**.
- 3 Enter a description for the alert.

Active

Select to set this alert to active.

- 4 Specify this Alert Definition Details information:

Grid Name

Enter the grid name defined for the **Alerts** form on the **Grid Designer** form.

The system automatically populates the grid description and **Grid Active**.

Datasp

Select the Datasp for the grid.

Exception Entity

Enter the exception entity.

Grid Key Field 1

Enter the mapping to the corresponding grid column that should be used as a key field in the grid, e.g., if analyzing equipment this would map to the equipment column in the grid. The system automatically populates the grid key field 1 description.

Grid Key Field 2

Enter the mapping to the corresponding grid column that should be used as a key field in the grid, e.g., if analyzing equipment this would map to the equipment column in the grid. The system automatically populates the grid key field 2 description.

Note: Grid key fields are populated on the History page, and used for reviewing data when a delay period is entered for an alert on the Work Order Alerts, Exceptions, or E-mail Alerts pages.

5 Specify this Min/Max Definition information:

Use Min/Max

Select to use a minimum and maximum range for this alert.

Min/Max Value Field

Enter the mapping to the corresponding grid column. During the alert process the system analyzes the result of the field for each row in the grid and compares it to the min/max selections on the form.

Min Value

Enter the minimum value for the alert. The system produces alerts when the result of **Min/Max Value Field** is less than or equal to the minimum value.

Max Value

Enter the maximum value for the alert. The system produces alerts when the result of **Min/Max Value Field** is greater than or equal to the maximum value.

Trigger within Min/Max Values

Select to trigger alerts when the result value is within the **Min Value** and **Max Value**.

Note: Triggering within min/max will generate alerts when the result has values equal to or greater than the **Min Value** and less than or equal to the **Max Value**.

Enter the user-defined fields.

6 Specify this Scheduling information:

Frequency

Enter the frequency of the analysis in a numerical amount, and then select the frequency UOM, e.g., enter 10 and then select **Days** to enable the system to perform an analysis every 10 days.

Note: Although the analysis may process every 10 days, the system does not generate alerts unless the analysis meets the specified criteria.

Next Evaluation Date

Enter the next date to evaluate the alert. The system automatically populates **Last Evaluation Date** and **Last Alert Date**.

7 Specify this Active Alert Types information:

Work Order

Select to create a work order alert based on specific parameters.

See "Creating e-mail alerts" on page 64.

E-mail

Select to create an e-mail alert based on specific parameters.

See "Creating e-mail alerts" on page 64.

- 8 Click **Save Record**. The system automatically populates **Alert**, **Created By**, and **Date Created**.

Note: To preview the grid query results, click **Preview Grid**.

To activate alert management, enable the ALRT driver on the **Job Setup** form.

Defining before SQL statements for alerts

Define SQL statements that the system will execute prior to executing the defined grid for an alert. Before SQL statements can be used to prepare data or structures being used by the grid, e.g., purge records.

To define before SQL statements for alerts:

- 1 Select **Administration > Setup > Alert Management**.
- 2 Select the alert for which to define the before SQL statement, and then click the **Before SQL** tab.
- 3 Specify this information:

SQL Statement

Enter the SQL statement that will be executed before the grid query will produce a result set. The system automatically populates **Abort on Failure**.

Note: Unselect **Abort on Failure** to enable the system to continue executing the grid query if the SQL statement fails.

Comments

Enter comments regarding the SQL statement.

Execute when Previewing Grid

Select to execute the SQL statement when **Grid Preview** is selected.

Active

Select to set this SQL statement record to active.

Note: To process the before SQL statement when the alert job is run or **Grid Preview** is selected on the **Record View** page of the **Alerts** form, you must select **Active**.

- 4 Click **Save Record**.

Note: Click **Test SQL** to check the validity of the SQL statement.

Previewing grids for alerts

Preview the grid for alerts. The system does not always display the number of alerts the system creates once the alert management process is run. The system must consider if the alert is using min/max evaluation and delays in order to get the correct number of alerts to generate. For example, previewing the grid may show temperature records for many pieces of equipment, but some may not meet the criteria set up in **Min Value** or **Max Value**. Also, some equipment may have a delay period in which you do not want to create additional work orders or e-mails for equipment continuing to meet a threshold.

To preview grids for alerts:

- 1 Select **Administration > Setup > Alert Management**.
- 2 Select the alert for which to preview the grid, and then click the **Record View** tab.
- 3 Click **Preview Grid**.
- 4 View the results.
- 5 Click **Close**.

Note: To set the **Next Evaluation Date** for the alert, click **Schedule Now**.

Defining after SQL statements for alerts

Define SQL statements for system to execute after executing the defined grid query and after creating e-mail and work order alerts.

To define after SQL statement for alerts:

- 1 Select **Administration > Setup > Alert Management**.
- 2 Select the alert for which to define the after SQL statement, and then click the **After SQL** tab.
- 3 Specify this information:

SQL Statement

Enter the SQL statement that will be executed after the grid query and alerts.

Comments

Enter comments regarding the SQL statement.

Execute when Previewing Grid

Select to execute the SQL statement when **Grid Preview** is selected.

Active

Select to set this SQL statement record to active. The system processes the after SQL statement after the grid query is processed.

Note: To process the after SQL statement when the alert job is run or **Grid Preview** is selected on the **Record View** page of the **Alerts** form, you must select **Active**.

- 4 Click **Save**.

Note: Click **Test SQL** to check the validity of the SQL statement.

Creating work order alerts

Define a work order alert to create work orders systematically based on a grid query.

Note: **Work Order** must be selected on the **Record View** tab of the Alerts page for an alert before the system will examine the **Work Order Alerts** page during the alert management process.

Note: The alert management process uses R5 User ID to create work orders. R5 must have rights to all organizations required to create work orders from alert management.

To create work order alerts:

- 1 Select **Administration > System Configuration > Alert Management**.
- 2 Select the alert for which to create a work order alert, and then click the **Work Order Alerts** tab.
- 3 Specify this information:

Delay Between Alerts

Specify the numerical amount of time between work order alerts for a specific grid key, and then select the delay UOM, or unit of time to delay between alerts, e.g., enter 2 and then select Hours to allow 2 hour delays between the work order alerts.

Note: When the system analyzes delay periods, it uses **Grid Key Field 1** and **Grid Key Field 2** on the **Record View** and **History** tabs of the Alerts page to determine if a grid result will get the delay specified. If it is determined that a grid result will get the delay, then the system does not produce the alert if the time between the last alert and the current time is within the delay criteria.

Standard WO

Specify the standard work order to associate to the work order alert. The system uses the standard work order as a template when creating the work order.

Work Order Org.

Specify the organization to which the work order created will belong.

Equipment Field

Specify the grid column that represents the equipment field.

Equipment Org. Field

Specify the grid column that represents the equipment organization.

Description

Specify the description that will be on the work order when the work order is generated. If no value is entered the system uses the standard work order value.

Due Nonconformities Only

Select to include only new observations created for nonconformities that are due for inspection.

Note: The inspector will not see nonconformities on the work order that are present but not due for inspection. The inspector may be confused if he finds such nonconformities during the inspection that were not on the list, which may lead to duplicate nonconformities

Include Nonconformities

Select to include new observations for re-inspection for existing nonconformities.

- 4 Specify comments to display on the work order when the work order is generated.
- 5 Click **Save Record**.

Note: To create parameters for work order alerts, click **Create Parameters**. These parameters can be used to help build a user-friendly description and/or comment when the work order is generated by setting parameters that represent actual values in the grid results.

See "Creating parameters for alerts" on page 65.

To associate additional work order fields to grid fields, click **Additional Field Mapping**.

See "Mapping additional fields for work order alerts" on page 64.

Mapping additional fields for work order alerts

Associate work order fields to grid fields to create mappings used by the alert for creating work orders.

To map additional fields for work order alerts:

- 1 Select **Administration > System Configuration > Alert Management**.
- 2 Select the alert for which to map additional fields for a work order alert, and then click the **Work Order Alerts** tab.
- 3 Click **Additional Field Mapping**.
- 4 Click **Add Mapping**.
- 5 Specify this information:

Work Order Field

Specify the work order field to populate, e.g., Standard WO, Department, or Warranty.

Grid Field

Specify the grid field to map to the work order field.

- 6 Click **Submit**.
- 7 Click **Close**.

Creating e-mail alerts

Define alerts to trigger e-mails when records are identified that cause an alert.

To create e-mail alerts:

- 1 Select **Administration > Setup > Alert Management**.

2 Select the alert for which to create an e-mail alert, and then click the **E-mail Alerts** tab.

3 Click **Add Record**.

4 Specify this information:

E-mail Template

Enter the e-mail template to send.

Delay Between Alerts

Enter the numerical amount of time between e-mail alerts for a specific grid key, and then select the delay UOM, or unit of time to delay between alerts, e.g., enter 2 and then select Hours to allow 2 hour delays between the e-mail alerts.

Note: When the system analyzes delay periods, it uses **Grid Key Field 1** and **Grid Key Field 2** on the **Record View and History** pages of the **Alerts** form to determine if a grid result will get the delay specified. If it is determined that a grid result will get the delay, then the system does not produce the alert if the time between the last alert and the current time is within the delay criteria.

5 Click **Submit**.

Note: See "Creating parameters for alerts" on page 65.

Users may create multiple e-mail alerts for a single alert management record. The system sends multiple e-mails for each grid result meeting the specified alert criteria.

To activate e-mail alerts, enable the MAIL driver on the **Job Setup** form, and then enter the correct values for the e-mail install parameters.

See "Setting up Messenger" on page 52.

Creating parameters for alerts

Create parameters or standard messages for use in substituting values in large text areas such as in the e-mail message, work order descriptions, and work order comments. By creating standard messages, the system defaults these messages in the body of the e-mail message, description, or comments.

Example: For an e-mail alert notification the text may read: "HVAC-ROOFTOP-01 has a temperature of 250 degrees. Please check this equipment by 01/15/2008." To prevent the necessity of entering the same information repeatedly, create parameters that allow the system to default the same message for the data-specific items to be pulled from the grid. For the example above, you would enter for the body of the e-mail: "%1 has a temperature of %2 degrees. Please check this equipment by %3."

To create parameters for alerts:

1 Select **Administration > Setup > Alert Management**.

2 Create an alert.

See "Creating alerts" on page 59 on the **Work Order Alerts** or **E-mail Alerts** page, and then click **Create Parameters**.

Note: You may also access this popup by clicking **Create Parameter**.

3 Click **Add Parameter**.

4 Specify this information:

Parameter

Specify the text to be displayed in the text areas of the e-mail message or comments. Enter % for parameters and the number of the parameter that is to be used.

Recipient

Select to include the recipient.

Note: **Recipient** is not displayed when the Create Parameters popup is invoked from the **Work Order Alerts** page.

Grid Field

Specify the grid column that represents the value you wish to substitute into the field.

Value

Specify the hard-coded value to substitute into the field.

5 Click **Submit**.

Note: When you select **Recipient**, the system takes the resulting grid field value or hard-coded value and lookup to the Infor EAM user table and then the personnel table and searches for a corresponding record. The system then takes the e-mail addresses associated with that record and uses it where the parameter is located in the e-mail template. The system assumes you will enter the actual % parameter in the recipient line of the e-mail template.

Defining exceptions for alerts

Define exceptions to the alert criteria. Enter the specific records that will have different alert criteria than all of the other records to be analyzed by the grid query.

To define exceptions for alerts:

- 1** Select **Administration > Setup > Alert Management**.
- 2** Select the alert for which to create an exception, and then click the **Exceptions** tab.
- 3** Click **Add Record**.
- 4** Specify this information:

Grid Key 1

Enter the actual value expected in the grid result for which to define exceptions.

Note: This LOV is defined by Exception Entity on the Record View page.

You may make your own key fields without using system entity values.

Grid Key 2

Enter the actual values expected in the grid result for which to define exceptions.

Note: The actual values from the grid result for **Grid Key 1** and **Grid Key 2** should be used in the columns that are mapped to Grid Key Field 1 and Grid Key Field 2 on the Record View page, e.g., equipment and equipment organization would be mapped on the Record View page, and then on

the Exceptions page the values of HVAC-ROOFTOP-01 and ATLANTA would display for the actual values for which to set up exceptions.

Delay Between Alerts

Enter the numerical amount of time between alerts for a specific grid key value, and then select the delay UOM, or unit of time to delay between alerts, e.g., enter 2 and then select **Hours** to allow 2 hour delays between the alerts.

Note: This delay overrides both delays for work order alerts and e-mail alerts for the **Grid Key 1** value specified.

Trigger within Min/Max Values

Select to trigger alerts when the result value is within the **Min Value** and **Max Value**.

Min Value

Enter the minimum value for **Grid Key Field 1**. The system produces alerts when the result of Min/Max Value is less than or equal to the minimum value.

Max Value

Enter the maximum value for **Max Value**. The system produces alerts when the result of Min/Max Value is greater than or equal to the maximum value.

5 Click **Submit**.

Note: The system overrides any data in **Min Value** or **Max Value** specified on the **Record View** page of the **Alerts** form for the **Grid Key 1** value specified.

If **Use Min/Max** is not selected on the **Record View** page, the system ignores the min/max data specified on the **Exceptions** page.

Viewing alert history

View the failure and success records for an alert.

To view alert history:

- 1** Open the **Administration > Setup > Alert Management**.
- 2** Select the alert for which to view history, and then click the **History** tab.
- 3** View the history.

Note: For work order type history records, double-click the history record to hyperlink to the **Work Orders** form. View the information, and then click **Close** or **Return** to close the **Work Orders** form and return to the **History** page.

Creating region codes

Create and update region codes for tracking degree days.

To create and edit region codes:

- 1 Select **Administration > Setup > Regions**.
- 2 Click **New Record**.
- 3 Specify this information:

Region Description

Enter a unique description for the region.

Postal Code

Enter the postal code for the specific region.

Region

Enter a name for the new region.

Organization

Select an organization for the region.

Class

Select a class for the region.

Out of Service

Select to designate this region as out of service.

Degree Day Reference Point

Enter a value for the degree day reference point.

Actual Temperatures Source

Select the source which supplies the actual temperature data, e.g., **National Climatic Data Center** or **World Weather Online**.

Actual Temperatures URL

Enter the URL for the **Actual Temperature Source**.

Fahrenheit

Select to designate Fahrenheit as the default unit of measure for degree day data.

Celsius

Select to designate Celsius as the default unit of measure for degree day data.

- 4 Click **Save Record**.

Recording actual temperatures for regions

Record actual temperature data for heating degree days and cooling degree days for each day of the year.

To record actual temperatures:

- 1 Select **Administration > Setup > Regions**.
- 2 Select the region for which to record actual temperatures, and then click the **Actual Temperatures** tab.
- 3 Click **Add Actual Temperature**.
- 4 Specify this information:

Date

Enter the date for which to record actual temperatures. The system automatically populates **Day of Year**, **Month**, **Day**, and **Year**.

Temperature Minimum

Enter the minimum temperature for which to record actual temperature data.

Temperature Maximum

Enter the maximum temperature for which to record actual temperature data.

Note: The system re-calculates and automatically populates **Temperature Average**, **Heating Degree Days**, and **Cooling Degree Days**.

- 5 Click **Submit**.

Note: To delete actual temperature data for a specific date, select the actual temperature record for which to delete, and then click **Delete Actual Temperature**.

To purge actual temperature records to a specific date, click **Purge Actual Temperature Records**.

To get actual temperature for specific dates, click **Get Actual Temperatures**.

Updating historical temperatures for regions

Update historical data for heating degree days and cooling degree days for each day of the year.

To update historical temperatures for regions:

- 1 Select **Administration > Setup > Regions**.
- 2 Select a region code for which to update historical temperatures, and then click the **Historical Temperatures** tab. The system automatically populates **Temperature Average**, **Day of Year**, **Month**, and **Day**.
- 3 Specify this information:

Temperature Minimum

Enter the new minimum temperature.

Temperature Maximum

Enter the new maximum temperature. The system re-calculates and automatically populates **Temperature Average**, **Heating Degree Days**, and **Cooling Degree Days**.

- 4 Click **Submit**.

Getting actual temperatures for regions

Get actual temperatures for regions from a weather source such as the National Climatic Data Center or World Weather Online.

Note: To get actual temperatures, **Actual Temperatures Source** and **Actual Temperatures URL** both must be entered on the **Record View** of the region.

To get actual temperatures for regions:

- 1 Select **Administration > Setup > Regions**.
- 2 Select the region for which to get actual temperatures, and then click the **Actual Temperatures** tab.
- 3 Click **Get Actual Temperatures**.
- 4 Specify this information:

Get Temperatures From

Enter the first date for which to get actual temperatures.

Get Temperatures To

Enter the last date for which to get actual temperatures.

- 5 Click **Submit**.
- 6 Click **Close**.

Purging actual temperature records for regions

Purge actual temperature records to a specific date.

To purge actual temperature records for regions:

- 1 Select **Administration > Setup > Regions**.
- 2 Select the region for which to purge actual temperatures, and then click the **Actual Temperatures** tab.
- 3 Click **Purge Actual Temperature Records**.
- 4 Specify this information:

Up To Date

Enter the date for which to purge the system of all records up to and including this date.

- 5 Click **Submit**.

Printing temperature analysis chart

Before you can set the parameters to generate the temperature analysis chart, you must enter **Temperature Minimum** and **Temperature Maximum** on the **Actual Temperatures** and **Historical Temperatures** tabs.

To print temperature analysis chart:

- 1 Select **Administration > Setup > Regions**.
- 2 Select the region for which to generate the temperature analysis chart, and then click the **Temperature Analysis Chart** tab.
- 3 Specify this information:

Start Date

Specify the starting date for which to retrieve data.

End Date

Specify the ending date for which to retrieve data.

- 4 Click **Submit**.
- 5 Click **Print**.

Configuring Infor EAM to generate Oracle Forms reports

Configure Infor EAM to run reports that are in the Oracle Forms version of the product, e.g., the Print work order cards report (WRJOB). See Chapter 15 Module Reports of the *Infor EAM Oracle Forms Installation & Upgrade Guide* for more information about the reports that are available in the Oracle Forms version of the product.

Note: You can only configure Infor EAM to generate Oracle Forms reports if you have installed, configured, and are running both Infor EAM and the Oracle Forms version of the product.

Creating report organization structures

Create an organizational tree-structure to roll up reporting on performance statistics, energy consumption, and resource utilization. Define an organizational structure by which you control the roll-up of energy consumption. For example, the reporting structure might roll up like this:

Operational Area > Facility > Campus > State > Country > Continent > Worldwide

To create a report organization structure:

- 1 Select **Administration > Setup > Report Organization Structure**.
- 2 Click **Add Top Level Organization**.
- 3 Specify this information:

Organization

Enter the organization to designate as the top level organization of the structure. Available Organizations are shown in the right-hand pane.

- 4 Drag and drop desired organizations to the Report Organization Structure on the left-hand pane under the Top Level Organization previously selected.

Creating the Oracle Forms report configuration for Infor EAM

To create the Oracle Forms report configuration for Infor EAM:

- 1 Locate the [ORACLEHOME]\forms\server directory.

Note: The directory path follows Windows style notation; however, if you are using UNIX, the file path follows the same directory structure with UNIX style notation.

- 2 Open the formsweb.cfg file in a text editor.
- 3 Create a baseHTMLjinitiator parameter that includes the value of the base Java Initiator page according to the following example:

```
[d7irep]
envfile=D7i.env
baseHTMLjinitiator=7irep.htm
```

- 4 Save and exit the file.

Setting up enterprise searches

An enterprise search allows the capability to search across an entire system of database table records or repositories. Define the search criteria for the enterprise search lookup capability across the system by first creating interest centers.

Interest Centers are categories by which to group the search results of the repositories in the Enterprise Search popup or on the **Repositories** tab.

To set up an enterprise search:

- 1 Select **Administration > Enterprise Search Setup**.
- 2 Specify a description of the interest center.
- 3 Specify this information:

Interest Center Category

Specify a category for the interest center, e.g., if you specify **Work Module** as a category, the search results on the **Repositories** tab will include work order activities, work order parts, service requests, work orders, employees, employee availability, and other records associated with the work module.

- 4 Click **Save Record**.
An **Interest Center Code** is assigned.

Setting up repositories for enterprise searches

A repository is a structured location for system data storage. It is used to map a table, user function, or tab records from which to search during an enterprise system search. Repositories are grouped by interest centers on the **Record View** tab.

To set up a repository for an enterprise search:

- 1 Select **Administration > Enterprise Search Setup**.
- 2 Select the interest center for which to set up a repository, and then click the **Repositories** tab.
- 3 Click **Add Repository**.
- 4 Specify this information:

Repository

Specify a name for the repository, and then enter a description of the repository.

Table Name

Specify the table name for the repository.

User Function

Specify the user function for the repository.

Tab

Specify the tab for the repository.

Thumbnail

Specify a URL location for the thumbnail.

- 5 Select the **Out of Service** check box to exclude the repository records from the enterprise search.
- 6 Click **Submit**.

Defining repository columns for enterprise searches

A repository column contains the fields, layout, and sort order of the repository to be used in an enterprise search.

To define a repository column for an enterprise search:

- 1 Select **Administration > Enterprise Search Setup**.
- 2 Select the interest center for which to define repository columns, and then click the **Repository Columns** tab.
- 3 Select the repository for which to define columns, and then click **Add Column**.
- 4 Specify this information:

Column Name

Specify the column name.

Display Order

Specify the order in which the column will display in the repository table.

Alias

Specify an alias for the column.

Facet

Specify a facet to categorize the column name. Multiple column names can have the same facet.

- 5 Click **Submit**.

Generating enterprise search definitions

Use this screen to generate repositories and their associated interest centers. Export the repositories and interest centers that you set up on the Enterprise Search Setup screen. Once you export the items, upload the zip file to the Infor Enterprise Search.

- 1 Select **Administration > Enterprise Search Setup > Generate Enterprise Search Definitions**.
- 2 Select the repository records to export, and then click **Download**.
- 3 Use the Infor IES tool to upload the definitions.zip file to EAM. Browse to https://<ies_install_server>.infor.com:21000/ies/admin.

Customizing extensible framework

Add business-specific functionality to existing screens/tabs in the product by creating custom JavaScript files.

To customize extensible framework:

- 1 Select **Administration > Screen Configuration > Extensible Framework**.

2 Specify this information:

Name

Specify a unique name to identify the screen customization.

Screen

Specify the user function mnemonic code of the screen to customize.

3 Specify the **Source** code to customize the screen.

4 Select the **Active** check box to execute the JavaScript changes to the screen in EAM.

5 Click **Save Record**. Navigate to the screen to view the changes.

Define users and users groups to ensure limited, password-controlled access to the system. Increase screen-level security using interface permissions and Work Order authorization permissions.

Note: This chapter describes Infor EAM functions that only a system administrator has rights to perform.

Implementing multi-organization security (MOS)

Multi-organization security (MOS) is a feature that allows the system administrator to set up separate, secured, logical databases within the organization. There is one logical database for each organization; however, there is still one physical system database. To activate MOS, you must set the MULTIORG installation parameter to YES.

See "Defining Installation Parameters" on page 15.

After activating MOS, you cannot deactivate it. Depending on the type of security set up, the system does not allow users to view or influence data from organizations to which they do not belong.

With MOS, the system becomes more user-driven, rather than user-group driven, making it possible for users to have different roles. Associate users with more than one organization and establish a default organization for that user. The system automatically displays the user's default organization at login, which can be changed to any organization to which the user has access. To switch organizations after login, simply log out and log back in as the new organization. After logging in to a specific organization, users can view and influence data specific to all the organizations to which they have access and all information defined as "common," which is information accessible across all organizations and users.

When inserting new records, the system automatically associates the record to the organization of the current login session; however, users can change the organization to any organization to which they have access.

MOS replaces facility security. Therefore, if you do not use MOS, the system does not display **Organization** on any forms.

Note: MOS affects many system functions, and some sections in the user documentation apply only to MOS.

Defining organizations

Define organizations within your enterprise. You can also edit organizations as necessary.

To define organizations:

- 1 Select **Administration > Security > Organizations**.
- 2 Click **New Record**.

Note: You cannot insert a new organization record if you have multi-organization security set to NO.

- 3 Specify this information:

Organization

Specify a code identifying the organization, and then enter a description of the organization in the adjacent field.

Currency

Specify the currency to attach to the organization.

DUNS Number

Specify your organization's DUNS number. A DUNS number is a unique nine-digit sequence used as the universal standard for identifying and tracking businesses worldwide.

Set of Books Name

Specify the name for your general ledger books.

Choose one of the following options for invoice matching:

- **Match Tolerance Absolute**

Specify the absolute amount allowed as the difference between the purchase order line cost and the invoice line cost when matching line costs. If no value is specified, the system automatically sets the value to 0.

- **Match Tolerance %**

Specify the percentage allowed as the difference between the purchase order line cost and the invoice line cost when matching cost lines. If no value is specified, the system automatically sets the value to 0.

- **Match Quantity Tolerance %**

Specify the percentage allowed as the difference between the purchase order line quantity and the invoice line quantity when matching line quantities. If no value is specified, the system automatically sets the value to 0.

Locale

Select the number format to use based on the geographic location of your organization/enterprise. Selecting a locale determines the manner in which commas and decimals are used in numeric data. The setting of the LOCALE installation parameter determines the default locale for all users. However, selecting a locale at the organization level overrides the setting of the LOCALE installation parameter of the logged in user.

Code Reference

Specify the code identifying the code reference for the organization.

Server Time Offset

Specify the number of hours difference between the system server and your local time if the system server is in a different time zone.

Account Segment Value

Specify the general ledger account code segment that represents the organization in your accounting structure. See your chart of accounts for more information.

Accounting Entity

Specify an accounting entity for the organization.

Depreciation Type

Select the depreciation type for assets within the organization. **Depreciation Type** is automatically based on the setting of the ASDEPTYP installation parameter. However, selecting a depreciation method at the organization level overrides the setting of the ASDEPTYP installation parameter.

Common

Select to indicate that the organization is common, that is the system shares information defined for this organization among all organizations.

Note: After defining an organization as common, you cannot change it to be a specific organization. You cannot delete common organizations.

Calendar Group

Specify the calendar group of the organization to determine periods of availability for associated equipment.

- 4 Click **Save Record**.

Adding enterprise locations to organizations

Add, change, or delete enterprise locations on the organizations screen.

To add enterprise locations:

- 1 Select **Administration > Security > Organizations**.
- 2 Select an organization to which to add an enterprise location, and then click the **Enterprise Locations** tab.
- 3 Click **Add Enterprise Location**.
- 4 Specify this information:

BOD Group

Select a BOD Group from the list.

Enterprise Location

Enter a unique name identifying the enterprise location.

- 5 Click **Submit**.

Adding options for organizations

Enter, update, and delete parameter option values at the organization level.

For a comprehensive list of organization options, see "Organization options" on page 257.

To add options to organizations:

- 1 Select **Administration > Security > Organizations**.
- 2 Select the organization for which to add options, and then click the **Options** tab.
- 3 Click **Add Option**.
- 4 Specify this information:

Option

Specify the option to specify for the organization.

Description

Specify a description of the option.

Value

Specify the value of the option, e.g., **S**.

- 5 Click **Submit**.

Defining fiscal years for asset depreciation

Create fiscal years to indicate the fiscal periods on which to base asset depreciation. When defining fiscal years for an organization, you cannot create any gaps or overlaps between fiscal year periods.

After defining fiscal years, you can update them as necessary. However, updating an existing fiscal year can invalidate records associated with equipment for which unit of output is the depreciation method.

See the *Infor EAM User Guide*.

To define fiscal years for asset depreciation:

- 1 Select **Administration > Security > Organizations**.
- 2 Select the record for which to define fiscal years, and then click the **Fiscal Years** tab.
- 3 Click **Add Fiscal Year**.
- 4 Specify this information:

Start Date

Enter the date on which the fiscal year begins.

End Date

Enter the date on which the fiscal year ends.

5 Click Submit.

Note: To delete a fiscal year, select the fiscal year to delete, and then click **Delete Fiscal Year**.

Deleting an existing fiscal year deletes records associated with equipment for which unit of output is the depreciation method.

To recalculate depreciation details for the equipment, click **Recalculate Depreciation Details**.

Activating multi-organization security

Using multi-organization security (MOS), establish record-level security for system forms depending on the organization of the record. To utilize record-level security for a form, first activate MOS capability for the entity associated with each function.

Example:

The system user "John" is associated with Infor EAM user group 1 and Infor EAM user group 2. User group 1 is associated with Organization 1 and User group 2 is associated with Organization 2. User group 1 has full access rights to the Equipment form; User group 2 has query-only rights to the Equipment form. When the system user "John" opens the Equipment form and queries for an equipment record, the system displays only records having organizations to which John has access, and each record retains the permissions of the organization associated with the equipment. Therefore, if the organization of the equipment is Organization 1, John will have full access rights to the record. However, if the organization is Organization 2, John can only view the record.

Note: You cannot establish record-level security for the equipment unless the MULTIORG installation parameter is set to YES.

See "Defining installation parameters" on page 15.

To activate multi-organization security:

- 1 Select **Administration > Security > Multi-org Security**.
- 2 Select the entity for which to activate multi-organization security, and then click the Multi-org check box.

Note: After activating an entity for MOS, it cannot be deactivated.

You can select additional Multi-org check boxes to activate multi-organization security for multiple entities.

- 3 Click **Save Record**.

Setting up user groups

Set up user groups so that people who perform similar tasks within the organization have the same privileges. In the system, you can copy the header and child information from one user group to another. You can also edit user groups as necessary.

The system is automatically configured with the R5 user group, which contains one user. The R5 user group has full access to all functions, including data setups, system setups, and system administration setups. After installing Infor EAM, change the user password immediately. Only the system administrator should have access to this user.

Note: After setting up users within a user group, the system administrator cannot delete the group. To delete a group, all associated records must be deleted first. Infor strongly discourages using the predefined R5 user group as a default user group because menus and authorizations of this group might be replaced during system upgrades.

Creating user groups

To create user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Click **New Record**.
- 3 Specify this information:

User Group

Enter a unique code identifying the user group, and then enter a brief description of the user group in the adjacent field.

Class

Enter a class code for the user group. The system automatically populates **Class Org**.

Infor EAM Requestor

Select to indicate that this user group performs Infor EAM Requestor functions.

Note: The Requestor user group may only submit work requests and/or purchase requests.

When you change the value of the Requestor checkbox, the system clears **Copy From**.

Copy From

Enter, from the list of previously defined groups, the ID of the group from which to copy menus, permissions, and status authorizations to the user group.

Note: For user groups that need extensive system privileges, enter the R5 user group, and then turn off the unnecessary permissions.

If you do not enter a user group, the system automatically copies menus, permissions, and status authorizations from the R5 user group.

Default WO Type

Enter the default work order type for the user group. The system automatically assigns the selected type as the default work order type for the user group on various forms within the system.

Department

Enter a default department for the user group.

Session Timeout (minutes)

Enter the amount of time in minutes in which the system will timeout.

Corrections Allowed

Select to allow users to make corrective hour bookings in the work management module.

- 4 Click **Save Record**.

Viewing users

After setting up new system user groups, view the users that are associated with user groups on the **User Groups** form.

To view users:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to view users, and then click the **Users** tab.
- 3 View the user information.

Granting interface permissions to user groups

Specify the functions to which user groups have access and specify the permission levels for each function.

To grant interface permissions to user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to grant interface permissions, and then click the **Interface Permissions** tab.
- 3 Click **Add Permission**.
- 4 Specify this information:

Function

Enter the function to set up for this user group. The system automatically populates the function description.

Select one or more of the following options to determine the level of interface permissions for the user group:

- **Query**

Select to allow users to retrieve records.

- **Update**

Select to allow users to update records. Users must have query permission to update records.

- **Insert**

Select to allow users to insert new records.

- **Delete**

Select to allow users to delete records. Users must have query permission to delete records.

Note: When you unselect **Query**, the system automatically unselects **Update** and **Delete**.

When you select either **Update** or **Delete**, the system automatically selects **Query**.

5 Click **Submit**.

Adding inboxes to user groups

To add inboxes to a user group:

1 Select **Administration > Security > User Groups**.

2 Select the user group for which to add an inbox, and then click the **Inbox** tab.

3 Click **Add Inbox**.

4 Specify this information:

Inbox

Enter the inbox name. The system automatically populates the inbox description.

5 Click **Submit**.

Adding KPIs to user groups

To add KPIs to user groups:

1 Select **Administration > Security > User Groups**.

2 Select the user group for which to add a KPI, and then click the **KPI** tab.

3 Click **Add KPI**.

4 Specify this information:

KPI

Enter the KPI name. The system automatically populates the KPI description.

5 Click **Submit**.

Adding charts to user groups

To add charts to user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to add a chart, and then click the **Charts** tab.
- 3 Click **Add Chart**.
- 4 Specify this information:

Chart

Enter the chart to add to the user group. The system automatically populates the chart description.

- 5 Click **Submit**.

Granting work order authorization permissions to user groups

Specify the web services to which user groups have access and specify the permission levels for each web service.

Note: You only need to grant work order authorization permission to user groups if the JTAUTH installation parameter is set to YES.

To grant work order authorization permissions to user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to grant work order permissions, and then click the **WO Authorizations** tab.
- 3 Click **Add Authorization**.
- 4 Specify this information:

WO Type

Select the work order type for which to grant permissions.

Select one or more of the following options to determine the level of work order permissions for the user group:

- **Insert**
Select to allow users to insert new work order records of this type.
- **Update**
Select to allow users to update work order records of this type. Users must have query permission to update records.
- **Delete**
Select to allow users to delete work order records of this type. Users must have query permission to delete records.

- 5 Click **Submit**.

Granting store transaction permissions to user groups

Grant permissions for user groups to perform store transactions such as issuing and returning parts, transferring parts to stores, inserting physical inventory transactions, and updating stock records for parts.

To grant store transaction permissions to user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to grant store transaction permissions, and then click the **Store Security** tab.
- 3 Click **Add Store**.
- 4 Specify this information:

Store

Enter the store for which to grant security rights. The system automatically populates the store description and **Store Org**.

Issues/Returns

Select to allow users to issue parts from this store and to return parts to this store.

Store-to-Store Issues (From Store)

Select to allow users to transfer parts from this store on the **Quick Store-to-Store Transfer** form and the **Store-to-Store Issues** form.

Store-to-Store Receipts (To Store)

Select to allow users to transfer parts to this store on the **Quick Store-to-Store Transfer** form and on the **Store-to-Store Receipts** form.

PO Receipts/Supplier Returns

Select to allow users to insert, update, or delete PO receipts for this store on the **PO Receipts** form and on the **Supplier Returns** form.

Physical Inventory

Select to allow users to insert or update physical inventory transactions for this store on the **Physical Inventory** form.

Non-PO Receipts

Select to allow users to insert, update, or delete non-PO receipts for this store on the **Non-PO Receipts** form.

Create Stock Records with Qty > 0

Select to allow users to add a new record to the **Stock** page of the **Parts** form with **Qty. > 0** or **Qty. for Repair > 0**.

Update Stock Records

Select to allow users to update **Qty. on Hand** on the **Stock** page of the **Parts** form.

Scrap Parts from Stock

Select to allow users to scrap parts directly on the Scrap popup.

- 5 Click **Submit**.

Creating security filters

The system includes the ability for system administrators to create a security filter using the Dataspy. A security filter enables you to filter which records users can see.

For example, you can create a security filter on the **Work Orders** form and then assign the security filter to a user group. The result is that members of the user group cannot see records that are not included in the security filter. So if the Security Filter is set to display all work orders with a **Status** of **Released**, then when the user opens the **Work Orders** form, no matter what personal Dataspy or quick filter they run, they will never be able to see records that have a **Status** other than **Released**. Users cannot disable a security filter.

To create a security filter, select **Security Filter** on the Dataspy Filter view. **Security Filter** is only displayed for users who are in the R5 user group, and it is disabled for system-delivered Dataspies.

For information about basic Dataspy functions, see the *Infor EAM User Guide*.

After creating a security filter, assign the security filter to a user group.

See "Granting Screen-Level Permissions to User Groups" on page 87.

Granting screen-level permissions to user groups

Grant screen-level permissions for data manipulation. Screen authorization for user groups is critical to database security and data integrity.

Note: Because even the system administrator can be locked out of Infor EAM, it is important to allow at least one other person, in addition to the system administrator, permission to the **Users** form.

To grant screen-level permissions to user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to grant screen-level permissions, and then click the **Screen Permissions** tab.
- 3 Click the plus sign (+) beside the menu and/or submenu you wish to view. The system expands the menu and/or submenu and displays the folders and screens that reside at various levels below the main menu and/or submenu structure.

See "Setting up menus for user groups" on page 88 for more information about the user group security hierarchy.

Note: Click the minus sign (-) to collapse the menu.

- 4 Select the screen to which to apply screen-level permissions. Screen Permissions becomes unprotected.

Note: If a screen has tabs in addition to a **List View** page and **Record View** page, select the tab to which you want to apply screen-level permissions.

Tab Available and **Tab Always Displayed** become unprotected if the tab is available at the screen level.

If you select a screen or tab that has system-defined security, certain fields will remain protected. For example, the **Issue/Return Parts** deletes are not allowed.

- 5 Select one or more of the following attribute options to determine the level of permissions authorized for the user group:

Check box	Description
Query	Select to allow users to retrieve data from the database.
Insert	Select to allow users to insert new data into the database.
Update	Select to allow users to update data previously retrieved from existing records in the database. Users must have query permission to update database information.
Delete	Select to allow users to delete data from the database. Users must have query permission to delete data from the database.
Tab Available	Select to make a tab available to the user group.
Tab Always Displayed	Select to display the tab to the user group at all times.

Note: If the user group has Insert or Update permissions to a screen, the user group must also have Query permissions to that screen.

Note: When you unselect Query, the Update and Delete check boxes are unselected.

When you select **Tab Always Displayed**, **Tab Available** is selected.

- 6 In **Security Filter**, specify the necessary Dataspy to prevent the user group from accessing specific records.

See "Creating security filters" on page 87.

- 7 Click **Submit**.

Setting up menus for user groups

Set up menus on the **Menus** tab of the User Groups page. Creating a menu structure for user groups is critical to database security and data integrity. The menu structure is displayed in a tree structure that extends to four levels: one Main Menu level, two Sub-Menu levels, and one Screen level. The Main Menu level may contain up to seven items. The Sub-Menu level may contain up to 30 items, and the items may be a mix of folders and screens. Finally, the Screen level may contain up to 30 items, but the items must be screens.

To set up menus for user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to set up menus, and then click the **Menus** tab.
- 3 View the tree structure, and then click the plus sign (+) beside the menu and/or sub-menu you wish to view. The menu and/or sub-menu are expanded, and then the folders and screens that reside at various levels below the main menu and/or sub-menu are displayed.

Note: Click the minus sign (-) to collapse the menu.

- 4 In **Available Screens**, select the screen to add to the menu structure.
- 5 Drag and drop the screen name into the desired menu structure location on the tree structure. The number of screens applied to the menu structure are verified. If less than 30 screens exist, the screen is added to the tree structure and expanded to illustrate the level of the screen as necessary. Also the screen is inserted into the Screen Permissions table and the Tab Permissions table as necessary.

Note: If you drop a screen into a sub-menu folder, the screen is added as the last child of the sub-menu folder. If you drop a screen to another screen, the screen is added directly below the existing screen.

You may also drag and drop main menu folders, sub-menu folders, and screens within the tree structure. You cannot make a higher-level item subordinate to a lower-level item, i.e., you cannot move a main menu folder to the Screen level.

When you delete a menu item, the screen is also deleted from the Screen Permissions table and the Tab Permissions table as necessary.

Showing menu items

Show a folder, screen, or tab that is hidden in the tree structure.

To show menu items:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to show menu items, and then click the **Menus** tab.
- 3 Select the folder, screen, or tab to show, and then click **Show Menu Item**.
- 4 Click **Save Record**.

Hiding menu items

Hide a folder, screen, or tab that is displayed in the tree structure.

To hide menu items:

- 1 Open the **User Groups** form.
- 2 Select the user group for which to hide menu items, and then click the **Menus** tab.
- 3 Select the folder, screen, or tab to hide, and then click **Hide Menu Item**.
- 4 Click **Save Record**.

Adding main menu folders

To add main menu folders:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to add main menu folders, and then click the **Menus** tab.
- 3 Select the main menu-level menu structure to which to add a folder, and then click **Add Main Menu Folder**. The system checks to determine if a main menu-level menu structure is selected on the tree structure and displays the Add Main Menu Folder popup.

Note: You cannot add a main-menu folder to the Sub-Menu or Screen level.

- 4 Specify this information:

Label

Enter the name of the new folder.

- 5 Click **Submit**.

Note: The system adds the main-menu folder directly below the existing main-menu item.

Adding sub-menu folders

To add sub-menu folders:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to add sub-menu folders, and then click the **Menus** tab.
- 3 Select the main menu folder or sub-menu folder menu structure to which to add a folder, and then click **Add Sub-Menu Folder**. The system checks to determine if a main menu folder or sub-menu folder menu structure is selected on the tree structure and displays the Add Sub-Menu Folder popup.

Note: You cannot add a sub-menu folder to the Screen level.

- 4 Specify this information:

Label

Enter the name of the new folder.

- 5 Click **Submit**.

Note: If you add a sub-menu folder to a main-menu folder, the system adds the sub-menu folder as the last child of the main-menu folder. If you add a sub-menu folder to another sub-menu folder, the system adds the screen directly below the existing sub-menu folder.

Changing label names

Change the label name of any menu item in the tree structure.

To change label names;

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to change label names, and then click the **Menus** tab.
- 3 Select the menu item for which to change the label name, and then click **Change Label**.
- 4 Specify this information:
New Label
Enter the new label of the menu item.
- 5 Click **Submit**.

Changing screen tab orders

Change screen tab orders to change the order that the tabs appear on the screen.

To change screen tab orders:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to change screen tab orders, and then click the **Menus** tab.
- 3 Select the screen for which to change the tab order, and then click **Change Tab Order**.
- 4 Specify this information:
Error Message
The system displays any error messages associated with the tab.
- 5 Click **Submit**.

Copying menus

Copy menus from one user group to another user group.

To copy menus:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group to which to copy menus, and then click the **Menus** tab.
- 3 Click **Copy Menu**. The system automatically populates **To Group** with the current user group.
- 4 Specify this information:
From Group
Enter the the user group from which to copy the menu.
- 5 Click **Submit**.

Viewing form-level help

View form-level help. Learn more information about the form, i.e., what the form is, how it is used, etc.

To view form-level help:

- 1 Select **Administration > Security > User Groups**.
- 2 Click the **Menus** tab.
- 3 Select the screen for which to view help, and then click **Help**.
- 4 View the help information.

Setting up scanner menus for user groups

Set up scanner menus on the **Scanner Menu** page of the **User Groups** form to associate prompts to a menu structure. In the system, the menu structure is displayed in a tree structure that extends to three levels: the Main Menu level, Sub-Menu level and DC Prompt, and Web Service Prompt level.

In order to create folders of the menu structure, you must first create a screen for each folder.

See "Creating and Modifying Screens" on page 17.

To set up scanner menus for user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to set up scanner menus, and then click the **Scanner Menu** tab.
- 3 View the tree structure, and then click the plus sign (+) beside the menu and/or sub-menu you wish to view. The system expands the menu and/or sub-menu and then displays DC Prompts and Web Service Prompts that reside at various levels below the main menu and sub-menu.

Note: Click the minus sign (-) to collapse the menu.

- 4 Specify a **Datasp** or **Filter** as necessary.
- 5 Under **All Available Prompts** select the prompt to add to the menu structure.
- 6 Drag and drop the prompt into the desired menu structure location on the tree structure. The system also inserts the prompt into the **Screen Permissions** table.

Note: If you drop a prompt into a sub-menu folder, the system adds the prompt as the last child of the sub-menu folder. If you drop a prompt to another prompt, the system adds the prompt directly below the existing prompt.

You may also drag and drop main menu folders, sub-menu folders, DC prompts, and Web Service prompts within the tree structure. You cannot make a higher-level item subordinate to a lower-level item, i.e., you cannot move a main menu folder to the DC Prompt or Web Service Prompt level.

To delete a menu item, select the menu item to delete, and then click **Delete Menu Item**. The system deletes the record and updates the tree structure. The system also deletes the prompt from the **Screen Permissions** table as necessary.

Adding scanner main menu folders

To add scanner main menu folders:

- 1 Select **Administration > Security > User Groups**.

- 2 Select the user group for which to add scanner main menu folders, and then click the **Scanner Menus** tab.
- 3 Select the main menu-level menu structure to which to add a folder, and then click **Add Main Menu Folder**. The system checks to determine if a main menu-level menu structure is selected on the tree structure and displays the Add Main Menu Folder popup.

Note: You cannot add a main-menu folder to the Sub-Menu, DC Prompt, or Web Service Prompt level.

- 4 Specify this information:

Menu Code

Enter the name of the new folder. The system automatically populates **Description**.

- 5 Click **Submit**.

Note: The system adds the scanner main-menu folder directly below the existing scanner main-menu item.

Adding scanner sub-menu folders

To add scanner sub-menu folders:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to add scanner sub-menu folders, and then click the **Scanner Menus** tab.
- 3 Select the main menu folder or sub-menu folder menu structure to which to add a folder, and then click **Add Sub-Menu Folder**. The system checks to determine if a main menu folder or sub-menu folder menu structure is selected on the tree structure and displays the Add Sub-Menu Folder popup.

Note: You cannot add a scanner sub-menu folder to the DC Prompt or Web Service Prompt level.

- 4 Specify this information:

Menu Code

Enter the name of the new folder. The system automatically populates **Description**.

- 5 Click **Submit**.

Note: If you add a scanner sub-menu folder to a scanner main-menu folder, the system adds the scanner sub-menu folder as the last child of the scanner main-menu folder. If you add a scanner sub-menu folder to another scanner sub-menu folder, the system adds the scanner sub-menu folder directly below the existing scanner sub-menu folder.

Defining status authorizations for user groups

System administrators define status change authorizations for user groups for activities such as approving work requests, completing work orders, approving purchase requisitions, and approving production requests.

To define status authorizations for user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to grant status change authorizations, and then click the **Status Authorizations** tab.
- 3 Click **Add Authorization**.
- 4 Specify this information:

Screen

Select the screen for which to define status authorizations.

From Status

Enter the status from which to change authorizations. The system automatically populates the description.

To Status

Enter the status to which to change authorizations. The system automatically populates the description.

- 5 Click **Save Record**.

Administering iProcure security for user groups

Administer iProcure security for user groups by specifying which iProcure buttons the system enables security.

To administer iProcure security for user groups:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to administer iProcure security, and then click the **iProcure Security** tab.
- 3 Specify this information:

Active

Select to administer iProcure security per button. By selecting **Active** for a user group, the system denies the user group access to the specified button functionality.

Note: Unselect **Active** to turn off security per button. By unselecting **Active** for a user group, the system grants the user group access to the specified button functionality.

- 4 Click **Save Record**.

Viewing menu structure and permissions for user groups

View user group permissions such as which user groups have access to specific screens, reports, or tabs. Verify security filters assigned to applicable user groups, or find screens and/or report locations in menu structures.

To view menu structure and permissions for user groups:

- 1 Select **Administration > Overview > Menu Structure and Permissions**.
- 2 View the menu structure and permissions information for user groups.

Setting up Mobile menus in Infor EAM

Infor EAM Mobile menus can be configured in Infor EAM based on user group. The following Infor EAM Mobile screens can be configured: Regular Mobile screen, Data Collection Prompt screen, Web Service Prompt screen, user Defined Mobile Grid screen.

To set up Mobile menus in Infor EAM:

- 1 Start Infor EAM.
- 2 Open the **User Groups** form.
- 3 Select the user group for which to set up Mobile menus, and then click the **Mobile Menus** tab.
- 4 Click **Add Main Menu Folder**. A system check determines if a main menu-level menu structure is selected on the tree structure, and the Add Main Menu Folder popup is displayed.
- 5 Specify this information:
Label
Type in the label for the Main Menu Folder.
- 6 Click **Submit**. The record is saved and **Menu Details** is updated.
- 7 Highlight a **Main Menu Folder** and click **Add Sub-Menu Folder**. The Add Sub-Menu Folder popup is displayed.
- 8 Specify this information:
Label
Type in the label for the Sub-Menu Folder.
- 9 Click **Submit**. The record is saved and **Menu Details** is updated.
- 10 Drag Mobile screen from the **Available Screens** list, and then drop it in the Main Menu Folder or Sub-Menu Folder. The record is saved and **Menu Details** is updated.
- 11 Repeat above steps to configure all menu items.
- 12 To show or hide a menu item, select a menu item and click **Show Menu Item** or **Hide Menu Item**.
- 13 To delete a menu item, select a menu item and click **Delete Menu Item**.
- 14 To change the label of an existing menu item, select a menu item and click **Change Label**.
- 15 To change the icon of the Main Menu item, select a menu item and click **Change Icon**. The Change Icon popup is displayed. Type in the name of **New Icon** without file name extension.

Note: Main Menu icon configuration is only available on Quarter VGA version. Only .gif and .jpg image file types are acceptable. The image file must be available in the same folder as Mobile executables on the Mobile device.

16 To copy a menu item, select the menu item, and then click **Copy Menu**.

Setting default values for user groups in Mobile

Configure the default value settings for user groups on the Infor EAM Mobile application or mobile devices.

To set default values for user groups in Mobile:

- 1** Select **Administration > Security > User Groups**.
- 2** Select the user group for which to set default values in Mobile, and then click the Mobile Settings tab.

3 Specify this Work information:

Download Work Orders

Select the checkbox to download work orders by default for the user group.

Specify the dataspy for which to download work orders in **For Dataspy**.

Download Employees

Select the checkbox to download employees by default for the user group.

Specify the trade, department, or employee for which to download employees for the user group in **For Trade**, **For Department**, or **For Employee**.

Download Standard WOs

Select the checkbox to download standard work orders by default for the user group.

Download Inspection Results

Select the checkbox to download inspection results by default for the user group.

Download Task

Select the checkbox to download tasks by default for the user group.

4 Specify this Equipment information:

Download Equipment

Select the checkbox to download equipment by default for the user group.

Specify the department, location, class, category, equipment, or type for which to download equipment for the user group in **For Department**, **For Location**, **For Class**, **For Category**, **For Equipment**, or **For Type**.

Download Equipment Comments

Select the checkbox to download equipment comments by default for the user group.

Specify whether to download the equipment comments for work orders only in **For Downloaded WO only**.

Download Equipment History

Select the checkbox to download equipment history by default for the user group.

Specify whether to download equipment history for work orders only, or for the latest days in **For Downloaded WO only**, or **For Latest (Days)**.

Download Equipment Custom Fields

Select the checkbox to download equipment custom fields by default for the user group.

Specify whether to download equipment custom fields for only work orders in **For Downloaded WO only**.

Download Cost Codes

Select the checkbox to download equipment cost codes by default for the user group.

Specify the class or cost code for which to download equipment cost codes in **For Class** or **For Cost Code**.

Download Equipment History Comments

Select the checkbox to download equipment history comments by default for the user group.

5 Specify this Materials information:**Download Stores**

Select the checkbox to download stores by default for the user group.

Download Parts

Select the checkbox to download parts by default for the user group.

Specify the store or part for which to download for parts for the user group in **For Store** or **For Part**

In Stock and Quantity

Specify the required number of parts in stock at the default store. The number you specify here becomes the default stock number the part must meet before the part will be download for the user group. For example, specify 4, and only those parts with a quantity of 4 or more in stock (in the store) will be downloaded.

Download Bins

Select the checkbox to download bins by default for the user group.

Specify the store or bin to download for bins for the user group in **For Store** or **For Bin**.

Download Physical Inventory

Select the checkbox to download physical inventory by default for the user group.

Specify the store or line to download physical inventory for the user group in **For Store** or **For Line**.

Download Supplier

Select this checkbox to download the list of suppliers by default for the user group.

Download Asset Inventory

Select the checkbox to download asset inventory by default for the user group.

Download Stock

Select the checkbox to download stock by default for the user group.

6 Specify this Other information:

Download eSignature Settings

Select the checkbox to download the eSignature settings by default for the user group. This checkbox determines the records displayed on the eRecords Setup screen.

Setting up users

Set up users with access to the system as members of user groups. You can also edit users as necessary. After setting up new system users, associate them with specific organizations. When the user logs in to the system, the default organization determines to what user group the user belongs for that system session.

Creating users

Note: Only a certain number of users can be active for each product. This number is determined by the CDKEY installation parameter (Infor EAM), CDKEYREQ installation parameter (Infor EAM Requestor), 7IMCDKEY installation parameter (Infor EAM Mobile), 7IWCDKEY installation parameter (Infor EAM Connector), and/or the 7IBCDKEY installation parameter (Infor EAM Barcoding).

To create users:

- 1** Select **Administration > Security > User Setup**.
- 2** Click **New Record**.
- 3** Specify this User Details information:

User ID

Specify a unique code identifying the user, and then enter a description of the user in the adjacent field. The description is usually the user's full name.

Language

Select the default language for the user.

User Group

Specify the user group to which the user is assigned.

User ID Expiration Date

Specify the date on which the User ID expires.

Password

Specify a six to twelve character password for the user. The password is masked with asterisks as you type.

Note: After a set amount of unsuccessful attempts to log in, **User ID** and **Password** are locked. At this point, the system administrator or another authorized user must unlock the user record.

To unlock the user record, open the User Setup page, which will display the **Unlock User** button (under normal circumstances, the **Unlock User** button is hidden). Click the **Unlock User** button. The user is unlocked and the **Unlock User** button is hidden.

Password Expiration Date

Specify the date on which the password expires.

E-mail Address

Specify the user's e-mail address.

External User ID

Specify an external User ID to provide an alternate method of identifying the user. The external user ID provides the method to identify the user based on an identifier from an external system such as Active Directory or some alternate identify provider.

Note: **External User ID** must be unique for each user ID and external user ID in the system except it can be the same as the user's **User ID**.

Associated Supplier

Specify the supplier to associate with the user when ordering parts.

Default Store

Specify the default store for the user from which parts will be issued or returned for work orders, equipment, or requisitions.

Buyer

Select if the user can generate requisitions and purchase orders to buy materials/services.

Note: **Buyer** must be selected for a user for the system to display the user as a potential purchaser of materials and services in the lookups for **Buyer**.

Allow Dataspy Edits

Select if the user can edit Dataspies. If unselected the **Edit Dataspy** button is hidden throughout the system on every form for this specified user.

Mobile Administrator

Select if the user is an administrator for Infor EAM Mobile.

Allow Dataspy Advanced Filters

Select if the user can specify advanced filters for Dataspies.

Allow Global Dataspy Configuration

Select if the user can configure global Dataspy settings for all users.

Allow Editing of Other's Comments

Select if the user can edit comments made by others.

Allow Editing of Own Comments

Select if the user can edit their own comments.

Allow Cancelling of WO Daily Scheduling Sessions

Select if the user can cancel work order daily scheduling sessions on the WO Daily Scheduling page.

Class

Specify the class code for the user.

Locale

Select the locale of the user.

Department

Specify the default department for the user.

Session Timeout (minutes)

Specify the amount of time in minutes in which the system will timeout.

Success Msg. Timeout

Select the amount of time in which success messages will timeout.

First Screen

Specify the code identifying the function to which the system defaults when the user logs in to the system.

Screener

Select if the user can screen work requests.

Screen Designer

Select if the user can set up the appearance of screens.

Accessibility Mode

Select to indicate that for the user the system will operate in accessibility mode when they next log in to Infor EAM. In **Accessibility Mode** the Infor EAM application is entirely keyboard-navigable wherein the user will be required to navigate and access features via keyboard shortcuts only. Additionally those fields with special formatting or validation will display a popup tool tip.

Note: Accessibility Mode is designed for use with a screen reader program such as JAWS.

Allow Screen Cache Setup

Select to enable the **Add to Screen Cache** and **Remove from Screen Cache** options for the user on available screens.

Allow Creating Import Utility Template

Select to enable the **Create Import Utility Template** option for the user.

Allow Viewing Audit Trail

Select to enable the **Audit Trail** option for the user.

Enable Screen Cache Deck

Select to enable the user to view and access the screen cache tabs at the bottom of all screens.

Enable Transition Animations

Select to enable screen transitions for the user if the user changes screens via the Screen Cache tabs at the bottom of a screen.

Allow Changes to Mobile Settings

Select to enable the user to make changes to settings in mobile devices.

4 Specify this Infor EAM Products information:**Infor EAM**

Select to indicate that the user is an Infor EAM user.

Connector

Select to indicate that this user is an Infor EAM Connector user.

Analytics

Select to indicate that the user is an Infor EAM Analytics user.

Note: If the Analytics user will create variables within Infor EAM, you must also select Infor EAM.

Requestor

Select to indicate that this user is an Infor EAM Requestor user.

Note: Specify the Requestor user group in **User Group** to associate the Requestor user with the Requestor user group.

The Requestor user may only submit work requests and/or purchase requests.

Barcoding

Select to indicate that this user is an Infor EAM Barcoding user.

Mobile

Select to indicate that this user is an Infor EAM Mobile user.

5 Specify this Advanced Reporting Options information:**Consumer**

Select to indicate that the user is a reporting consumer. The consumer license allows users to access the consumer and basic report features.

Author

Select to indicate that the user is a reporting author. The author license allows users to access the Report Author functionality in Infor EAM to create reports as well as access to the consumer and basic report features.

6 Specify this User Limits information:**Requisition**

Specify the maximum amount the user can enter on a requisition or requisition line.

Requisition Approval

Specify the maximum amount the user can approve for a requisition.

Invoice Approval

Specify the maximum amount the user can approve on invoices and invoice lines.

Non-PO Inv. Approval

Specify the maximum amount the user can approve on non-purchase order invoices.

Purchase Order

Specify the maximum amount the user can enter on a purchase order or purchase order line.

PO Approval

Specify the maximum amount the user can approve for a purchase order or purchase order line.

Note: Set **Requisition**, **Purchase Order**, **Requisition Approval**, and **PO Approval** at either the header level or the line-item level in Installation Parameters. You do not need to define them for every user.

If you are setting up a new user in a multi-organization environment the fields are set on the **Organizations** tab of the User Groups page and the Roles page.

Pick Ticket Approval

Specify the maximum amount of parts that the user can approve for pick tickets.

Note: If multi-organization security is activated, you must define purchase order and requisition limits on the **Organization** tab of the User page.

7 Click Save Record.

Note: Click **Unlock User** to unlock locked users and make them active in the system.

The following fields are editable on the **List View** tab of the User ID page: **User ID**, and Infor EAM.

Changing passwords

Change passwords for individual users. Passwords are encrypted in the .xml configuration files and are preceded by '{ENCR}' in the .xml file. The following types of passwords will be encrypted: database schema passwords, Websphere/Weblogic administrator passwords, and LDAP access-user passwords.

To change passwords:

- 1** Open the appropriate .xml file, and then delete the encrypted password and the '{ENCR}' prefix.
- 2** Enter the new (unencrypted) password.
- 3** Redeploy the application.

Associating users with organizations

After setting up new system users, associate them with specific organizations. When the user logs in to the system, the default organization determines to what user group the user belongs for that system session.

To associate users with organizations:

- 1 Select **Administration > Security > User Setup**.
- 2 Open the form.
- 3 Select the user with whom to associate the organization, and then click the **Organizations** tab.
- 4 Click **Add Organization**.
- 5 Specify this information:

Organization

Enter the organization to associate with the user. The system automatically populates the organization's description in the adjacent field and selects **Common** if the organization is a common organization.

User Group

Enter the user group to which the user belongs.

Default

Select to indicate that this organization is the default organization for this user, i.e., the system automatically displays this organization when the user logs in to Infor EAM and on most forms that have an **Organization** lookup.

Note: The system allows only one default organization.

Requisition

Enter the user's requisition limit.

Requisition Approval

Enter the user's requisition approval limit.

Invoice Approval

Enter the user's invoice approval limit.

Non-PO Inv. Approval

Enter the user's non-purchase order invoice approval limit.

Purchase Order

Enter the user's purchase order limit.

PO Approval

Enter the user's purchase order approval limit.

Pick Ticket Approval

Enter the user's pick ticket approval limit.

- 6 Click **Submit**.

Associating users with KPIs

KPIs associated with a specific user are displayed in the KPI section of the user's **Start Center**. Review, add, and remove KPIs associated with a specific user on this screen.

To associate users with KPIs:

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user for which to associate a KPI, and then click the **KPIs** tab.
- 3 Click **Insert KPI Entry**.
- 4 Specify this information:

Sequence Number

Specify the sequence in which the KPI will be displayed in the **Start Center** for the user.

KPI Code

Specify the KPI to add to the **Start Center** for the user. Select one or more KPI codes if desired for the specific user.

Note: If you select more than one KPI code for the user, a new sequence number is assigned to each KPI code and these sequence numbers are generated based on the *INCRLINO* installation parameter.

- 5 Select the **Auto Refresh** check box to automatically refresh the KPI every time the **Start Center** is invoked for the user.
- 6 Click **Submit**.

Associating users with inboxes

Associate users with inbox entries to display entries in the inbox of the **Start Center** for that specific user. Inbox entries associated with a user on this tab with display on that user's Start Center inbox.

To associate users with inboxes:

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user for which to associate an inbox entry, and then click the **Inboxes** tab.
- 3 Click **Insert Inbox Entry**.
- 4 Specify this information:

Sequence Number

Specify a numeric value for the sequential order for the inbox entry to display.

Note: Sequential order is determined by the incremental value set by the *INCRLINO* installation parameter.

Inbox Code

Specify the unique code that identifies the inbox entry. Select one or more inbox codes if desired for the specific user.

Note: If you select more than one inbox code for the user, a new sequence number is assigned to each inbox code and these sequence numbers are generated based on the *INCRLINO* installation parameter.

Folder

Specify the folder in which to keep the inbox based on the category.

- 5 Select the **Auto Refresh** check box to automatically refresh the inbox every time the **Start Center** is invoked.
- 6 Click **Submit**.

Creating LDAP roles

Lightweight Directory Access Protocols (LDAP) can store hierarchical data definitions across platforms. LDAP is most often used to store user credentials across many applications. Create LDAP roles for automatic user creation.

Note: If LDAP authentication is enabled, Call Center module log ins are authenticated by Infor EAM and LDAP settings are ignored.

To create LDAP roles:

- 1 Select **Administration > Security > Role Setup**.
- 2 Click **New Record**.
- 3 Specify this information:

Role

Enter a unique code identifying the role, and then enter a description of the role in the adjacent field.

User Group

Enter the user group to which users of the role are assigned.

Note: If you enter a Requestor user group in **User Group**, the system automatically selects Infor EAM Requestor and automatically unselects Infor EAM.

Default Org.

Enter the default organization of the role.

Language

Select a default language for the role.

Success Msg. Timeout

Select the amount of time in which success messages will timeout.

Infor EAM Mobile Administrator

Select if users of the role are administrators of Infor EAM Mobile.

Locale

Select the default locale for the role.

Department

Enter a default department for the role.

First Screen

Enter the code identifying the screen to which the system defaults when users of the role log in.

Buyer

Select if the user of the role can buy materials or services.

Screener

Select if the users of the role can screen work requests.

Infor EAM

Select if the user of the role is an Infor EAM user.

Infor EAM Requestor

Select if the user of the role is a Requestor user.

Note: Enter the Requestor user group for **User Group** to associate the Requestor user with the Requestor user group.

The Requestor user may only submit work requests and/or purchase requests.

You cannot select Infor EAM and Infor EAM Requestor for the same user; however, you must select either Infor EAM or Infor EAM Requestor.

Infor EAM Connector

Select if the user of the role is a Connector user.

Infor EAM Barcoding

Select if the user of the role is an Infor EAM Barcoding user.

Infor EAM Mobile

Select if the user of the role is an Infor EAM Mobile user.

Infor EAM Analytics

Select if the user of the role is an Infor EAM Analytics user.

Consumer

Select if the users of the role are Advanced Reporting consumers.

Author

Select if the users of the role are Advanced Reporting authors.

Requisition

Enter the maximum amount users of the role can enter on a requisition or requisition line.

Requisition Approval

Enter the maximum amount users of the role can approve for a requisition or requisition line.

Invoice Approval

Enter the maximum amount users of the role can approve on invoices and invoice lines.

Non-PO Inv. Approval

Enter the maximum amount users of the role can approve on non-purchase order invoices.

Purchase Order

Enter the maximum amount users of the role can enter on a purchase order or purchase order line.

PO Approval

Enter the maximum amount users of the role can approve for a purchase order or purchase order line.

Pick Ticket Approval

Enter the maximum amount users of the role can approve for pick tickets.

4 Click Save Record.

Creating electronic records and signatures

The system allows you to create electronic records, or "snapshots," of events that occur in the database. A snapshot preserves the entire record, including information related to other database tables, to provide historical information related to the progress of your operation. For example, a snapshot of a work order header will include all information on the header as well as the associated activities. The system also provides the ability to print and export snapshots to external formats such as Adobe Acrobat Portable Document Format (.PDF).

In addition to creating electronic records of information in the database, you can set up the system to require an electronic signature to authorize status changes to specific records. The electronic signature is attached to an entity, and when a system user changes the status of a record based on specific criteria, the system prompts the user for an ID, password, and a reason for the signature (e.g., review, approval, responsibility, etc.).

You can also select to associate certifications with electronic signatures to facilitate the proper authorization of status changes by requiring authorized users to enter a certification number and certification type when entering their signature, which is required by the Federal Aviation Administration (FAA) for electronic signatures. The FAAMOD installation parameter determines whether you are required to enter a certification number and certification type for electronic signatures. If FAAMOD is set to ON, the system displays **Certification Number** and **Certification Type** on the Electronic Signature dialog box and you must enter a valid certification number and type to sign the record.

See "Signing Records" on page 109.

Defining entities for electronic records and signatures

Define entities to take a snapshot of the record or require an electronic signature when you change the status of the record attached to the entity. For example, if your organization requires electronic records of the specific stages of a purchase order, you can define the snapshot for the PORD entity. Or, if your organization requires electronic signatures of status changes to work orders, you can define the electronic signature for the EVNT entity. The system takes the snapshot of the record and/or prompts you (or any user) for an ID, password, and reason when you save the change to the database.

The following table lists the entities for which you can create electronic records and signatures:

Entity	Description	Information Recorded
EVNT	Event	Work order, activities, repairable parts, permits
OBJ	Equipment	Equipment and warranties
RECV	Receipts	Receipt and receipt lines
RETN	Returns	Return and return lines
STOS	Store-to-Store	Store-to-store transaction and lines
PROJ	Project	Project and budget
PICK	Pick Ticket	Pick tickets and lines
PORD	Purchase Order	Purchase order and lines
REQ	Requisition	Requisition and lines
INV	Invoice	Invoice and lines

To define entities for electronic records and signatures:

- 1 Select **Administration > Security > eRecords Setup**.
- 2 Click **New Record**.
- 3 Specify this information:

Entity

Select the entity for which to define electronic records and/or signatures. The system automatically populates the entity description.

Signature Required

Select to indicate that the status change requires a signature.

From Status

Enter the old status of the entity.

To Status

Enter the new status of the entity.

- 4 Click **Save Record**.

Signing records

Upon changing the status of a record that has been defined as requiring an electronic signature, the system prompts you to enter a user ID, password, and reason for the signature. The user ID and password are the same ID and password used to enter the system; however, any person with a valid user ID and password can sign electronic records, even if they are not physically logged in to the system. After verification of the user information, the system takes a snapshot of the record and stores it in the database. If you update multiple records at one time, the system prompts you for a signature for every record.

To sign records:

- 1 Open any form requiring electronic signatures for status changes.
- 2 Query for the record for which to change the status. Status changes can include record insertion, deletions, or any specific change as defined on the **eRecords Setup** form.
See "Defining Entities for Electronic Records and Signatures" on page 108.
- 3 Change the status of the selected record, and then click **Save Record**.
- 4 Specify this information:

User ID

Enter the user ID.

Password

Enter the password associated with the user ID.

Signature Type

Enter the reason for the electronic signature, e.g., review, approval, etc. Define signature types for the ESTP entity on the **System Codes** form.

See "Defining System Codes" on page 16.

Certification Number

Enter the unique certification number for the eSignature. The system automatically populates

Certification Type

Certification Type

Modify the certification type as necessary.

Note: The FAAMOD installation parameter determines whether you are required to enter a certification number and certification type for electronic signatures. If FAAMOD is set to ON, the system displays **Certification Number** and **Certification Type** on the eSignature popup, and you must enter a valid certification number and type to sign the record. The system automatically populates **Certification Type** based on the selected **Certification Number**. Certification numbers and types are associated with employee records on the **Qualifications** tab of the **Employees** form. The **Qualifications** tab is not available in Infor EAM for SQL Server.

The system only displays certification numbers and types that are associated with training records for which the employee is currently qualified in the lookups for **Certification Number** and **Certification Type**.

Additionally, the system associates certification numbers and types with employees based on the user group of the employee on the **Employees** form. Therefore, if FAAMOD is set to ON, you must

select a **User** for each employee who is required to enter a certification number and type when signing electronic records.

5 Click **OK**.

Note: If you click **Cancel**, the system closes the form and does not record changes.

The system does not allow changes to the record without entering an electronic signature. Further, if you enter an invalid or expired ID and password, or if you do not enter a valid certification number and type if applicable, or if you do not have status change authorization, the system records an access violation and the electronic signature will not be recorded. If the number of unsuccessful signature attempts exceeds the number specified in the SECUVIOL installation parameter, the system locks the user. Contact your System Administrator to unlock users.

Configuring electronic records and signatures for cGMP equipment

Create electronic records and/or require electronic signatures for work performed on cGMP equipment. Current Good Manufacturing Practices (cGMP) are a set of standards established by the United States Food and Drug Administration (FDA) to regulate the manufacturing processes of the food, pharmaceutical, and medical equipment industries.

Many companies have a combination of equipment regulated by cGMP standards as well as equipment not regulated by cGMP standards. Configure the system to take a snapshot of a record or require an electronic signature only when the work is performed on cGMP equipment.

Note: To indicate that a piece of equipment is subject to cGMP standards, select **cGMP** on the **Record View** page of the Assets, Positions, or Systems form.

To configure the system to create electronic records and/or require signatures for only cGMP equipment, set the CGMPONLY installation parameter to YES.

See the *Infor EAM User Guide*.

You must also define the electronic records/signatures for the EVNT entity on the eRecords Setup form.

See "Defining Entities for Electronic Records and Signatures" on page 108.

If CGMPONLY is set to YES and you have configured electronic records/signatures for the EVNT entity, the system creates an electronic record and/or requires a signature for work orders created/generated only for cGMP equipment.

Note: If you create a PM route that is associated with a work order containing cGMP equipment, the system creates an electronic record and/or requires a signature for the work order associated with the cGMP equipment in the PM route. The system does not create a separate electronic record or require a signature for each child work order on the PM route.

The electronic signatures for cGMP equipment configuration apply to work orders created/generated for cGMP equipment using the following forms:

- **Work Orders** form

- **Work Orders Quick Close** form
- **Service Requests** form
- **Generate/Release Work Orders** form

Granting status change authorization permissions

Users have different levels of authority within the system. For example, a manager might have authority to approve purchase requisitions. A planner might have authority to cancel a work order. A project manager might have authority to freeze a project.

Set up authorization levels for entity status values when records for the entity are created or when their status is modified. Set authorization levels for user groups or individual users.

To grant status change authorization permissions:

- 1 Open the **Status Change Authorizations** form.
- 2 Click **Add Authorization**.
- 3 Specify this information:

User Group

Enter the user group for which to define the status change authorization. Enter * if the authorization applies to all groups. The system automatically populates the user group description.

Note: **User Group** and **User** cannot both have a value of *.

User

Enter the user for whom to define the status change authorization. Enter * if the authorization applies to all users in the user group. The system automatically populates the user description.

Entity

Enter the entity over which the user has authority. The system automatically populates the entity description.

From Status

Enter the status code the user can change. The system automatically populates the from status description.

To Status

Enter the status code to which the user can change the old status code. The system automatically populates the to status description.

Note: If you want the group to have authorization over all aspects of a particular process, enter all of the available status changes for that process. Enter * for any status and - for "No status yet" (i.e., to indicate a new record).

User Specific Auth.

Select to indicate that the authorization is for this user only.

4 Click **Submit**.

This chapter provides information about configuring the Infor EAM interface. Personalize the Start Center by setting up inbox entries, KPIs, and chart controls. Modify the page layout of record view, detail view, and list-detail view pages.

Note: This chapter describes Infor EAM functions that only a system administrator has rights to perform.

Personalizing the Start Center

Personalize the **Start Center** to display inbox entries and KPIs. Inbox entries notify you of changes in the database, and KPIs measure productivity or efficiency with processes or work-related activities.

Personalizing the inbox

The inbox displays notifications (inbox entries) of changes in the system database on the **Start Center**. An example of inbox entries is the number of work orders with associated warranties for which there have been no claims submitted.

Users can open screens necessary to complete actions or activities associated with inbox entries by double-clicking the inbox entry. For example, launch the **Work Orders** form directly from the inbox entry to approve the work orders requiring approval. A Dataspy entered for inbox entries automatically searches for and retrieves the records associated with an inbox entry to the called screen.

Inbox entries can be assigned to specific user groups, specific users, or defined as public entries that are displayed for all users. After personalizing the inbox, set system privileges for users to modify their inbox by adding and/or deleting entries and modifying the order and sequence in which entries are displayed.

Setting up inbox entries

Set up inbox entries by identifying the notifications that you wish to be displayed in the inbox. Select a SQL statement for the entry to query the database for the appropriate information to retrieve to the

inbox. Select an appropriate screen to associate with the entry, e.g., the **Work Orders** form for an inbox entry for work orders that currently require approval. Specify a **Dataspy** to enable the system to automatically query for the records associated with the inbox entry to the called screen. You can also designate whether the entry is accessible to all users (public), or specify the user groups for which to enable the entry.

To set up inbox entries:

- 1 Select **Administration > Start Center Setup > Inbox Setup**.
- 2 Click **New Record**.
- 3 Specify this information:

Inbox Code

Specify a unique code identifying the the inbox entry, and then enter a description of the activity to complete for the inbox entry in the adjacent field. The description will be displayed in the Inbox on the **Start Center**.

SQL Statement

Specify the SQL statement to calculate the number of applicable records for the inbox entry. **SQL Statement Text** is automatically populated.

Note: **SQL Statement** cannot exceed the performance score limit defined in the **INBXSCOR** installation parameter.

Public

Select to give all user groups access to the inbox entry.

Note: Inbox entries for which user groups have been associated cannot be public.

Screen

Specify the system screen for which to enable a hyperlink to call the screen for the inbox entry.

Note: If you update **Screen**, **Dataspy** is cleared.

Forms Screen

Specify the Infor EAM Oracle Forms screen for which to enable a hyperlink to call the screen for the inbox entry.

Dataspy

Select the **Dataspy** used to retrieve records for the called system screen.

Filter

Specify the where clause with which to associate the inbox entry.

- 4 Click **Save Record**.

Defining inbox ranges

Define inbox ranges to specify a **High Value** and a **Low Value** for each of the scoring ranges defined for an inbox.

To define inbox ranges:

- 1 Select **Administration > Start Center Setup > Inbox Setup**.
- 2 Select the inbox for which to define ranges, and then click the **Ranges** tab.
- 3 Click **Add Range**.
- 4 Specify this information:

Low Value

Specify the value for the low threshold of the inbox range.

High Value

Specify the value for the high threshold of the inbox range.

Color

Select the color to use to display the inbox field box.

Description

Specify a description of the icon to be displayed for the inbox range on the **Start Center**.

- 5 Click **Submit**.

Associating inbox entries with user groups

Associate inbox entries with user groups to display entries in the inbox for only specific user groups.

Note: Inbox entries for which **Public** has been selected cannot be assigned to specific user groups.

To associate inbox entries with user groups:

- 1 Select **Administration > Start Center Setup > Inbox Setup**.
- 2 Select the inbox entry with which to associate user groups, and then click the **User Groups** tab.
- 3 Click **Add User Group**.
- 4 Specify this information:

User Group

Specify the user group to which to associate the inbox entry.

- 5 Click **Submit**.

Associating inbox entries with users

Associate inbox entries with specific users to display the entries in the inbox of the user's **Start Center**. Alternately, you can review or remove a user's associated inbox entries.

To associate inbox entries with users:

- 1 Select **Administration > Start Center Setup > Inbox Setup**.
- 2 Select the inbox entry with which to associate an user, and then click the **Users** tab.
- 3 Click **Add User**.

4 Specify this information:

User ID

Specify the user's unique ID to which to associate the inbox entry.

Note: **User ID** is a multi-select lookup which allows you to select more than one user to associate to an inbox entry. If you select more than one user to associate to the inbox entry, a new sequence number is assigned to each user, and these sequence numbers are generated based on the **INCR_LINO** installation parameter.

Folder

Specify the folder in which to keep the inbox based on the category.

5 Select the **Auto Refresh** check box to automatically refresh the inbox every time the **Start Center** is invoked for this specific user.

6 Click **Submit**.

Personalizing KPIs

The **Start Center** displays key performance indicators (KPIs) and their scores for users. KPIs are user-defined parameters that measure productivity or efficiency associated with processes and/or work order-related activities. An icon is displayed on the **Start Center** for each KPI that enables users to view the status of their work environment with respect to the KPIs specific to their job, as well as the current score for each KPI.

After defining KPIs, grant users access to the KPIs. KPIs can either be user-group specific, user-specific, or public. Public KPIs can be displayed for all users. Define system privileges for users to personalize their **Start Center** to display KPIs based on their preferences.

Note: After personalizing the KPIs, the system administrator must start the KPI driver to enable the system to recalculate KPI scores based on the specified interval for each KPI.

See "Setting up jobs" on page 161.

To personalize your company's KPI images, replace the default images provided by the system. KPI images are stored in the following location on the application server:

- For Jboss installations: APP_HOME/jboss/shared/deploy/web.war/images/default
- For Websphere installations: IBMHttpServer_HOME/web.war/images/default
- For Weblogic installations: APP_HOME/apache/web.war/images/default

Setting up KPIs

Set up key performance indicators (KPIs) for the **Start Center**. For example, define a KPI to measure the number of maintenance dollars spent for a production line during a month.

Select a SQL select statement for the KPI to calculate the current value for the KPI. Select a screen for which to enable a hyperlink for the KPI, and then enter a Dataspy to enable the system to

automatically query for the records associated with the KPI to the called screen. You can also designate whether the KPI is accessible to all users.

To set up KPIs:

- 1 Select **Administration > Start Center Setup > KPI Setup**.
- 2 Click **New Record**.
- 3 Specify this information:

KPI Code

Specify a unique code identifying the KPI, and then enter a description of the KPI in the adjacent field. The description will be displayed for the KPI on the **Start Center**.

Out of Service

Select to indicate the KPI should not display in KPI lookups.

Frequency

Specify the frequency in days with which the KPI will be recalculated.

SQL Statement

Specify the SQL statement to calculate the current value for the KPI. The system automatically populates **SQL Statement Text**.

Note: **SQL Statement** cannot exceed the performance score limit defined in the KPISCOR installation parameter.

Type

Select the KPI display type to represent the data in the **Start Center**, e.g., select **Donut** to represent the key performance indicators in a gauge graph.

UOM

Specify the unit of measure for the KPI.

Maintain History

Select to record the history of the KPI.

See "Viewing KPI history" on page 121.

Public

Select to give all user groups access to the KPI.

Note: KPIs for which user groups have been associated cannot be **Public**.

Parent

Select to indicate that the KPI is a parent KPI.

Donut Radius %

If you selected **Donut** as the KPI type, enter the radius percentage to represent the donut.

Gauge Min.

If you selected **Donut** as the KPI type, enter the minimum gauge value.

Gauge Max.

If you selected **Donut** as the KPI type, enter the maximum gauge value.

Screen

Specify the system screen for which to enable a hyperlink to call the screen for the KPI.

Note: If you update **Screen**, the system clears **Dataspy**.

Forms Screen

Specify the Infor EAM Forms screen for which to enable a hyperlink to call the screen for the KPI.

Dataspy

Select the Dataspy used to retrieve records for the called system screen.

Filter

Specify the where clause with which to associate the KPI.

KPI Display Options

Select either Normalized Values (Weighted Average), Actual Values (Weighted Average), or Actual Values (Summed).

Note: **Parent** must be selected to enable **KPI Display Options**.

- 4 Click **Save Record**.

Defining KPI ranges

Define KPI ranges to specify a **High Value** and a **Low Value** for each of the scoring ranges defined for a KPI.

Specify a **Normal Score** that corresponds with each high and low value for a KPI range. The normal score for a child KPI is rolled up to any parent KPIs when calculating the **Current Value** and **Normal Score** for the parent KPIs.

For example, a child KPI measures the productivity of a production line during a month. The target goal for the KPI is 200,000 units per month. If the production line produces between 200,000 to 133,333 units per month, the normal score for the KPI is 3, which indicates an excellent score. 133,332 to 66,666 units is 2, which indicates an average score. 66,665 units or less is 1, which indicates a poor score.

Note: You should maintain consistency when defining normalized scores for KPI ranges. For example, if you define a normalized score based on a scale of 1 to 3 for one KPI, use that same scale for other KPIs.

Note: You cannot enter a **Normal Score** if the KPI is a parent KPI.

To define KPI ranges:

- 1 Select **Administration > Start Center Setup > KPI Setup**.
- 2 Select the KPI for which to define KPI ranges, and then click the **Ranges** tab.
- 3 Click **Add Range**.
- 4 Specify this information:

Low Value

Specify the value for the low threshold of the KPI range.

High Value

Specify the value for the high threshold of the KPI range.

Normal Score

Specify the numeric value that represents the score based on the values entered for **Low Value** and **High Value**.

Image Path

Specify the URL file path to the image the system will use to display the KPI range on the **Start Center**. To enter the path to the image, **Type** must be **Image** on the **KPI Setup** screen.

Color

Select the color to use to display the KPI range on the **Start Center**. To specify the color, **Type** cannot be **Image** on the **KPI Setup** screen.

Description

Specify a description of the displayed KPI range on the **Start Center**.

- 5 Click **Submit**.

Associating KPIs with user groups

Associate KPIs with user groups to enable them to display only the KPIs that are associated with their user group in the KPI list.

Note: You can only assign KPIs to user groups for which **Public** has not been selected.

To associate KPIs with user groups:

- 1 Select **Administration > Start Center Setup > KPI Setup**.
- 2 Select the KPI with which to associate user groups, and then click the **User Groups** tab.
- 3 Click **Add User Group**.
- 4 Specify this information:

User Group

Enter the user group to which to associate the KPI. The system automatically populates the user group description.

- 5 Click **Submit**.

Associating KPIs with users

Associate KPIs with specific users to display the KPIs in the KPI list of the user's **Start Center**. Alternately, you can review or remove a user's associated KPI.

To associate KPIs with users:

- 1 Select **Administration > Start Center Setup > KPI Setup**.
- 2 Select the KPI with which to associate users, and then click the **Users** tab.
- 3 Click **Add User**.
- 4 Specify this information:

User ID

Specify the user's unique ID to which to associate the KPI.

Note: User ID is a multi-select lookup which allows you to select more than one user to associate to a KPI. If you select more than one user to associate to the KPI, a new sequence number is assigned to each user, and these sequence numbers are generated based on the **INCR_LINO** installation parameter.

- 5 Select the **Auto Refresh** check box to automatically refresh the KPI every time the **Start Center** is invoked for the specific user(s).
- 6 Click **Submit**.

Defining KPI structures

Define KPI structures to create parent/child relationships between KPIs. The scores for child KPIs roll up to all of the children's parents. For example, you create a parent KPI to measure the overall efficiency of a production department during a month. You associate the parent KPI with child KPIs whose scores will roll up to the score for the parent KPI. One child KPI measures the number of units that the production line produces during a month. A second child KPI measures the maintenance costs for a production line during a month.

Each of the child KPIs must be assigned a weight based on their importance, and the sum of all child KPIs assigned for a parent KPI must be equal to 100. The system uses the value assigned for the weight of a child KPI to translate the normal score for a child KPI when rolling the score up to a parent KPI. For example, when calculating the score for the parent KPI, you consider the number of units produced to be more important than the number of maintenance dollars spent. Therefore, you assign a weight of 70 for the number of units produced and a weight of 30 to the maintenance dollars spent.

To define KPI structures:

- 1 Select **Administration > Start Center Setup > KPI Setup**.
- 2 Select the KPI for which to define structures, and then click the **Children** tab. **Total Weight (Must equal 100%)** is automatically populated with the total weight of all child KPIs. If no child KPIs are currently associated with the parent KPI, then **Total Weight (Must equal 100%)** is populated with 0.

Note: You can only associate child KPIs to parent KPIs. You must select **Parent** on the **KPI Codes** form to indicate that a KPI is a parent KPI.

See "Setting up KPIs" on page 116.

- 3 Click **Add Child KPI**.
- 4 Specify this information:

Child KPI

Specify the child KPI component for the parent KPI.

Weight (%)

Specify the weight for the child KPI component to use when calculating the **Current Value** and **Normal Score** for the parent KPI.

Note: The sum of the weight of all child KPI components defined for a parent KPI must be 100%.

- 5 Click **Submit**.

Viewing KPI history

View KPI history to review the results of KPI calculations. A record in KPI history is generated when the score for a KPI is calculated. Updating the KPI is optional.

Note: KPI drivers must be running to populate the **History** page.

You can only view the history of a KPI if you selected **Maintain History** on the **KPI Codes** form.

See "Setting up KPIs" on page 116.

To view KPI History:

- 1 Select **Administration > Start Center Setup > KPI Setup**.
- 2 Select the KPI for which to view history, and then click the **History** tab.
- 3 View the KPI history.

Personalizing charts

In addition to KPIs and inbox entries, the **Start Center** displays charts based on user-defined SQL statements. A chart is a graphical representation of data such as work orders assigned to specific departments.

After defining charts, grant users access to the charts. Charts can either be user-group specific or public. Public charts are displayed for all users. Define system privileges for users to personalize their **Start Center** to display charts based on their preferences.

Setting up charts

Set up and update charts to display in the **Start Center** using SQL statements to define chart data.

To set up charts:

- 1 Select **Administration > Start Center Setup > Chart Setup**.
- 2 Click **New Record**.
- 3 Specify this information:

Chart Code

Enter a unique code identifying the chart, and then enter a description in the adjacent field.

Out of Service

Select to indicate the chart should not display in the **Start Center**.

SQL Statement

Enter the SQL statement which will define the chart data displayed.

Group By Text

Enter the type by which to group the chart data, e.g., for a chart displaying open work orders, enter **Department** to display the open work orders by specific department.

Value Type

Select the value type for which the chart will display data, e.g., select **Number** to display numerical representations of data in the chart.

Public

Select to indicate the chart should be available to all users in the **Start Center**.

- 4 Right-click on the form, and then select **Group By Translations** to view and edit the translations for **Group By Text**.
- 5 Click **Save Record**.

Associating charts with user groups

Associate charts with user groups to enable them to display only the charts that are associated with their user group in the chart list in the **Start Center**.

Note: You can only assign charts to user groups for which **Public** has not been selected on the **Chart Setup** form.

To associate charts with user groups:

- 1 Select **Administration > Start Center Setup > Chart Setup**.
- 2 Select the chart with which to associate user groups, and then click the **User Groups** tab.
- 3 Click **Add User Group**.
- 4 Specify this information:

User Group

Enter the user group to which to associate to the chart. The system automatically populates the user group description.

- 5 Click **Submit**.

Modifying the Overview screen

Modify the layout of the Overview screen. Create, view, and modify widgets for use on the Overview screen. Layout options include selecting the number of columns displayed on the screen. Drop and drag widgets to move them around on the Overview screen.

To modify the Overview screen:

- 1 Select **Operations > Overview**.
- 2 Click **Edit Mode**.
- 3 Click **Add Widget**.
- 4 Specify the type of widget to add in **Type**, and then click **Submit**.
- 5 Click **Options** to configure the widget to show data after adding the widget.

Option	Description
Edit	Select options based on the type of widget specified in Type.
Personalize	Select the color of your preference to personalize the widget.
Refresh	Click to refresh the widget with the new options.
Delete	Click to delete the widget.

- 6 Drag and drop widgets to move them around on the screen.
- 7 Optionally, click **Edit Layout** to modify the layout of the screen. In the Edit Layout popup, specify the **Layout Type**.
- 8 Click **Submit**.
- 9 Click **Exit Edit Mode**.

Configuring exports and imports

Create an export file for KPIs, inbox items, custom fields, copied screens, task plans, job plans, and custom reports using the export configuration feature. Import the files created into another Infor EAM implementation.

Exporting KPIs

Export a set of KPIs to an export file.

To export a set of KPIS to an export file:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Choose one of the following options:

- **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the equipment, and then click **Run**. KPI records that are not **Out of Service** or **Withdrawn** are displayed.
- 3 Select the KPI to export, and then click **Export**.
 - 4 Select the folder in which to save the file, and then click **Save**.

Exporting inbox items

Export a set of inbox items to an export file.

To export a set of inbox items:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Inbox Items** tab.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the equipment, and then click **Run**. Inbox records that are not **Out of Service** or **Withdrawn** are displayed.
- 4 Select the inbox item to export, and then click **Export**.
- 5 Select a folder to save the file, and then click **Save**.

Exporting custom fields

Export a set of custom fields to an export file.

To export a set of custom fields:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Custom Fields** tab. No records are displayed until you conduct a search.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.

- **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the equipment, and then click **Run**. Only custom field records that are not **Out of Service** or **Withdrawn** are displayed.
- 4 Select the custom field to export, and then click **Export**.
 - 5 Select a folder in which to save the file, and then press **Save**.

Exporting Flex SQL statements

Export a set of Flex SQL statements to an export file.

To export Flex SQL statements:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Flex SQL** tab.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the equipment, and then click **Run**.
- 4 Select the Flex SQL statement to export, and then click **Export**.
- 5 Select a folder in which to save the file, and then press **Save**.

Exporting web service prompts

Export a set of web service prompts to an export file.

To export a set of web service prompts:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Web Service Prompts** tab. Records are not displayed until you conduct a search.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes, and then click **Run**.

- 4 Select the web service prompt to export, and then click **Export**.
- 5 Select a folder to save the file, and then click **Save**.

Exporting custom reports

Export a set of custom reports to an export file.

To export a set of custom reports:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Custom Reports** tab.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the report, and then click **Run**.
- 4 Select the custom report to export, and then click **Export**.
- 5 Select a folder in which to save the file, and then press **Save**.

Exporting user defined grids

Export a set of user defined grids to an export file.

To export a set of user defined grids:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export User Defined Grids** tab. Records are not displayed until you conduct a search.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes, and then click **Run**.
- 4 Select the user defined grid to export, and then click **Export**.
- 5 Select a folder to save the file, and then click **Save**.

Exporting alerts

Export a set of alerts to an export file.

To export a set of alerts:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Alerts** tab. Records are not displayed until you conduct a search.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes, and then click **Run**.
- 4 Select the alert to export, and then click **Export**.
- 5 Select a folder to save the file, and then click **Save**.

Exporting screens

Export a set of copied screens and the associated configuration details such as screen designer changes to an export file.

To export screens:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Export Copied Screens** tab.
- 3 Choose one of the following options:
 - **Dataspy**
Select an existing Dataspy or edit an existing Dataspy.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the report, and then click **Run**.
- 4 Select the copied screens to export.
- 5 Specify the **Screen Designer User Group**. This will determine the screen designer options available to export.
- 6 Click **Export**.
- 7 Select a folder in which to save the file, and then press **Save**.

Exporting task plans and job plans

Export a set of task plans and job plans including the associated jobs and other details to an export file.

To export task plans and job plans:

- 1 Select **Administration > System Configuration > Export Configuration**.
- 2 Click the **Task Plans** tab.
- 3 Choose one of the following options:
 - **DataspY**
Select an existing DataspY or edit an existing DataspY.
 - **Quick Filter**
Define a quick filter to filter the list of records in the lookup based on the key fields and many attributes of the report, and then click **Run**.
- 4 Select the task plans to export.
- 5 Click **Export**.
- 6 Select a folder in which to save the file, and then press **Save**.

Importing files

Import KPIs, custom fields, inbox item files, Flex SQL statements, copied screens, task plans, job plans, and custom reports created using the Export Configuration feature.

To import files:

- 1 Select **Administration > System Configuration > Import Configuration**.
- 2 On the **Import** tab, click **Browse**, and then select the file to import from the file location.
Note: Click **View File Contents** to view the file details.
- 3 Click **Import**.

Uploading documents in a batch for import configuration

Upload multiple documents that belong to a specific organization.

To upload documents in a batch for import configuration:

- 1 Select **Administration > System Configuration > Import Configuration**.
- 2 Click the **Batch Document Upload** tab.
- 3 Specify the **Organization** to which the uploaded documents will belong.
- 4 Click **Add**.

- 5 Select the files to upload, and then click **Upload**.
- 6 Click **Refresh**. All records are removed from the grid.

Exporting base configuration

Export a large number of configuration items to specially formatted files.

To export base configuration:

- 1 Select **Administration > System Configuration > Configuration Manager**.
- 2 Select one of the following options:

- **Save on Client**

Select to save the files on the client's machine. **Path** is automatically populated on the server where the file will be initially saved.

Note: The export process may take a while to successfully process and the system could timeout during the process. If this happens, click the **Status** tab to check the results of the import.

- **Save on Server**

Select to save the files on the server.

Email Address

Specify the email address to which to have email notifications sent when the configuration process is complete.

Include file in Email

Select to receive a second email with the file attached. **Path** is automatically populated on the server where the file will be initially saved.

Note: Click **Select All** to select all of the export options.

- 3 Specify this information:

User Groups and Permissions

Select to export user groups and their permissions, including hyperlinks, screen designer changes, and menus.

Export Single User Group

Specify a single user group to export. Only permissions for this user group will be included in the export file.

Status Authorizations

Select to export status authorizations.

Users

Select to export users and their related organizations, including personal Dataspies and report filters.

Organizations

Select to export organizations.

Multi-org Security

Select to export multi-org security.

Install Parameters

Select to export install parameters.

Closing Codes

Select to export closing codes.

Trades

Select to export trades.

Audit Setup

Select to export audit setup.

Screens and Reports

Select to export screens and reports, including changes made to existing screens and any new screens. New reports are not included.

Departments

Select to export departments.

Locales

Select to export locales.

Category

Select to export categories.

Reliability Ranking

Select to export reliability ranking values.

Custom Fields

Select to export custom fields, including classes.

Flex SQL

Select to export Flex SQL.

Updated Text

Select to export updated text.

System Codes

Select to export system codes.

Mobile

Select to export Infor EAM Mobile configuration settings.

Include Translations

Select to include translations in the export.

Messenger Setup

Select to export messenger setup.

KPIs and Inboxes

Select to export KPIs and Inboxes.

Account Detail Setup

Select to export account detail setup.

eRecord Setup

Select to export eRecord Setup.

Web Service Prompts

Select to export web service prompts.

Call Center Setup

Select to export call center setup.

Data Collection Setup

Select to export data collection setup.

eRecord Setup

Select to export eRecord Setup.

Email Setup

Select to export email setup.

Alerts Setup

Select to export alerts setup.

- 4 Click **Export**.
- 5 Select the folder in which to save the file, and then click **Save**.

Importing base configuration

Import files created by the Configuration Manager.

To import base configuration:

- 1 Select **Administration > System Configuration > Configuration Manager**.
- 2 Click the **Import Base Configuration** tab.
- 3 Select one of the following options:
 - **Do Not Wait for File to be Imported**
Select to execute the import without waiting for the system to complete the process.

Note: To check the results of the Import, click the **Status** tab.

- **Wait for File to be Imported**

Select to execute the import while waiting for completion.

Note: The import process may take a while to successfully process and the system could timeout during the process. If this happens, click the **Status** tab to check the results of the import.

4 Specify this information:

File Location

Specify the location of the file created during the Export process. Click **Browse** to locate the file.

Note: Click **View File Contents** to view the contents of the file.

Notification Email Address

Specify the email address to which the system sends email notification once the process is complete.

5 Click **Import**.

Viewing the status of imports and exports

View the status of all imports and exports performed on the system as well as the history of imports and exports.

To view the status of imports and exports:

1 Select **Administration > Setup > Configuration Manager**.

2 Click the **Status** tab.

Note: **File Path** is a hyperlink that can be used to download an export file once it has been successfully created.

3 Select the record for which to view status details, and then click **View Status Details**.

4 Select the group for which to view error details, and then click **View Error Details**.

5 View the error details.

6 Click **Close**.

7 Click **Close**.

Screen designer

Modify the page layout of record view, detail view, and list-detail view pages. You can move fields, modify the display type of fields, and rename field labels.

Using screen designer keyboard shortcuts

Keyboard shortcuts are keys or key combinations for system functions. The following keyboard shortcuts allow easy access to screen designer functions while in designer mode.

Table 1: Screen designer keyboard shortcuts

Function	Shortcut
Switch to screen designer mode	ALT+E
Save layout	CTRL+S
Open group selection	CTRL+G
Switch to preview mode to view layout of screen with hidden fields removed, and without saving changes on the screen/returning to normal mode	ALT+W
Exit screen designer mode	CTRL+I

Displaying pages in screen designer mode

Modify the page layout of record view, detail view, and list-detail view pages. You can move fields, modify the display type of fields, and rename field labels.

To display pages in designer mode:

- 1 Open any record view, detail view, or list-detail page.
- 2 Click **Screen Designer**.
- 3 Specify this information:

Copy from Group

Select the group from which to copy the screen layout.

Save to Group

Select the group to which to save the screen layout.

Note: To save the screen layout to multiple user groups, click **Advanced**.

- 4 Click **Continue**.

Moving fields in screen designer mode

Move fields from one container to another container or move fields within the same container. In designer mode, a container is indicated by a red dotted line.

Note: Only custom fields associated to a * **Class** and * **Organization** can be moved to another block.

To move fields:

- 1 Display the selected page in designer mode.

See "Displaying pages in screen designer mode" on page 133.

- 2 Click the field to move, and then drag the field to the desired location.

Note: When dragging a field to the desired location, the field is always inserted below the field onto which it was placed.

To move a field to the first field position, you must drag the field onto the current first field, and then move the current first field down.

- 3 Click **Save**.

Modifying field display properties

Change the display properties for fields as necessary. The system uses five field properties: Required, Protected, Optional, Hidden, and Not Available.

To modify field display properties:

- 1 Display the selected page in designer mode.

See "Displaying pages in screen designer mode" on page 133.

- 2 Right-click the field to modify.

Note: All five of the field properties are NOT available for all fields.

- 3 Choose one of the following field property options:

- **Required**
Select to indicate that the field is required.
- **Protected**
Select to indicate that the field is read-only.
- **Optional**
Select to indicate that the field is not required.
- **Hidden**
Select to indicate that the field is not shown in detail mode but is always displayed in list view and is still available.
- **Not Available**
Select to indicate that the field should not be displayed in detail or list views.

- 4 Click **Save**.

Modifying field labels

Change the labels used for fields as necessary.

Note: Changes to field labels apply to ALL user groups.

To modify field labels:

- 1 Display the selected page in designer mode.
See "Displaying pages in screen designer mode" on page 133.
- 2 Right-click the field to modify, and then select **Edit Field Names**.
Note: When the state of a field is changed to **Not Available**, **Protected**, or **Hidden**, the system clears any default value that was previously defined for the field.
- 3 Modify the current field label as necessary.
- 4 Click **Done**.

Modifying block display properties

A block of fields is indicated by a title in red and a blue line separating a group of fields from other groups of fields. In the example below, the blocks of fields are titled Equipment Details, Tracking Details, Part Association, Hierarchy, and Custom Fields. Hide entire blocks of fields as necessary.

To modify block display properties:

- 1 Display the selected page in designer mode.
See "Displaying pages in screen designer mode" on page 133.
- 2 Right-click inside the block to modify (NOT inside a red container).
- 3 Choose one of the following block property options:
 - **Show Block**
Select to display the entire block of fields.
 - **Hide Block**
Select to hide the entire block of fields.
- 4 Click **Save**.

Modifying block labels

Change the labels used for blocks of fields as necessary.

Note: Changes to block labels apply to ALL user groups.

To modify block labels:

- 1 Display the selected page in designer mode.
See "Displaying pages in screen designer mode" on page 133.
- 2 Right-click the block to modify.
- 3 Choose **Edit Block Name**.
- 4 Modify the current block label as necessary.
- 5 Click **Done**.

Modifying link and generic button display properties

Change the display properties for links and generic buttons as necessary. Generic buttons are those that are common across many forms, such as **Submit** and **Clear**.

To modify link and generic button display properties:

- 1 Display the selected page in designer mode.
See "Displaying pages in screen designer mode" on page 133.
- 2 Right-click the link or button to modify.
- 3 Choose one of the following link or button property options:
 - **Enable Link/Button**
Select to enable the link or button.
 - **Disable Link/Button**
Select to disable the link or button.
 - **Edit Link/Button Name**
Select to edit the link or button label name.
- 4 Click **Save**.

Modifying function button display properties

Change the display properties for function buttons as necessary. Function buttons are those that perform a procedure or open a popup, such as Create WO on the **Assets** form.

To modify function button display properties:

- 1 Display the selected page in designer mode.
See "Displaying pages in screen designer mode" on page 133.
- 2 Right-click the button to modify.
- 3 Choose one of the following button property options:

- **Show Button**
Select to display the button.
- **Hide Button**
Select to hide the button. If you select to hide a button, the right-click option is still available.
- **Not Available**
Select to disable the button. If you select to make a button Not Available, then both the right-click option and the button are hidden.

4 Click **Save**.

Modifying link and button labels

Change the labels used for links and buttons as necessary.

Note: Changes to link and button labels apply to ALL user groups.

To modify link and button labels:

- 1 Display the selected page in designer mode.
See "Displaying pages in screen designer mode" on page 133.
- 2 Right-click the link or button to modify.
- 3 Choose **Edit Link/Button Name**.
- 4 Modify the current link or button label as necessary.
- 5 Click **Done**.

Defining grids

Create a new grid or copy an existing grid and modify the grid definition. A grid can be added to the menu as a new screen or as a tab on another form.

Note: To define grids that all users can see, you must be logged in as the R5 user.

To define grids:

- 1 Select **Administration > Screen Configuration > Grid Designer**.
- 2 Click **New Record**.
- 3 Specify this information:

Grid Name

Specify the name of the grid, and then specify a description in the adjacent field.

Note: Names of List type grids must be six characters in length, with 'U' as the second letter. Names of Tab type grids must be three characters in length and begin with 'X'.

Copy From

Specify an existing grid to copy. **Description, Grid Type, Parent Screen, Parent Screen description, FROM Clause, WHERE Clause,** and **SELECT Statement** are automatically populated.

Grid Type

Choose one of the following options:

- **List View**
- **Tab**
- **Alert Management**

Parent Screen

Specify the parent screen for the grid if the new grid will be added as a tab on an existing form if **Grid Type** is selected. The parent screen description is automatically populated.

FROM Clause

Specify the FROM Clause for the grid, including each table and table alias.

SELECT Statement

Specify the SELECT Statement for the grid. On the **Record View** page, fields can be selected only from the lookup. To modify the fields selected or to add fields and functions expressions individually, click the **Fields** tab.

WHERE Clause

Specify the WHERE Clause for the grid, including parameters as necessary.

Custom Field Table

Specify the custom field table used for the dataspj lookup for the grid if custom field selection is enabled.

Active

Active is selected if the grid has been validated on the **Validation** page.

- 4 Optionally, select the **Enable Custom Field Selection in Dataspy** check box to enable custom field selection in the dataspy for the grid.
- 5 Optionally, select the **Mobile Grid** check box to set the grid as a Mobile grid on the **Record View** page.
- 6 Optionally, select the **GIS WO Attribute Mapping Grid** check box to allow work order fields defined on this grid to be associated to GIS event attributes, which enables EAM work order data to be synchronized in the GIS map display.

Note: This feature is only available when using LRS (Linear Referencing System) enabled map services.

The Map Attributes popup on the Infor EAM toolbar inside the ArcMap application is used to associate work order UDG fields to GIS event attributes.

- 7 Click **Save Record**.

Defining fields for grids

Define fields for grids to modify the SELECT statement for the grid. Fields in the SELECT statement can be true fields or function calls (including parameters).

To define fields for grids:

- 1 Select **Administration > Setup > Grid Designer**.
- 2 Select the grid for which to add fields, and then click the **Fields** tab.
- 3 Click **Add Field**.
- 4 Specify this information:

Field

Specify the field to add to the grid.

Note: Lookup Dataspies allow you to choose the following:

- fields from the tables in the FROM clause
- any fields in the whole database including any you created
- functions

Alias

Specify the alias for the field.

Note: Field **Alias** can include only letters, numbers, and '_'. The same **Field** can be added twice if it appears in two different tables, but only with a different field alias each time.

Header Location

Choose one of the following options to display a field in the header section above the grid:

- **None**
- **Code**
- **Description**
- **Header 1**
- **Header 2**
- **Header 3**

Field Label

Specify the label for the field.

Data Type

Choose one of the following options:

- **Upper Case**
- **Mixed Case**

- **Numeric**
- **Date**
- **Currency**
- **Decimal**
- **Date/Time**
- **Duration**
- **Time**
- **Boolean**
- **Long**
- **Dependent**

Lookup Entity

Specify the entity used to populate the Dataspy lookup for the field. The system automatically populates entity description.

Lookup Query

Specify the query used to populate the Dataspy lookup for the field. The system automatically populates **Lookup Query Text**.

Grid Key

Select to identify the field as a key field for the grid.

5 Click **Submit**.

Note: To create a hyperlink to a screen for this field, click **Add/Edit Hyperlinks**.

See "Setting up hyperlinks" on page 142.

Defining parameters for grids

Map parameters to fields on parent screens for user-defined grids with **Grid Type = Tab**. This tab shows both system parameters and user-defined parameters from SELECT and WHERE statements.

To define parameters for grids:

- 1** Select **Administration > Setup > Grid Designer**.
- 2** Select the grid for which to define parameters, and then click the **Parameters** tab.
- 3** Select a parameter to map to the parent screen. The system automatically populates **Parameter, System**, and **Data Type**.
- 4** Specify this information:

Parent Grid Field

Enter the parent screen field for the parameter. For example, map parameter :wonum to **WO No.** on the **Work Orders** form when adding a new tab with child records to that form.

5 Click **Submit**.

Defining validation for grids

Define a default Dataspy for a grid, and then mark the grid as active.

To define validation for grids:

- 1 Select **Administration > Setup > Grid Designer**.
- 2 Select the grid to validate, and then click the **Validation** tab.
- 3 Click **Create Default Dataspy**. The system validates the full query statement for the grid record and creates the default dataspy for the new grid as "All records".
- 4 Specify this information:

Active

Select to validate the grid definition and make the grid available for use.

Note: If you unselect **Active**, the system saves the record and makes the grid inactive.

Defining and generating views

Use relational database views to expand the complexity and functionality of user defined grids in EAM. Define these database views by specifying a unique view name and a SQL statement. Generate these views to make them available for use with Grid Designer. Unlike user defined grids in EAM, views allow you to use outer joins and unions to combine data from two or more tables.

To define and generate views:

- 1 Select **Administration > Screen Configuration > Views**.
- 2 Click **New Record**.
- 3 Specify this information:

View

Specify a unique code value to identify the view database record, and then specify a description of the new record in the adjacent field.

View Name

Specify a unique which will be used as a reference on user defined grids. All view names must begin with **U5**.

SQL Statement

Specify the SQL statement query to generate the searchable object or database view.

- 4 Click **Save Record**.
- 5 Click **Generate** to run the **Test SQL** process and generate the new database view. If the view is generated successfully, the **Active** check box is selected, and the view is ready for use with Grid Designer.

Setting up hyperlinks

Create or edit hyperlinks to connect a form to another form. Hyperlinks allow access to related forms or reports from a link on the original form.

To set up hyperlinks:

- 1 Open an Infor EAM form.

Note: You may also set up hyperlinks on the **Fields** tab of the **Grid Designer** page.

- 2 Select a record, and then click the **Record View** tab.
- 3 Click **Screen Designer**.
- 4 Right-click in a field, and then choose **Hyperlink**. The system automatically populates **Source Screen Name** and **Source Field Name**.
- 5 Specify this information:

Hyperlink

Enter a unique name for the hyperlink.

Destination Screen Mode

Select to set hyperlink as query pages or to set hyperlinks to display in insert mode.

Destination Screen/Report

Enter the name of the hyperlink screen or report. The system automatically populates the destination screen/report description.

Note: If you select a report for **Destination Screen/Report**, the system empties and protects **Default Dataspy**. The system also selects **Query** for the Destination Screen Mode and protects the Destination Screen Mode options.

Destination Field

Select the field for which to create a hyperlink.

Sequence Number

Enter the sequential order for the hyperlink.

Default Dataspy

Select the global dataspy for the hyperlink.

- 6 Click **Submit**.

Using screen designer for web service prompts

Modify the layout of screens and properties of web service prompt fields. In addition, you can select the groups for which the changes apply. While tab sequence and display properties are established

initially on the **Fields** page for Web Service Prompts, fields can be moved around the screen and display types can be changed using the screen designer feature.

See the *Infor EAM User Guide*.

Note: Re-sequencing fields via screen designer may cause the prompt to function differently than the administrator originally intended. Exercise caution when re-sequencing fields via screen designer.

The following functionality is specific to screen designer for web service prompts:

- 1 If you have access to the screen designer feature on system delivered screens, you also have access to screen designer on web service prompt screens.
- 2 Make screen design changes with caution as certain changes can adversely affect the intended behavior of the screen. For example, if you move a controlling organization or class/class organization field to the bottom of a prompt, the system may not display any class-specific custom fields until the entire prompt has been navigated.
- 3 Any field-level changes on the **Web Service Prompt Definition** form overwrite the corresponding field on the **Prompt** form for all groups when the screen is next opened, regardless of changes made via screen designer. For example, creating and updating prompt definitions impact the corresponding screen for all user groups.
- 4 Hyperlinks are not available.
- 5 "User Defined Field Options" and "User Defined Field Lookup Values" right-click options are not available.
- 6 The "Not Available" attribute is not available.
- 7 The "View Field Details" option is not available.
- 8 When editing field names, translating to other languages is not available.
- 9 Lookup Filters can be applied only to user defined fields. In addition, the user defined field must have the lookup defined on the base screen for which the web service is related.
- 10 There is no web service prompt screen designer option for links and generic buttons as these cannot be displayed on a web service prompt-based screen.

Defining web service prompts

Define web service prompts representing web services and fields rendered on the user-defined screen using the Web Services Prompt Engine. System administrators can use web services to create user-defined screens for use within Infor EAM. Web service prompts contain the definitions for these screens.

The following rules apply to forms for which web service prompts are available:

- The system displays the functions of all system-delivered Infor EAM **List View** and **Record View** pages.
- BSCOMM (Comments) is displayed.
- No user-created screens are available.

The system displays all screens meeting the above criteria if a web service has not been specified; otherwise, only screens related to the web service will be displayed.

To define web service prompts:

- 1 Select **Administration > Web Service Prompt Engine > Web Service Prompts**.
- 2 Click **New Record**.
- 3 Specify this information:

Web Service Prompt

Enter a unique code for the web service prompt, and then enter a description of the prompt in the adjacent field.

Out of Service

Select to indicate the web service prompt is out of service.

- 4 Click **Save Record**.

Note: The system automatically creates a screen record whose code and description correspond with the web service prompt. The user-defined screen can now be placed into the menu for one or more user groups. These new screens are not visible on the **Screens** form.

Defining web services for web service prompts

Define the Infor EAM web services available for use on the user-defined screen representing the selected web service prompt.

To define web services for web service prompts:

- 1 Select **Administration > Web Service Prompt Engine > Web Service Prompts**.
- 2 Select the web service prompt for which to define web services, and then click the **Web Services** tab.
- 3 Click **Add Web Service**.
- 4 Specify this information:

Screen

Enter the screen for which to define web services details. The system automatically populates the screen description.

Tab

Enter the tab to be specified for the selected screen. The system automatically populates the tab description.

Note: Tab should be left blank if the web service is to be based on the Record View of the selected Screen.

If the Comments **Tab** is selected, the system replaces the selected **Screen** with BSCOMM and clears the **Tab** value because the insert, update, and delete Comment web services do not actually reside on the **Comments** tab. These web services exist on the Comments pop-up (BSCOMM), a screen within Infor EAM. Because Comments are generic and can apply to many screens, the

Entity and **Record** for which the Comments are related need to be entered when inserting, updating, or deleting Comments using the Web Service Prompt Engine. The system administrator can make the **Entity** field 'fixed' via **Field Type** and supply the correct **Entity** value so that it is not necessary to enter it with each Comment record. In addition, the **Entity** field can be 'protected' via Display Type so that users can only enter Comments for the appropriate **Entity**.

Action Code

Select the action code for the selected screen, e.g., insert, update, delete.

Process Group

Enter the process group for the selected screen. Fields related to the lowest process group will be displayed first on the Web Service Prompt Engine, and so on. The default value for this field is based on the INCRLINO installation parameter.

Web Service

Enter the web service for the selected screen.

Note: The system defaults the **Web Service** if only one **Web Service** exists for the **Screen, Tab,** and **Action Code**.

If you enter the **Web Service** without entering **Screen, Tab,** and **Action Code**, the system populates **Screen, Tab,** and **Action Code** when the Web Service is selected.

- 5 Click **Submit**. The system automatically creates a field record on the **Fields** tab for each controlling organization in the selected web service. **Controlling Org.** will be selected for these records.

Note: In determining the sequence for **Controlling Org.** for each process group/web service, the system multiplies the value in the WSPFSEQ parameter by the web service process group. This new parameter will be used as a multiplier to ensure adequate field sequence separation between web services defined for the prompt allowing users to add the remaining prompt fields as necessary. The default value for this parameter is 100.

Defining fields for web service prompts

Add, update, or delete fields for each web service that will be available on the Web Services Prompt.

Fields available for use will be those related to the web services defined on the **Web Services** page of the **Web Service Prompts** form.

Note: This form contains no capability for defining language translations for field labels displayed. When the prompt is executed, field labels display as entered on the **Fields** form for the selected web service prompt. To display prompts in multiple languages, a separate Web Service Prompt must be created for each language.

User defined fields are available for web service prompts. The fields display in a list of all fields under the appropriate web service for some insert/update web services. These user defined fields inherit properties from the associated reference form. Right-click in Screen Designer mode to define options for user defined fields. When you highlight a user defined field in the grid, the system protects **Field**

Type and **Query Code**. This information is defined on the base screen for which the web service is related.

See the *Infor EAM User Guide*.

Entity lookup user defined fields show records for all organizations in the user's organization list when a controlling organization is not available. A record cannot be submitted if the controlling organization and the user defined field organization are in conflict.

To define fields for web service prompts:

- 1 Select **Administration > Web Service Prompt Engine > Web Service Prompts**.
- 2 Select the web service prompt for which to define fields for web services, and then click the **Fields** tab.
- 3 Click **Add Field**.
- 4 Specify this information:

Process Group–Web Service

Specify the process group for which to add the web service field. **Screen** and **Tab** are automatically populate.

Field

Specify the field to add to the process group. Available fields are based on the selected web service.

Field Label

Specify the name for the field. This information will be displayed as the field boiler text for the Web Services Prompt Engine. The default **Field Label** is equivalent to the **Field**.

Field Type

Specify the field type based on the selected field and web service. The default **Field Type** is the system-delivered type for the selected **Field**. However, you may change this value. The user-defined **Field Type** is displayed on the Web Service Prompt Engine. You can change the default to one of the following options:

- **Alphabetic**
- **Computed**
- **Date**
- **Fixed**
- **Free format text**
- **Key Field**
- **Numeric**
- **Retrieved Field**

Note: **Key Field** is available only when an "update" or "delete" web service is selected. When setting up a web service prompt that uses an update or delete web service, the system administrator must create a **Field** for each key field the web service requires to uniquely describe a record. **Field Type** should be Key Field. The web service prompt engine first prompts you to enter the key field value(s) for the record to process, such as **Equipment** and **Equipment Organization**. For updating web services, the system queries for the record to display the results. You may update and then

submit the record. For deleting web services, after you enter all key field values, the system deletes the record.

Retrieved Field is available only when an "insert" web service is chosen. When setting up a web service prompt that uses an insert web service, one or more key field values must be retrieved from a web service previously processed in the current prompt record. The administrator needs to create a **Field** of type Retrieved Field for each of the key fields. For example, a web service prompt is created that allows you to create a work order and an activity for the work order simultaneously. You want the activity to be associated with the work order that is created in a previous process group; however, the data will be entered into the web service prompt engine and processed simultaneously. To ensure the activity is associated with the correct work order, the system must first process the "insert" work order web service, then pass (retrieve) the work order number and work order organization back to the create activity web service. This key field information, along with other required activity data, is used to create the activity and relate it to the proper work order. Retrieved Field (Field Type = Retrieved Field) records would be created for the activity work order number and activity work order organization because the work order number and organization are required to associate the activity.

Retrieve From Group–Web Service should be populated with the web service from which these key field values are retrieved. In this example, they are retrieved from the "insert" work order web service. **Retrieve Field** will be the key field in the retrieve from web service from which the data is retrieved. In this example, **WO Number** is one of the retrieved fields. Another **Field** should be created similarly to define how to retrieve the work order organization for use in creating the activity. Field values can only be retrieved from web services with a lesser process group number. For example, a value cannot be retrieved for use in the current web service unless a previous web service was processed to provide the information.

Retrieved Field and **Key Field** are not available when **Unmapped** is checked.

Retrieved Field Type is not associated with the functionality available on the **Retrieved Values** page.

If a field is defined as Checkbox, it appears as a checkbox on the **Web Service Prompt Engine** page.

Display Type

Specify how the field will be displayed using the Web Service Prompt Engine. The default value will be the system default for the selected field. The user can change the default to one of the following options:

- **Optional**
- **Required**
- **Hidden**
- **Protected**

Note: If **Field Type** is Fixed or Computed, only Protected and Hidden will be available for **Display Type**. If **Field Type** is Retrieved Field, only Hidden will be available for **Display Type**.

Sequence

Specify a numeric value for the sequence. Fields are displayed using the Web Service Prompt Engine in ascending order by their Sequence. The default value provided by the system is based on the INCRLIND parameter.

Note: It is important to ensure that the web service prompt fields are displayed grouped together, using the Web Service Prompt Engine, by **Process Group–Web Service**. The **Sequence** range available is controlled for fields for the selected **Process Group–Web Service**. The **Sequence** must not overlap with a **Sequence** associated with a previous or subsequent process group. For example, web service prompt fields are grouped on the Web Service Prompt Engine by **Process Group–Web Service**, then by **Sequence**.

Minimum Length

Specify the minimum number of characters for the field.

Maximum Length

Specify the maximum number of characters for the field.

Next Sequence

Specify the number at which to begin the next sequence.

Query Code

Specify the query code. The **Query Code** defines values available for selection in a list of values field when a server connection is available. For example, the query and list of available values will be based on the Infor EAM tables.

Mobile Query Code

Specify the mobile query code that defines a list of values that is available for the field.

Note: The mobile device uses the Query Code list of values if an application server connection exists; otherwise, the Mobile Query Code list of values is used. For example, local data populates the list of values.

Retrieve Field

Specify the name of the field from which to retrieve data. The system automatically populates

Retrieve From Group–Web Service and **Retrieve Field X-Path**.

Query Web Service

Specify the query web service. A **Query Web Service** applies only when defining key field for an "update" web service. The **Query Web Service** is used to query the data in the record to display to the user for possible updates.

Unmapped Field

Select if specified field is not mapped to any field in web service. The field value can then be processed further by the Prompt as part of a calculation or retrieved values.

Use Previous Value

Select to use the previous field value.

If Data Is

Specify the **Go To** condition. This field describes the condition in which the system does not access the field defined by **Next Sequence** but instead places focus on the **Go To Sequence**.

Pattern

Specify the pattern that should be met for the **Go To** condition.

Go To

Specify the field sequence that the system will follow, versus **Next Sequence**, if the condition is met.

Clear Previous Values Starting From Go To Target Field

Select to enable the system to carry forward values for fields with **Use Previous Value** selected, when the prompt sequence is less than (<) the "Go To" target field sequence. For example, previous values for prompt fields >= "Go To" target field sequence will be cleared. Otherwise, the system will carry forward values for fields with **Use Previous Value** selected, when the prompt sequence is less than (<) the "Go To" source field sequence. For example, previous values for prompt fields <= "Go To" source field sequence will be cleared).

Retrieve From Group–Web Service

Specify the web service from which key field values will be returned and used in a subsequent process group.

Computed Data

Specify the computed data for the field when **Field Type** is **Computed**.

Pattern Match

Specify a pattern for **Field Type** of **Alphabetic** for which entered data must match in order to be valid.

Note: The following "wild card" characters are supported when defining a **Pattern Match**:

- . (period): single alphabetical characters, A through Z
- # (pound sign): any single number, 0 through 9
- _ (underscore): any single alphanumeric character, A through Z and 0 through 9
- % (percent): a string of alphanumeric characters
- , (comma): OR condition
- : (colon): THROUGHOUT condition
- ! Any character(s) or numbers(s): data entered should not match what follows the "!" NOT condition.

See "Defining retrieved values for web service prompts" on page 150 for more information on referencing the prompt field inside SQL statements contained within **Query Code**, **Mobile Query Code**, and **Computed**.

5 Click Submit.

Note: To remove a field, select the field to remove, and then click **Remove Field**. Fields corresponding to the **Controlling Organization** for a web service cannot be removed from this page because they are critical to processing the web service. However, if the web service itself is removed from the **Web Service** page, all related fields are automatically removed including **Controlling Organization**.

Note: Errors are not displayed on this page if all necessary required, key, or retrieved fields are not defined for the web service prompt to function properly using the Web Service Prompt Engine. An error is displayed when the Web Service Prompt Engine processes records with insufficient prompt

fields. An error is also displayed from the Web Service Prompt Engine if a next sequence is defined that does not exist within the prompt definition.

Defining retrieved values for web service prompts

Create, edit, and delete retrieved values for a web service prompt. Values can be retrieved from the database and automatically populated into the **Destination** field when you enter data into the **Source** field. Using retrieved values saves data entry time and prevents potential key stroke mistakes.

A good example for using retrieved values would be when an employee regularly creates a work order and activity for which they will complete. When the employee enters his or her user name for the work order Created By field, the system can locate the employee associated with the entered user name and populate that employee's **Trade** on the activity automatically.

Note: Setting up retrieved values requires identifying the **Source**, the **Destination**, and the **SQL Statement** used to query the information related to the supplied data. SQL statements can be defined on the **Queries** screen.

To define retrieved values for web service prompts:

- 1 Select **Administration > Web Service Prompt Engine > Web Service Prompts**.
- 2 Select the web service prompt for which to define retrieved values, and then click the **Retrieved Values** tab.
- 3 Click **Add Retrieved Value**.
- 4 Specify this information:

Source

Enter the source field sequence. The system automatically populates the source description.

Destination

Enter the field sequence for which to populate the retrieved data. The system automatically populates the destination description.

Query Code

Enter the query code on which the retrieved value will be based. The system automatically populates **SQL Statement**.

Note: The system allows referencing other prompt fields inside the user-defined SQL statement. The syntax is " :<prompt sequence #> ". For example, if you want to reference a prompt field whose Sequence = "2" inside the 'where' clause of their SQL statement, enter " :2 ".

- 5 Click **Submit**.

Copying web service prompts

The copy web service prompt feature copies a web service prompt, including all details.

To copy web service prompts:

- 1 Create a web service prompt.
See "Defining web service prompts" on page 143.
- 2 Right-click, and then select **Copy Web Service Prompt**.
- 3 Specify this information:

New Web Service Prompt

Enter the name for the new web service prompt. The system automatically populates the New Web Service Prompt description.

- 4 Select the record types to copy, and then click **Submit**.

Note: Some exceptions apply to the header details copied.

Out of Service value is not copied.

If the detail record contains a **Query Code** or **Mobile Query Code** that is not valid at the time the record is copied, the system does not copy the record.

Viewing log files

View and save Infor EAM log and configuration files. Saved files are copied to a specified location on the local drive.

To view log files:

- 1 Select **Administration > Setup > View Log Files**.
- 2 Specify this information:

File Type

Choose one of the following options:

- All
- Log
- Configuration

Log Type

Choose one of the following options:

- Ejcron
- Session
- Session List
- Server
- Grid Query
- **Apache**

- Report
- Axis

3 Click **Display Files**.

4 Select the files to save.

Note: If multiple files are selected, the files are automatically compressed and saved as one file.

5 Click **Save**.

6 Select the folder in which to save the file, and then click **Save**.

The data collection module enables you to track the movement of goods for asset and maintenance management. Define queries using existing Infor EAM data or SQL statements. Use transaction prompts to define where and in what order the data collection module populates information in the system. View scanner transactions to be processed and set up predefined jobs. Finally, correct transaction errors.

Note: This chapter describes Infor EAM functions that only a system administrator has rights to perform.

Overview

The data collection module speeds the system acquisition of business information by offering shortcuts in the form of scanned input, minimized operator activity, and system-generated prompts to guide users to accomplish a system function quickly. The data collection module reports on the movements and activities of the organization's equipment, including recording locations and modifications to equipment, thus serving as an audit trail for an asset's lifecycle. The data collection module can be a valuable tool for businesses seeking to take charge of their serialized assets and to enhance their financial reporting on difficult-to-manage item movements.

Defining queries

Define queries using existing Infor EAM data or SQL statements. Use SQL statements to define complex validation queries or validation queries to multiple system tables.

Note: Define this type of validation only if you are familiar with the Infor EAM data model and have a good working knowledge of SQL.

To define queries:

- 1 Select **Administration > Start Center Setup > Queries**.
- 2 Click **New Record**.
- 3 Specify this information:

Query

Specify the code for which to define a query.

SQL Statement

Specify the SQL statement.

Note: To verify the SQL Statement, click **Test SQL**. A message indicating the accuracy of the statement is displayed.

Normal

Select if you want this query to appear in the Normal lookups.

Data Collection

Select if you want this query to appear in the data collection lookups for asset tracking.

Lookup

Select if you want this query to appear in all lookups.

KPI

Select if you want this query to appear in the KPI lookups.

Inbox

Select if you want this query to appear in the Inbox lookups.

Chart

Select if you want this query to appear in the Chart lookups.

Equipment Ranking

Select if you want this query to appear in the Equipment Ranking lookups.

- 4 Click **Save Record**.

Defining transaction prompts

Transaction prompts define where and in what order the data collection module populates information in the system. You can validate incoming data at the field level, as well as at conditional navigation between prompts.

Referring to the data collection diagram, determine what data to enter, in what sequence it should be gathered, and how to group data for processing to Application Programming Interfaces (APIs). Define data prompts for each barcode transaction type.

If you use GIS functionality, you will need to load GIS assets into the system at the system initialization. Ensure that the GISOBJID is manually assigned for each asset you need to integrate during the system initialization. These manually assigned GISOBJIDs must have values in a range of 0 to 100,000,000. The GISOBJID Sequence Generator begins automatically numbering equipment records that are created through Infor EAM or the GIS system with 100,000,001.

Note: You cannot load a GIS asset into the system with a GISOBJID greater than 100,000,000.

For equipment audits, create scanner prompts with the **Interface Type A (Equipment Audits)** and **L (Equipment Audit Lines)**.

To define transaction prompts:

- 1 Select **Administration > Data Collection > Monitor Interface**.
- 2 Open the **Transaction Type** form.
- 3 Click **New Record**. **Forms SQL Code** is automatically populated.
- 4 Specify this information:

Transaction Type

Specify the transaction type for which to define prompts. The transaction type description is automatically populated.

Line

Specify a unique code identifying the prompt/processing definition line within the scanning transaction.

Data Type

Select one of the following options:

- **Alphabetic**
Select for alphabetic characters.
- **Computed**
Select for the system to automatically make a calculation.
- **Date**
Select for the system to prompt for data that has a time component.
- **Fixed**
Select to define a fixed value.
- **Numeric**
Select for numeric characters.

Prompt Description

Specify the prompt as it is to appear on the scanning device.

Choose one of the following options:

- **Fixed for Data Type**
Specify, for Fixed Data, the fixed data value for this prompt. For example, if equipment type will always be Asset, enter A.

- **If you selected Computed for Data Type**
Specify, for Computed Data, the SQL command string used for the calculation. Use `TKD_PROMPTDATA1`, `TKD_PTOMPTDATA2`, etc., to see the relevant column on the tracking transaction table.
- **If you selected Alphabetic for Data Type**
Specify, for Pattern Match, a pattern match. See Step #8 for more information about Pattern Match.
- **If you selected Date for Data Type**
Specify, for Date Format Mask, a date format mask. The date format mask should match the data that is being entered in the data collection upload columns.

Pattern Match

Specify the pattern matching to be performed by the scanner. Pattern characters can include the following values:

- `.` (period)
Represents a single alphabetical character, A through Z
- `#` (pound sign)
Represents any single number, 0 through 9
- `_` (underscore)
Represents any single alphanumeric character, A through Z and 0 through 9
- `%` (percent)
Represents a string of alphanumeric characters
- `,` (comma)
Represents an OR condition
- `:` (colon)
Represents a THROUGH condition
- Any character(s) or number(s)
Indicates that exact character or number in that position
- `!` any character(s) or number(s)
Indicates data entered should not match what follows the "!"

Archive Column

Specify the column where the system archives transaction data.

Interface Type

- A (Equipment audits)
Indicates the equipment audit starting point and designates a batch number

- ADI (Add Details Interface)
Adds comments to a record
- E (Events (work order) interface)
Creates and updates work orders and activities
- H (Booked hrs interface)
Books labor hours on a work order activity
- I (Inventory issues)
Tracks inventory transactions of assets or parts, such as issues, returns, store-to-store movements, etc.
- IRI (Inspection results interface)
Tracks inspection results
- L (Equipment audit lines)
Indicates the equipment audit data
- MANF (Manufacturers interface)
Tracks manufacturer information
- O (Equipments interface)
Tracks assets, hierarchies, and user attributes
- PART (Parts interface)
Creates and updates part information
- PURC (Purchase order interface)
Downloads, creates, and updates purchase orders
- R (P.O. receipt)
Receives assets and parts with or without a purchase order
- READ (Readings interface)
Records meter readings
- REQ (Requisition interface)
Creates and updates requisitions for Goods requested transactions
- S (Stocktake interface)
Enters physical inventory counts
- TOUS (Tool usage interface)
Tracks tool usage information

Group Sequence

Specify the sequence in which to group data collection transactions.

Upload Column

Specify the interface column in which to load the data.

Action Code

Specify the action that the selected interface performs on this data.

Prompt Sequence

Specify the chronological order in which this prompt occurs. Do not skip sequence numbers.

Minimum Length

Specify the minimum number of characters required for the data to enter at the prompt. Enter nothing or 0 to make this prompt optional.

Next Prompt

Specify the next prompt to display on the barcode scanner. The maximum number of digits is eight.

Maximum Length

Specify the maximum number of characters required for the data to enter at the prompt.

Dup. Previous Value

Select to duplicate the previous value of the prompt.

If Data Is

Specify branch conditions, as necessary. Branch conditions include the following values:

- != represents not equal
- < represents less than
- <= represents less than or equal to
- = represents equal to
- > represents greater than
- >= represents greater than or equal to

Note: Infor suggests that you prompt the user once and then use a calculated field for each subsequent time.

Pattern

Specify the pattern of the data collected. You can enter only one pattern.

Go To

Specify the prompt to display if the result of **If Data Is** and **Pattern** is true.

Note: This field is used by Oracle Forms.

Query Code

Specify the query code that defines a lookup for this prompt.

LOV Entity

Specify the entity of the lookup.

Validate File

Specify the filename of an ASCII text file against which to validate entries. The filename must be in DOS format. For example, you can enter a file containing a list of authorized employee codes.

When you enter an employee code, the reader accesses the file and validates the scanned code against the employee list.

Lookup Attached

Select to make the lookup defined by **SQL Code** available. If you do not select this field, data is still validated against **SQL Code**, but the lookup is not available.

Not Available

Select to ensure data entered is not in the lookups.

Override

Select to allow users to enter non-valid data if **Not Available** is unselected or to specify valid data if **Not Available** is selected.

Print Barcode Label

Select to print a barcode label.

Note: This field is used by Infor EAM Mobile.

5 Click Save Record.

Note: Click **Validate** to validate the transaction prompt.

Defining return transaction prompts

Define return prompts to create default values for specific prompts. For example, if creating an inter-warehouse transfer issue with a prompt for requisition number, requisition line, and outstanding quantity, set up a trigger to search and automatically populate outstanding quantity with a value. Define triggers using SQL statements.

To define return transaction prompts:

- 1 Select **Administration > Data Collection > Monitor Interface**.
- 2 Open the **Transaction Type** form.
- 3 Select the transaction type for which to define return prompts, and then click the **Return Prompts** tab.
- 4 Click **Add Return Prompt**.
- 5 Specify this information:

Source Prompt

Enter the number corresponding to the prompt sequence number that triggers the return prompt when you leave or tab out of the field. The system automatically populates the source prompt description.

Target Prompt

Enter the number corresponding to the target prompt sequence number that receives the default value. The system automatically populates the target prompt description.

Note: **Target Prompt** must be greater than **Source Prompt**.

Query Code

Enter the code identifying the SQL statement that calculates the default value for the target prompt. The system automatically populates **SQL Statement**.

6 Click **Submit**.

Entering data with the prompt machine

Enter data into the data collection module with the **Prompt Machine** form instead of a barcode scanner, as necessary. Submit one or more transactions of a selected transaction type.

Note: You must tab through the prompt data fields. You cannot navigate through the form by performing a left-mouse click on a specific field. The only field available for navigation in this manner (by performing a left-mouse click) is **Transaction Type**.

To enter data with the prompt machine:

- 1 Select **Administration > Data Collection > Prompt Machine**.
- 2 Specify this information:

Transaction Type

Enter the transaction type for which to enter data. The system automatically populates the description of the transaction type and displays the prompt data fields associated with the transaction type.

- 3 Click **Add Transaction**.
- 4 Enter data for the prompt data fields as necessary.
- 5 Click **Add to List**.
- 6 Click **Process Transactions**.

Note: If you tab from the current **Prompt Data** to a lower-numbered **Prompt Data**, the system automatically adds the record to the Transactions list, completing the current transaction and beginning a new transaction.

Viewing scanner transactions to be processed

View scanner transactions to be processed. The number of records available to view constantly changes as new records are processed through the system interface.

Note: View and correct any errors on the **Error Correction** page.

To view scanner transactions to be processed:

- 1 Select **Administration > Data Collection > Monitor Interface**.

- 2 View the transaction information.

Setting up jobs

Set up predefined jobs. View and modify jobs. Disable jobs to stop their next scheduled executions or restart previously stopped jobs.

Note: The JobCacheRefreshInterval tag in MPConfiguration.xml controls how often the job information is monitored for changes. By default, the JobCacheRefreshInterval tag checks the jobs every 15 minutes.

To set up jobs:

- 1 Select **Administration > Data Collection > Job Setup**.
- 2 Select the job to set up.
- 3 Specify this information:

Active

Select to enable the job to start at the Next Run date and time.

Note: If you unselect the **Active** check box, the system disables the next execution of the job.

- 4 View the schedule pattern using **Month, Day of Month, Day of Week, Hour, and Minute**. The schedule patterns are typically numeric, but can also include the following characters:

Symbol	Description
* (asterisk)	Matches all days, months, hours, and minutes, e.g., an asterisk in Day of Week indicates that the system performs the job every day of the week.
, (comma)	Separates lists of days, months, hours, and minutes, e.g., 31, 12, 0, 0 represents 12:00 A.M. on December 31.
- (hyphen)	Specifies a range, e.g., 10-12 equals hours 10, 11, and 12.
/ (backslash)	Specifies increments, e.g., 0/15 minutes equals minutes 0, 15, 30, and 45.
L	Indicates the last, e.g., Day of Month=L equals the last day of the month.

See the table below for an example of a schedule pattern:

Month	Day of Month	Day of Week	Hour	Minute	Description
*	*	*	0	5	Run 5 minutes past midnight, every day.
*	*	1-5	22	0	Run at 10:00 P.M. on each weekday.
*	*	*	0-23/1	0	Run each hour, every day.
3-12/3	L	*	1	0	Run at 1:00 A.M. on the last day of each calendar quarter.

5 Click **Submit.Next Run** date and time are automatically populated.

Correcting scanner transaction errors

Correct transaction errors by correcting data prompt values, and then submit the changes to the system database. Save the updated record to resubmit it to the interface for reprocessing. The system automatically reprocesses the correct record when saved.

Note: If a transaction error does not exist for an interface transaction, the system protects all fields.

To correct scanner transaction errors:

- 1 Select **Administration > Data Collection > Monitor Interface**.
- 2 Select the record for which to correct transaction errors, and then click the **Error Correction** tab.
- 3 Enter corrections to the data prompt values to correct the transaction error.
- 4 Click **Save Record**.

This chapter provides installation requirements and procedures for integrating Infor EAM with GIS.

This chapter documents procedures completed in both the Infor EAM and ESRI GIS systems. As a result, section headings include (Infor EAM) or (ESRI), if applicable, to identify in which system the task should be performed.

Note: See "Setting Up Menus for User Groups" on page 88 for information on granting access to the **GIS Map Search** form within Infor EAM.

If you have purchased the GIS module and need to install ESRI, see ESRI's GIS installation documentation.

The Infor EAM-GIS integration supports both the ArcIMS and the ArcGIS server platforms. However, certain aspects of the integration differ slightly between the ArcIMS and ArcGIS platforms. The differences are noted where appropriate within this guide.

Software requirements and pre-installation checklist

- If you previously installed Infor EAM GIS Toolkit in a location other than `C:\inforEAM\GIS`, e.g., you modified the `SETUP.BAT` file supplied on the Infor EAM GIS Toolkit CD, contact Infor Technical Support.
- Install Infor EAM GIS Extensions to integrate Infor EAM with ESRI.
See "Installing or upgrading Infor EAM GIS extensions" on page 164 procedures to install Infor EAM GIS Extensions or to upgrade a previously installed version of the Infor EAM GIS Toolkit to the Infor EAM GIS Extensions.
- If you are upgrading from a previously installed version of the Infor EAM GIS Extensions or are reinstalling to a new location, the Installation Wizard automatically backs up user-created files from the toolbar and help directories. The Installation Wizard saves the `toolbar.bak` and `help.bak` directories in the original installation location.

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Infor EAM supports connectivity with ArcGIS 9.3.1 SP1 and ArcGIS 10.0 SP1. Anytime you upgrade your ArcGIS installation to v10.0 SP1 you are required to perform following steps on the EAM application server for the GIS integration to work correctly:

- 1 Open \depconfig\extended_properties.xml.
- 2 Specify the version number of the ArcGIS server in <gis><version/></gis> tags. E.g., To support ArcGIS server version 10.0, the tags will look like this:

```
<gis>
    <version>10.0</version>
</gis>
```

- 3 Perform redeployment on EAM.

Note: By default, Infor EAM provides support for ArcGIS 9.3.1 SP1.

Installing or upgrading Infor EAM GIS extensions

To install or upgrade Infor EAM GIS Extensions:

- 1 Insert the Infor EAM GIS Extensions CD into the proper drive.
- 2 Choose the folder specific to your version of ArcGIS:
 - **9.3**
Select this folder if you have ArcGIS 9.3.1 SP1 installed on your machine. Execute the GIS93101WN201110.exe file.
 - **10**
Select this folder if you have ArcGIS 10.0 SP1 installed on your machine. Execute the GIS10WN201110.exe file.

Note: See "Software requirements and pre-installation checklist" on page 163.

- 3 Click **Next**.
- 4 Select **I accept the terms of the license agreement** if you agree to the terms, and then click **Next**.
- 5 Verify that the required applications are installed, and then click **Next**.
- 6 Select **Install New Infor EAM GIS Extensions** to install Infor EAM GIS Extensions for the first time or to upgrade to Infor EAM GIS Extensions from a previous version, and then click **Next**.

Note: Select **Add or Remove Infor EAM GIS Extensions** if you have already installed or upgraded to this version of Infor EAM GIS Extensions but want to add or remove individual extensions from your configuration.

- 7 Select the extensions to install. See the following information:

Note: Configuration and Help are required selections.

- **Create Equipment**
Select to install Infor EAM equipment creation within ESRI.

- **Create Work Order**
Select to install the Create Work Order popup.
- **Events**
Select to install the Infor EAM Events popup.
- **Map Feature Attributes**
Select to install the Map Feature Attribute popup.
- **Synchronize Records**
Select to install the Synchronize Records popup.
- **Synchronize Attributes**
Select to install the Synchronize Attributes popup.
- **Data Filter**
Select to install the Data Filter popup.

8 Click **Next**.

9 Enter the directory in which to install the Infor EAM GIS Extensions, and then click **Next**.

10 Review the settings information, and then click Next.

11 Click **Finish**.

Note: If the Infor EAM GIS Extensions are not visible by default in ArcMap, choose **Tools > Customize > Toolbars** from the menu bar, and then select **Infor EAM GIS Extensions**.

Understanding GIS integration

Both Infor EAM and ESRI's GIS should reflect an accurate representation of your company assets. Link Infor EAM equipment records and GIS features with a GIS object identification number (GIS ID in Infor EAM GISOBJID in ESRI).

Note: Both SDE connection and direct connection are supported for the Infor EAM to ESRI GIS integration.

Define user preferences to control how ESRI responds when a user creates new equipment records within Infor EAM and how Infor EAM responds when a user creates new features within ESRI.

ESRI and Infor EAM create and synchronize corresponding equipment/features based on field mappings and GIS profiles. The field mappings and GIS profiles ensure the systems populate accurate attribute data while creating features/equipment.

Field mappings, which are defined at the layer level, allow users to move or copy specific data from one feature to its corresponding equipment record or vice-versa, e.g., map the DISTRICT attribute in

ESRI to the Organization field in Infor EAM. The system populates the equipment record's Organization with the data contained in the DISTRICT attribute for the feature.

See "Defining field mappings for attributes (Esri)" on page 178.

Equipment profiles, which serve as equipment templates, can be related to GIS layers. If an attribute value will be the same for all features in a layer, then the profile can be used to populate this equipment value, e.g., if the Organization of the GIS profile is Org 1, all equipment/features created based on that profile belong to Org 1.

See these topics:

- "Defining preferences for the creation of Infor EAM equipment (ESRI)" on page 181
- "Defining preferences for the creation of GIS features (Infor EAM)" on page 182

Note: During equipment/feature creation, if there are both field mappings and a GIS profile, the system populates fields based on the mappings first. If you do not define a mapping for a field, the system populates the field based on the information defined on the related GIS profile.

If a field mapping for an attribute exists, the system always populates the equipment field based on the data of the attribute, even if the attribute value is empty and the GIS profile value contains data.

The Infor EAM-GIS integration supports both the ArcIMS and the ArcGIS server platforms. However, certain aspects of the integration differ slightly between the ArcIMS and ArcGIS platforms. The differences are noted where appropriate within this guide.

Defining equipment for features defined prior to integration

If you are integrating ESRI and Infor EAM for the first time, move multiple GIS features to Infor EAM through data collection.

Every GIS feature for which you create a corresponding Infor EAM equipment record must have a GISOBJID number.

Note: If you need to integrate a GIS feature with Infor EAM that does not have a GISOBJID field for its layer, you must manually create the field.

See "Creating GISOBJID fields for layers manually (ESRI)" on page 166.

After you manually create the GISOBJID field for each layer you need to integrate with Infor EAM, manually enter a GISOBJID number for each feature within the layer. Numbers that you manually enter must be less than 100,000,000.

Creating GISOBJID fields for layers manually (ESRI)

Infor EAM automatically generates GIS ID numbers once the two systems are fully integrated, but you must manually enter a GISOBJID number in the attribute table of every GIS feature that you want to

move to Infor EAM prior to integrating the systems. For every layer containing GIS features that need to be integrated with Infor EAM manually create a GISOBJID field.

To create GISOBJID fields for layers manually:

- 1 Open ArcMap to an existing map.
- 2 Select the layer for which to add a GISOBJID field.
- 3 Right-click the layer, and then choose **Open Attribute Table**.
- 4 Click **Options**, and then select **Add Field**.
- 5 Specify this information:

Name

Enter GISOBJID.

Note: Enter the name of attribute column headers using all uppercase letters. The system only searches column headers in all uppercase letters when performing a search based on a GIS Filter. See the *Infor EAM GIS User Guide*.

Type

Select Long Integer.

Note: Enter a precision of 9.

- 6 Click **OK**.

Configuring the geoprocessing service for the ArcGIS server

The Infor EAM-GIS integration supports both ArcIMS and ArcGIS Server. When integrating Infor EAM and GIS using ArcIMS server, you must create an Image Service on the ArcIMS Server. See ESRI documentation for more information. If you are integrating Infor EAM and GIS using ArcGIS Server, you must create a Map Service, Geocoding services, and also a Geoprocessing Service. See ESRI documentation for more information on creating these services. You must create the Geoprocessing service using the InforTools.tbx toolbox located in the \arcgisserver\ directory of the Infor EAM GIS product CD.

See "Modifying the GIS installation parameters (Infor EAM)" on page 169 for more information on enabling communications with these mapping services.

Configuring for ArcGIS server version 10.0

To configure the Geoprocessing Service for the ArcGIS server:

- 1 Open the ArcCatalog application.
- 2 Locate the GIS Servers menu, and then select your GIS server.
- 3 Right-click the server, and then choose **Add New Service**.
- 4 Specify this information:

Name

Specify the GIS Service name, e.g., InforTools.

Type

Select **Geoprocessing Service**.

Description

Specify a description for the GIS service as necessary.

Startup Type

Select **Automatic**, and then click **Next**.

Execution Type

Select **Synchronous**.

Toolbox

Locate the InforTools.tbx file on your ArcGIS server.

Note: InforTools.tbx is included on the Infor EAM GIS product CD.

Jobs Directory

Specify the location of the ArcGIS jobs directory.

Output Directory

Specify the location of the ArcGIS output directory.

Maximum Number of Records Returned by Server

Specify the maximum number of records to be returned by the ArcGIS server when running a job.

5 Click **Next**.

6 Select **Enable Web Access**, and then click **Next**.

Note: The value displayed in the **URL** field is the value that must be entered for the GISGPSRV installation parameter.

7 Complete the remaining steps of the Add GIS Service process as necessary, and then click **Finish**.

Configuring for ArcGIS server versions 10.1 and 10.2

To configure the Geoprocessing Service for ArcGIS server versions 10.1 and 10.2:

1 Open ArcMap 10.1/10.2 session.

2 Navigate to InforTools.tbx, and expand the plus icon that appears in the file. The BufferTool popup is displayed.

Note: Locate the InforTools.tbx file on your ArcGIS server in the Catalog window of Arc Map.

3 Right-click on the BufferTool, and then click **Open**.

4 Click **OK** on the BufferTool popup.

5 Select the Geoprocessing - Results menu item from the main menu of the ArcMap 10.1/10.2.

6 Select the latest execution result from the Results window, right-click the selection, and then select the Share As - Geoprocessing Service menu item and publish the geoprocessing service. See ESRI

ArcGIS documentation for information if errors are encountered while publishing the Geoprocessing service.

Configuring Infor EAM and ESRI's ArcMap

Configure Infor EAM and ESRI to best meet the specific needs of your company.

Configuring ArcMap for equipment creation (ESRI)

Configure ArcMap to allow auto-creation of Infor EAM equipment records from within ESRI's GIS.

To configure ArcMap for equipment creation:

- 1 Select **Tools > Extensions**.
- 2 Select **Infor EAM Create Asset Editor Extension**, and then click **Close**.

Modifying the GIS installation parameters (Infor EAM)

Modify the GIS installation parameters in Infor EAM before using GIS.

Note: To display GIS parameters only, select GIS in Dataspy.

To modify the GIS installation parameters:

- 1 Select **Administration > Security > Install Parameters**.
- 2 Select the following parameters and modify as necessary:

Configuration parameters

Parameter	Description
GISAIMSP	Specify the ArcIMS platform. Acceptable values are SHAPEFILE and SDE .
GISAIMSV	Specify the ArcIMS version. For example, enter 9.2 if this is the installed version of ArcIMS.

Parameter	Description
GISCONTP	<p>Specify the connection type between the Infor EAM web server and the ArcIMS server by entering a value of TCP, HTTP, or HTTPS. If no value is specified, a TCP connection is assumed.</p> <p>Note: Used only for ArcIMS server.</p>
GISGPSRV	<p>GIS geoprocessing service (AGS only).</p> <p>See "Configuring the geoprocessing service for the ArcGIS server" on page 167.</p>
GISHOST	<p>ArcIMS server name (and domain if required).</p>
GISIMGFM	<p>Format of map image returned from ArcGIS Server. Acceptable values are BMP, GIF, JPG (default), PNG, and PNG24.</p> <p>Note: Used only for ArcIMS server.</p>
GISPORT	<p>Port number on which the <code>rcIMS</code> service mentioned in the <code>GISSERV</code> install parameter is accessed.</p> <p>Note: Used only for ArcIMS server.</p>
GISSERV	<p>Name of the default Image Service setup on the ArcIMS server or Map Service URL on ArcGIS Server.</p>
GISSRVTP	<p>Specify the GIS server type. Acceptable values are IMS (default) and AGS.</p>
GISSVAXL	<p>GIS map file for service identified by <code>GISSERV</code>. Used for viewing nearest address, e.g., reverse geocoding.</p> <p>Note: <code>GISSVAXL</code> supports HTTP, fully qualified file paths, and UNC file paths. The system requires this to load the XML of the AXL and retrieve the geocoding definitions. Such information is not available via ArcXML responses.</p> <p>You do not need to specify a value for <code>GISSVAXL</code> if you are using ArcGIS.</p>
URLGIS	<p>Enter <code>http://your.infor.com.server/attachments/giswo/tenantid/</code>. Use <code>http://your.infor.com.server /attachments/giswo/default/</code> if no tenant id exists. This value is used when displaying and printing map attachments of the work order.</p>

Search-related parameters

Parameter	Description
GISABLC	Maximum number of advanced buffer layers allowed in an advanced search. The default is 3.
GISADDR	Name of the Address Layer in the Image Service setup in the GISSERV install parameter. Note: When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISCCCOL	Name of the Zone Column in the attributes of the Zone Layer. This parameter is used for non-geocoded, zone-only searches. Note: When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISCITY	Name of the Zone Layer in the Image Service setup as the GISSERV install parameter. This parameter is used for non-geocoded, zone-only searches. Note: When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISSTCOL	Name of the Zone Column in Attributes of the Address Layer. This parameter is used for non-geocoded address searches. Note: When geocoding is used, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV or GISSERV, depending on whether ArcGIS Server or ArcIMS is used.
GISEQUIP	Default equipment layer name
GISGEOSV	ArcIMS: Name of the secondary address for geocoding layers. (See GISSERV for the default Image Service setup). Values should be separated by commas and can identify layers of different services (eg. Layer2, Layer3, Service2.Layer1). ArcGIS Server: Name of the geocoding service(s). Values should be separated by commas.

Parameter	Description
GISGMAXC	Specify the maximum number of geocoding match candidates. The default is 100.
GISGMIN	Specify the minimum geocoding score that the system should display in the Matching Addresses popup. The default is 20. Separate multiple geocoding score values with a comma. The first value listed is the score for GISSERV and subsequent entries are values for each GISGEOSV.
GISINTRS	Specify the separator for searching for intersection addresses. The defaults are &, , and @. Values should be separated with a space. Note: When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISMAPS	Set to Global to display a single map in Infor EAM based on GIS installation parameters. Set to Organization to display maps based on Organization. Set to Department to display maps based on Department. Department Security must be enabled when set to Department.
GISNARAD	Specify the radius, in meters, used for viewing the nearest address. The default value is 1500.
GISSTCOL	Name of the Street Column in Attributes of the Address Layer Note: When geocoding is used the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV or GISSERV, depending on whether ArcGIS Server or ArcIMS is used.
GISZOFCT	Factor (%) of default extent by which the map search result will be enlarged. The default is 2.

Highlighted line parameters

Parameters	Description
GISLNCOL	Specify the color of the highlighted lines in the GIS map by entering an RGB color of 0 to 255.
GISLNWID	Specify the width of highlighted lines in the GIS map, or enter LAYERDEFINED . Note: For more information about the LAYERDEFINED value, see "Customizing map symbols" on page 175.

Parameters	Description
	If ArcGIS Service is being used and the value for this parameter is LAYERDEFINED the color information will come from the map's MXD symbology definition versus the GISLNCOL.

Highlighted point parameters

Parameters	Description
GISPTCOL	Specify the color of the highlighted points in the GIS map by entering an RGB color of 0 to 255.
GISPTTYP	Specify the point type. Valid values for ArcIMS: STAR, CIRCLE, CROSS, SQUARE, TRIANGLE, RASTERMARKER, or LAYERDEFINED. Valid values for ArcGIS Server: CIRCLE, CROSS, SQUARE, DIAMOND, X, RASTERMARKER, or LAYERDEFINED. Default is CIRCLE. Note: If ArcGIS Service is being used and the value for this parameter is LAYERDEFINED the color information will come from the map's MXD symbology definition versus the GISPTCOL.
GISPTWID	Specify the width of the highlighted point used in the GIS map.

Highlighted polygon parameters

Parameters	Description
GISPLYCL	Specify the fill color used for highlighted polygons in the GIS map by entering an RGB color of 0 to 255.
GISPLYBC	Specify the color used for the boundary of highlighted polygons in the GIS map by entering an RGB color of 0 to 255.
GISPLYFT	Specify the fill type of highlighted polygons in the GIS map by entering a value of HORIZONTAL, BDIAGONAL, CROSS, DIAGCROSS, FDIAGONAL or VERTICAL.
GISPLYTR	Specify the transparency level of the color fill of highlighted polygons in the GIS map. Note: If you are using ArcGIS Server, you do not need to specify a value for GISPLYTR because the system does not support the ability to highlight a polygon using a transparent image.

Markup line and point parameters

Parameters	Description
GISMLCOL	Specify the color of the GIS markup line. The defaults are 255, 55, and 155.
GISMLWID	Specify the width of the markup line. The default is 4.
GISMPCOL	Specify the color of the markup point. The default is 255, 55, and 155.
GISMPTYP	Specify the type of the markup point. Valid values for ArcIMS: CIRCLE, STAR, CROSS, SQUARE, TRIANGLE, or RASTERMARKER. Valid values for ArcGIS Server: CIRCLE, CROSS, SQUARE, DIAMOND, X, or RASTERMARKER. Default is CROSS.
GISMPWID	Specify the width of the markup point. The default is 15.

Selected feature parameters

Parameters	Description
GISSFCLR	Specify the highlight color of selected features. The defaults are 248, 138, and 29.

Linear equipment label parameters

Parameters	Description
GISDREL	<p>Specify how the system should display boundary labels for linear equipment (referred to as 'routes' in GIS). Acceptable values are L, N, and A. The default is L.</p> <p>L to display boundary labels for the longest path (in the event of multiple route paths).</p> <p>N to display no boundary labels.</p> <p>A to display boundary labels for all paths (in the event of multiple route paths).</p>

Text marker label parameters

Parameters	Description
GISTFNTC	Specify the font color of the text marker label.
GISTFNFS	Specify the font style of the text marker label by entering BOLD, BOLDITALIC, ITALIC, REGULAR, OUTLINE, or UNDERLINE. The default is BOLD.
GISTFNZ	Specify the font size of the text marker label. The default is 10.
GISFONT	Specify the font of the text marker label. The default is Arial.
GISTGCLR	Specify the color with which to highlight the text marker label.
GISTOCLR	Specify the color with which to outline the text marker label.
GISTPRMD	Specify the print mode for the text marker label by entering ALLUPPER, ALLLOWER, NONE, or TITLECAPS. The default is ALLUPPER.
GISTLPCL	Specify the point color of the text label.
GISTLPTP	Specify the point type of the text label by entering CIRCLE, STAR, CROSS, SQUARE, TRIANGLE or RASTERMARKER. Note: For more information about the RASTERMARKER value, see "Customizing map symbols" on page 175.
GISTLPWD	Specify the width of the point used in the text label.

Overview map parameters

Parameters	Description
GISOVSV	Specify the image service to display within the overview map. The default is the value from GISSERV.
GISOVSZ	Specify the size of the overview map. The number you enter represents a percentage of the width of the current map. The default is 25 .

Customizing map symbols

Infor EAM provides basic symbols for use as map markers; however, you can customize your map symbols with the `RASTERMARKER` or `LAYERDEFINED` installation parameter values.

Define unique symbols with the `RASTERMARKER` value. The `RASTERMARKER` value allows you to place user-defined images on the ArcIMS server, and the system identifies features based on your user-defined image.

The `LAYERDEFINED` value allows you to display symbols based on those defined in ArcIMS from the layer's renderer symbology. The system maintains the displayed images even when you highlight features on the map, e.g., if you highlight manholes and transformers on your map, the system displays the renderer's distinct images for manholes and transformers, but highlights the images according to the color specified in the image's corresponding color installation parameter.

`GISLNNWID` is `LAYERDEFINED`. Then use MxD symbology for color versus `GISLNCOL`.

`GISPTTVP`->`GISPLOL`.

Note: Images must be set up as follows: IMS images must see the GIS server and AGS images must see the Infor EAM server.

Granting interface permissions for data filter grids (Infor EAM)

Users can filter Infor EAM data within ESRI using the Data Filter popup. Grant interface permissions to each of the filterable grids.

To grant interface permissions for data filter grids:

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to grant interface permissions, and then click the **Interface Permissions** tab. See the following table of functions in order to grant user group access to the grids accessible by the GIS data filter:
- 3 Change this information:

Function	Grants Access To
BEGEQ	Equipment grid
BEGEQC	Equipment and related cost details grid
BEGEQE	Equipment and related event details grid
BEGWAC	Work order and related activity details grid
BEGWEQ	Work order and related equipment details grid

- 4 Select a function listed in the table above.
- 5 Specify this information:

Query

Select to allow users to retrieve records.

- 6 Click **Submit**.

Defining Infor EAM user information (ESRI)

Define Infor EAM user information in GIS so that you can create Infor EAM equipment records from within GIS.

Infor EAM user information must be defined for each GIS client machine. After defining user information in GIS's ArcMap, you can define preferences for the creation of Infor EAM equipment records and create them within ArcMap.

To define Infor EAM user information in GIS:

- 1 Open ArcMap to an existing map.
- 2 Click **ArcEditor**.
- 3 Specify this information:

User

Enter a valid Infor EAM user name.

Note: If you are working in a multi-tenant environment, enter `username@tenantID`, e.g., if your username is SMITHB and your tenant ID is dsmp1, enter `SMITHB@dsmp1`.

Password

Enter the user's Infor EAM password.

Confirm Password

Re-enter the user's Infor EAM password.

Organization

Enter the organization under which the user logs in to Infor EAM.

Style

Select the style sheet to apply to Infor EAM popups in ArcMap. The system applies the selected style sheet to the popup immediately.

Note: The system provides three stylesheets: Default, Blue, and Gray. To create a custom style sheet, open `DEFAULT.XSS` located in `C:\inforEAM\GIS\TOOLBAR\STYLES` and make changes to the file as necessary. Do not save your changes to the original `DEFAULT.XSS` file; instead, save the style sheet under a new name to the same location. The newly created style sheet appears as an option in the dropdown list for **Style**.

Infor EAM URL

Enter the URL address for the Infor EAM server to which ArcMap should connect, e.g., `http://<yourserver.yourcompany>/axis/...services/EWSCconnector`.

Tenant

Enter the tenant ID if you are working in a multi-tenant environment.

- 4 Click **Submit**. ArcMap saves the record on the user's machine in C:\inforEAM\GIS\CONFIEWSUSER.XML.

Note: The system automatically creates this file if it does not already exist.

Defining field mappings for attributes (Esri)

Define field mappings for attributes stored within Esri's GIS and Infor EAM at the layer level. The fields are populated based on the mappings during equipment/feature creation and synchronization.

Note: To define field mappings, you must have OEGGMP permissions.

During equipment/feature creation, the fields are populated based on the mapping relationship, e.g., to create an equipment record based on an existing feature, map data from a GIS Attribute to an Infor EAM Attribute. Infor EAM populates the field with the data contained in ESRI's GIS. You can also define field mappings based on constant values, e.g., enter a GIS Value of HYDRANT and map it to the category field in Infor EAM. During equipment creation, the system always populates the category field with HYDRANT.

During synchronization, the system accesses field mappings to ensure corresponding equipment records and features reflect accurate data. If there is a discrepancy in data, the system copies data from one system to the other.

Note: You do not have to define field mappings for a feature's layer, location X, or location Y. These values are automatically populated in the EAM equivalent fields during creation and synchronization. You may, however, define additional field mappings for these GIS attributes if you want the values of these fields copied into other EAM fields.

You may map more than one GIS Attribute to a single Infor EAM Attribute and vice-versa. During creation and synchronization, the system concatenates the data into the single field based on the **Sequence** and **Delimiter**.

Likewise, you can map an Infor EAM Attribute that contains concatenated data into more than one GIS Attribute and vice-versa. During creation and synchronization, the data is parsed based on the **Sequence**. If the system must parse data because one field is mapped to multiple fields, it verifies that the number of fields to which to map data matches the instances of concatenated data in the source field. If it does not, the data is not synchronized. If, however, the source field in the owner system contains a null value, the null value is copied to the multiple fields in the other system, overwriting any data that those fields originally contained.

Identify a **Source** system, which controls creation, and an **Owner** system, which controls synchronization. The data is mapped from the **Source** system during equipment/feature creation. The data is copied from the **Owner** system during synchronization. See the following example.

You define the following field mapping for the Hydrant layer:

GIS Attribute	Infor EAM Attribute	Source	Owner
ADDRESS	Description	GIS	Infor EAM

During synchronization of the Hydrant layer, the system discovers that a feature with the ADDRESS attribute of 156 Main Street does not have a corresponding Infor EAM equipment record. The system creates an equipment record and automatically populates its description field with 156 Main Street because Esri's GIS is the **Source**.

Later, you update the same equipment record's description to 256 Main Street in EAM. During the next synchronization of the Hydrant layer, the system updates the GIS feature's ADDRESS attribute to 256 Main Street because Infor EAM is the **Owner** of this attribute.

Note: The system only compares attribute data for EAM and GIS if the attribute has a defined field mapping and the **Action** is set to Copy.

To define field mappings for attributes:

- 1 Open ArcMap to an existing map.

Note: The map must contain an integrated layer to access the [Map Feature Attributes](#) popup.

- 2 Click **Display Map**.
- 3 Select the layer for which to define field mappings.
- 4 Click **Add Mapping**.
- 5 Specify this information:

Type

Specify the mapping type for the record as **Equipment** or **Work Orders**.

Infor EAM Grid

If you selected **Work Orders** as the value for **Type**, specify the EAM user defined grid to use for mapping. The fields available for mapping are based upon the EAM grid selected here.

Note: The user defined grid must be **Active** and have the **GIS WO Attribute Mapping Grid** check box selected to show in this lookup.

Type and **Infor EAM Grid** fields only display when an event layer is selected to define field mappings.

Source

Select the system from which data should be mapped during equipment/feature creation. Choose one of the following options:

- **GIS**
Select to map data from GIS when creating new equipment records based on an existing GIS feature.
- **Infor EAM**
Select to map data from Infor EAM when creating new features based on an existing Infor EAM equipment record.
- **Both**
Select to apply this mapping when creating new equipment records/features regardless of which system the object originally resides. The system maps data from Infor EAM when creating new features and maps from ESRI's GIS when creating new equipment records.

- 6** Select the attribute (GIS Attribute or Infor EAM Attribute) from which data should be mapped or enter the value (GIS Value of Infor EAM Value) that should be mapped. The attribute or value should coincide with the source system, e.g., if you selected GIS as the **Source** system, select a GIS Attribute of GIS Value to map.

Note: If you select Layer, Location X, Location Y, or Feature Length as the **GIS Attribute** from which to map data, the system automatically populates **Source** as GIS, **Action** as Copy, and **Owner** as GIS.

- 7** Select the attribute (GIS Attribute or Infor EAM Attribute) to which data should be mapped. See the following table to understand the relationship between Mapped From and Mapped To, e.g., if you select a GIS Attribute in Step 6, you must enter an Infor EAM Attribute in Step 7:

Mapped From	Mapped To
GIS Attribute	Infor EAM Attribute
GIS Value	Infor EAM Attribute
Infor EAM Attribute	GIS Attribute
Infor EAM Value	GIS Attribute

Note: For linear features, map the GIS Attribute feature length to the Infor EAM Attribute equipment length, and then map the GIS Attribute for the feature’s unit of measure to the Infor EAM Attribute equipment length unit of measure to enable linear equipment capabilities in Infor EAM. You must create your own GIS attribute in ESRI for the feature’s unit of measure.

- 8** Specify this information:

Action

Choose one of the following options:

- **Copy**
Select to copy the attribute data from the Source system.
- **Move**
Select to move the attribute data from the Source system. After the move is completed, the data will only exist in one system.

Note: If you select **Move**, the system protects **Owner**. Defining an **Owner** implies the data exists in both systems.

Owner

Select the system that controls synchronization when a discrepancy exists between a corresponding feature and equipment record. Data is copied from the **Owner** system to the field of the other system.

Sequence

Select the sequence number of the mapping. If you select any number other than 1, the system enables **Delimiter**.

Note: You must select a **Sequence** number greater than 1 in the event that you map more than one GIS attribute to a single attribute within Infor EAM, e.g., if you map HYDRANT and HYDRANT_ID from GIS to **Asset** EAM within , the system must know which data to list first in the EAM Asset field.

Delimiter

Specify the delimiter value to use in the event that you map more than one GIS attribute to a single EAM Attribute.

- 9 Click **Submit**.

Defining preferences for the creation of Infor EAM equipment (ESRI)

Define preferences for Infor EAM equipment records that you create from within the GIS system. When you define preferences, specify the equipment profile that GIS should use to create the Infor EAM equipment record when you create features in the related GIS layer.

Note: When creating equipment records, the system populates fields based on field mapping. If there is no mapping available for a field, the system populates the field based on the GIS profile.

Based on the information you enter in the Infor EAM Preferences popup, GIS can automatically create an Infor EAM equipment record in the same layer as its corresponding GIS feature whenever you define a new GIS feature. The system will not create an Infor EAM equipment record if the layer of the GIS feature is not listed in the preferences file.

Note: If you want to save an existing preference file in a different location, relocate the file, and then enter the new file path in Path To Preferences.

To define preferences for the creation of Infor EAM equipment:

- 1 Open ArcMap to an existing map.
- 2 Click **ArcEditor**.
- 3 Click the **Preferences** tab.
- 4 Specify this information:

Path To Preferences

Enter the file path in which to store the Infor EAM preferences.

Note: ArcMap saves all files as .XML files.

- 5 Click **Add Preference**.
- 6 Specify this information:

Profile

Enter the Infor EAM equipment profile that ArcMap should use to create Infor EAM equipment records. The system automatically populates **Profile Org**.

Layer

Select the GIS layer in which Infor EAM equipment records should appear.

Auto-create

Select if you want GIS to automatically create corresponding Infor EAM equipment records for features that you create within GIS.

Default

Select if this preference record is the default preference record.

Note: Each profile can have only one default preference record per layer. You cannot select more than one record containing the same layer as a default record.

7 Click **Submit**.

Defining preferences for the creation of GIS features (Infor EAM)

Define preferences for GIS features that you create from within Infor EAM. When you define preferences, specify the equipment profile related to the layer in which you intend to create the new GIS feature. The system retrieves the default **Layer**, **Location X**, and **Location Y** based on the preference.

Note: When creating features, the system populates attribute data based on field mapping. If there is no mapping available for an attribute, the system populates the attribute data based on the GIS profile.

Also specify how Infor EAM retrieves data for the creation of GIS features. There are three ways to populate data for the creation of GIS features from within Infor EAM: Auto-create, Prompt, and Manual.

Auto-create

If you specify the preference for the creation of GIS features as Auto-Create, when users select a GIS profile when defining new Infor EAM equipment, the system automatically generates a **GIS ID** and populates the default **Layer**, **Location X**, and **Location Y** based on the preference.

This chapter provides procedures for configuring the fleet management module.

For more information on the American Trucking Association's Vehicle Maintenance Reporting System (VMRS) and defining VMRS in the system, see the *Infor EAM User Guide*.

For more information on fleet management reports, see the *Infor EAM User Guide*.

To access Infor EAM Databridge functions within Infor EAM, you must first set up Databridge menus for user groups.

See "Setting Up Menus for User Groups" on page 88.

Understanding fleet configuration

Use the Fleet Configuration page to personalize the vehicle ticketing, maintenance, and billing process for pool, loaner, and/or assignment fleets of vehicles. First, create billing parameters to configure the point at which vehicle tickets are billed. Next, set up billing schedules to determine the billing end dates for the period billing process, and create exceptions to include in bills when needed. Next, grant authorizations to specific user groups for specific vehicle types. Finally, identify fuel, maintenance, and billing categories.

You must also define cost codes, employees, and assets for use in the fleet management module. The cost codes, employees, and assets are not a part of the fleet management module.

Creating parameters for fleet configuration

Set up parameters to determine the **Vehicle Ticket** form behavior and how the vehicle usage will be billed.

To create parameters for fleet configuration:

- 1 Select **Work > Fleet > Fleet Configuration**.
- 2 Specify this information:

Update Ticket PM Details

Choose one of the following options:

- **At Issue**
Select to update the PM details on the vehicle ticket when a vehicle is issued.
- **At Return**
Select to update the PM details on the vehicle ticket when a vehicle is returned.
- **Issue and Return**
Select to update the PM details on the vehicle ticket when a vehicle is issued and returned.

Note: Previous and next PM details are updated on the ticket of the specified time(s).

Min. Hours Billed

Enter the minimum number of hours to be billed. For example, if the **Min. Hours Billed** is four hours and the vehicle is returned after two hours, the customer will be billed for the minimum amount of four hours.

Offshift Billing Hours

Enter the number of hours if the usage includes any time outside of the billing start and end time. For example, if the normal billing hours are from 8:00 AM to 5:00 PM, any hours before 8:00 AM and after 5:00 PM will be considered offshift billing hours. Vehicles issued or returned outside the billing hours are billed accordingly. The offshift billing hours are billed once every 24-hour period.

Prompt When No Billing Code

Select to provide a warning message from the vehicle ticket if the system cannot find a billing code or markup code on the vehicle ticket at the time the vehicle is issued.

Billing Start Time

Select the time, in hours, at which the normal billing hours for the day should start, and then enter the time, in minutes, at which the normal billing hours should start in the adjacent field.

Billing End Time

Select the time, in hours, at which the normal billing hours for the day should end, and then enter the time, in minutes, at which the normal billing hours should end in the adjacent field.

Note: If both **Billing Start Time** and **Billing End Time** are empty, the system selects a 24-hour billing cycle. **Billing Start Time** must be before **Billing End Time**.

Round Billing Hrs. Up

Select to round the billing hours to the nearest $\frac{1}{4}$, $\frac{1}{2}$, or whole hour.

Note: If you do not want to round the ticket billing hours up, do not enter a value for **Round Billing Hrs. Up**.

Pool

Select to indicate that the fleet customer and cost code on the vehicle record needs to be updated with the ticket values when a pool ticket is created.

Loaner

Select to indicate that the fleet customer and cost code on the vehicle record needs to be updated with the ticket values when a loaner ticket is created.

Assignment

Select to indicate that the fleet customer and cost code on the vehicle record needs to be updated with the ticket values when an assignment ticket is created.

3 Click Save Record.

Note: If the process fails to run automatically as scheduled, click **Run Billing Process** to manually run the billing process. The system generates customer bills, beginning with the earliest **Period End Date** specified on the **Billing Schedules** page of the **Fleet Configuration** form that is past due.

See "Setting up billing schedules for fleet configuration" on page 185.

You cannot manually run the billing process unless the **Process Start Date/Time** on the **Billing Schedules** page is before the current system date and time; the period has not been billed; Billed on the **Billing Schedules** page is unselected; and the billing process for the record is not currently running or the billing process for the record is running but has been running for longer than 30 minutes.

Setting up billing schedules for fleet configuration

Set up billing schedules to determine what transactions are billed and when they will be created. At the end of the billing schedule, generate customer bills that correspond with the billing schedule Period End Date.

See "Creating parameters for fleet configuration" on page 183 for more information on running the billing process.

To set up billing schedules for fleet configuration:

- 1 Select **Work > Fleet > Fleet Configuration**.
- 2 Click the **Billing Schedules** tab.
- 3 Click **Add Billing Schedule**.
- 4 Specify this information:

Period End Date

Enter the date at which the billing period will end, e.g., 6/25/05.

Period Description

Enter a description of the billing period, e.g., June 2005.

Process Start Date

Enter the date at which to start the billing process for the selected billing period.

Note: The **Process Date/Start Time** must be greater than the **Period End Date**.

Process Start Time

Enter the time in hours and minutes at which to start the billing process.

5 Click **Submit**.

Note: If the billing process is currently running for the period, the system selects **In Process**. The system selects **Billed** after the billing process has been run for the billing schedule.

See "Creating parameters for fleet configuration" on page 183.

You can manually select **Billed** to create a starting point for the first billing process.

Creating exceptions for fleet configuration

Create exception codes, and then associate fees with the exception codes that will be included in bills. For example, create an exception code that charges customers for low amounts of fuel in returned vehicles, and then associate a \$50 fee for that specific exception. Exception codes are associated with vehicle tickets on the **Exceptions** page of the **Vehicle Ticket** form.

To create exceptions for fleet configuration:

- 1** Select **Work > Fleet > Fleet Configuration**.
- 2** Click the **Exception Codes** tab.
- 3** Click **Add Exception**.
- 4** Specify this information:

Exception

Enter the exception to be applied to vehicle tickets, and then enter a description of the exception in the adjacent field.

Organization

Enter the organization to which the exception belongs if you use multi-organization security.

Billing Amount

Enter the set fee to associate with the exception during the billing process.

Standard WO

Enter a standard work order that can be used to create work that corrects the exception condition for the vehicle ticket.

Out of Service

Select to prevent the exception from being displayed in the lookups.

5 Click **Submit**.

Granting vehicle ticket authorizations for fleet configuration

Grant vehicle ticket authorizations to define appropriate privileges to user groups for pool, loaner, and assignment vehicle ticket types. Associate specific user groups with specific vehicle ticket types, and then grant authorizations for the user group to insert, delete, and/or update vehicle ticket records of that type.

Note: You can only grant vehicle ticket authorizations if the installation parameter VTTAUTH is set to ON. Contact your system administrator for more information.

To grant vehicle ticket authorizations for fleet configuration:

- 1 Select **Work > Fleet > Fleet Configuration**.
- 2 Click the **Vehicle Ticket Authorizations** tab.
- 3 Click **Add Authorization**.
- 4 Specify this information:

Ticket Type

Select the vehicle ticket type with which to associate a user group.

User Group

Enter the user group to which to grant vehicle ticket authorizations.

Insert

Select to give the user group authorization to insert new vehicle ticket records.

Update

Select to give the user group authorization to update existing vehicle ticket records.

Delete

Select to give the user group authorization to delete existing vehicle ticket records.

- 5 Click **Submit**.

Tracking fuel costs for fleet configuration

Track fuel costs and separate fuels costs from other costs by associating part classes that identify fuel parts in inventory. The system bills any parts of the selected class that are issued to vehicles as fuel. Costs related to this billing category are displayed on the bill.

To track fuel costs for fleet configuration:

- 1 Select **Work > Fleet > Fleet Configuration**.
- 2 Click the **Fuel** tab.
- 3 Click **Add Part Class**.
- 4 Specify this information:

Part Class

Enter the part class that identifies fuel parts in inventory. The system automatically populates the part class description in the adjacent field. The system automatically populates **Part Class Org.**

- 5 Click **Submit**.

Tracking maintenance costs for fleet configuration

Track maintenance costs for fleet configuration by entering work order types that identify maintenance or non-maintenance related costs for the billing process. Costs related to both maintenance and non-maintenance billing categories are displayed on the bill.

To track maintenance costs for fleet configuration:

- 1 Select **Work > Fleet > Fleet Configuration**.
- 2 Click the **Maintenance** tab.
- 3 Click **Add WO Type**.
- 4 Specify this information:

WO Type

Select the work order type for which to track maintenance costs.

Maintenance

Select to indicate that the costs are maintenance costs.

Note: If you select **Maintenance**, the costs associated with work orders of this type will display on the **Billing History** page of the **Fleet Customers** form under **Maintenance**. If you unselect **Maintenance**, the costs associated with work orders of the specified work order type will display as non-maintenance costs.

See "Viewing Billing Histories for Fleet Customers" on page 196

- 5 Click **Submit**.

Creating fleet billing codes

Create billing codes to determine the normal fees that customers are billed for vehicle usage through the ticketing process. Together, billing codes and markup codes, when associated with specific fleet customers, determine the total rates for specific fleet billing categories.

To create fleet billing codes:

- 1 Select **Work > Fleet > Fleet Billing Codes**.
- 2 Click **New Record**.
- 3 Specify this information:

Organization

Enter the organization to which the fleet billing code belongs if you use multi-organization security.

Code

Enter a fleet billing code, and then enter a description of the fleet billing code in the adjacent field.

Class

Enter the class to which the fleet billing code belongs. The system automatically populates **Class Org.**

Out of Service

Select to prevent the fleet billing code from being displayed in the lookups.

- 4 Click **Save Record**.

Setting up rates for fleet billing codes

Set up rates for fleet billing codes. Specify particular rates for particular dates by setting up start dates and end dates for the rates. For example, a usage rate might fluctuate during different times of the year. Set up usage rates for usage charges, mileage rates for mileage charges, and insurance rates for insurance charges.

To set up rates for fleet billing codes:

- 1 Select **Work > Fleet > Fleet Billing Codes**.
- 2 Select the fleet billing code for which to set up rates, and then click the **Rates** tab.
- 3 Click **Add Rate**. The system automatically populates all currency fields.
- 4 Specify this information:

Start Date

Enter the start date of the rate.

End Date

Enter the end date of the rate.

Note: **Start Date** must be on or before the **End Date**.

Usage Rate Type

Choose one of the following options:

- **Hourly**
Select to bill usage charges by the hour.
- **Billing Period**
Select to bill usage charges according to the billing period.
- **Usage Charge**
Enter the usage charge for the rate, if the rate is a usage rate.

Note: To set up a usage rate, you must enter both a **Usage Rate Type** and a **Usage Charge**.

Mileage Charge

Enter the mileage charge for the rate, if the rate is a mileage rate.

Insurance Charge

Enter the insurance charge for the rate, if the rate is an insurance rate.

- 5 Click **Submit**.

Creating fleet markup codes

Create fleet markup codes. Markup codes are used to charges additional fees above and beyond the normal fees, i.e., profit margin. Together, billing codes and markup codes, when associated with specific fleet customers, determine the total rates for fleet billing categories.

To create fleet markup codes:

- 1 Select **Work > Fleet > Fleet Markup Codes**.
- 2 Click **New Record**.
- 3 Specify this information:

Organization

Enter the organization to which the fleet markup code belongs if you use multi-organization security.

Code

Enter a fleet markup code, and then enter a description of the fleet markup code in the adjacent field.

Class

Enter the class to which the fleet markup code belongs. The system automatically populates **Class Org**.

Out of Service

Select to prevent the fleet markup code from being displayed in the lookups.

- 4 Click **Save Record**.

Setting up rates for fleet markup codes

Set up rates for fleet markup codes. Specify particular rates for particular dates by setting up start dates and end dates for the rates. A markup can be expressed as a flat rate or a flat percentage. For example, select to mark up the cost of fuel by 20 USD (per inventory UOM) or by 50 percent.

Note: You cannot enter a markup charge and a markup percentage for the same markup code.

To set up rates for fleet markup codes:

- 1 Select **Work > Fleet > Fleet Markup Codes**.
- 2 Select the fleet markup code for which to set up rates, and then click the **Rates** tab.
- 3 Click **Add Rate**.
- 4 Specify this information:

Start Date

Enter the start date of the rate.

End Date

Enter the end date of the rate.

Note: **Start Date** must be on or before **End Date**.

Fuel

Enter the markup amount for fuel charges.

Labor

Enter the markup amount for labor charges.

Parts

Enter the markup amount for parts charges.

Contract Labor

Enter the markup amount for contract labor charges.

Pool Mileage

Enter the markup amount for mileage charges on pool tickets.

Loaner Mileage

Enter the markup amount for mileage charges on loaner tickets.

Assignment Mileage

Enter the markup amount for mileage charges on assignment tickets.

Pool Usage

Enter the markup amount for usage charges on pool tickets.

Loaner Usage

Enter the markup amount for usage charges on loaner tickets.

Assignment Usage

Enter the markup amount for usage charges on assignment tickets.

Insurance

Enter the markup amount for insurance charges.

Fuel %

Enter the markup percentage for fuel charges.

Labor %

Enter the markup percentage for labor charges.

Parts %

Enter the markup percentage for parts charges.

Contract Labor %

Enter the markup percentage for contract labor charges.

Pool Mileage %

Enter the markup percentage for mileage charges on pool tickets.

Loaner Mileage %

Enter the markup percentage for mileage charges on loaner tickets.

Assignment Mileage %

Enter the markup percentage for mileage charges on assignment tickets.

Pool Usage %

Enter the markup percentage for usage charges on pool tickets.

Loaner Usage %

Enter the markup percentage for usage charges on loaner tickets.

Assignment Usage %

Enter the markup percentage for usage charges on assignment tickets.

Insurance %

Enter the markup percentage for charges on insurance tickets.

5 Click **Submit**.

Setting up fleet customers

Set up fleet customers to use throughout the Fleet Management system. Set up billing details to determine the costs for which the customer is billed.

To set up fleet customers:

- 1 Select **Work > Fleet > Fleet Customers**.
- 2 Click **New Record**.
- 3 Specify this information:

Organization

Enter the organization to which the fleet customer belongs if you use multi-organization security.

Fleet Customer

Enter the name of the fleet customer, and then enter a description of the fleet customer in the adjacent field.

Class

Enter the class to which the fleet customer belongs. The system automatically populates **Class Org.**

Billable

Select if the customer will be billed.

Note: You must select **Billable** to generate bills for the customer.

Out of Service

Select to prevent the fleet customer from being displayed in the lookups.

Bill for No Charges

Select to print a bill by default when the bill is for \$0.

Maintenance Labor

Select to bill for maintenance labor.

Maintenance Contract Labor

Select to bill for maintenance contract labor.

Maintenance Parts

Select to bill for maintenance parts.

Fuel

Select to bill for fuel.

Mileage

Select to bill for mileage.

Usage

Select to bill for usage.

Non-maintenance Labor

Select to bill for non-maintenance labor.

Non-maintenance Contract Labor

Select to bill for non-maintenance contract labor.

Non-maintenance Parts

Select to bill for non-maintenance parts.

Insurance

Select to bill for insurance.

Exceptions

Select to bill for exceptions.

- 4 Click **Save Record**.

Associating cost codes with fleet customers

Associate cost codes with fleet customers to correctly display transaction costs on fleet bills.

To associate cost codes with fleet customers:

- 1 Select **Work > Fleet > Fleet Customers**.
- 2 Select the fleet customer with which to associate cost codes, and then click the **Cost Codes** tab.
- 3 Click **Add Cost Code**.
- 4 Specify this information:

Cost Code

Enter the cost code with which to associate the fleet customer. The system automatically populates the cost code description.

- 5 Click **Submit**.

Note: You can only associate a cost code with one fleet customer.

Associating billing codes with fleet customers

Associate billing codes with fleet customers. By associating a specific billing code with a specific fleet customer, you determine the rate for a specific billing category. Together billing codes and markup codes, when associated with specific fleet customers, determine the total rates for fleet billing categories such as usage and mileage.

To associate billing codes with fleet customers:

- 1 Select **Work > Fleet > Fleet Customers**.
- 2 Select the fleet customer with which to associate billing codes, and then click the **Billing Codes** tab.
- 3 Click **Add Code**.
- 4 Specify this information:

Billing Code

Enter the billing code with which to associate the fleet customer. The system automatically populates the billing code description.

Markup Code

Enter the markup code with which to associate the fleet customer. The system automatically populates the markup code description.

Note: You must enter a **Billing Code** and/or a **Markup Code**.

Equipment Type

Select the equipment type with which to associate the fleet customer.

Equipment Class

Enter the equipment class with which to associate the fleet customer. The system automatically populates the equipment class description and **Equip. Class Org.**

Equipment Category

Enter the equipment category with which to associate the fleet customer. The system automatically populates the equipment category description.

Maintenance Labor

Select to bill for maintenance labor.

Maintenance Contract Labor

Select to bill for maintenance contract labor.

Maintenance Parts

Select to bill for maintenance parts.

Fuel

Select to bill for fuel.

Mileage

Select to bill for mileage.

Usage

Select to bill for usage.

Non-maintenance Labor

Select to bill for non-maintenance labor.

Non-maintenance Contract Labor

Select to bill for non-maintenance contract labor.

Non-maintenance Parts

Select to bill for non-maintenance parts.

Insurance

Select to bill for insurance.

Exceptions

Select to bill for exceptions.

5 Click **Submit**.

Viewing billing histories for fleet customers

Views all previously generated bills, or view a specific billing cycle by entering a **Period End Date**. Fleet bill charges are summarized to the unique fleet customer cost code and vehicle level. Charges are displayed by the following categories: Usage, Mileage, Maintenance, Non-maintenance, Fuel, Insurance, and Exceptions. The system also displays a total charge for each bill line, a subtotal, which summarizes the charges for all bill lines by category, an adjustment line, which summarizes all adjustments entered for previous bills that are included in the selected bill, grand totals of each of the charge categories, and a total bill charge. You can also select to print bills and view current charges.

Note: When filtering the billing histories, **Subtotals** and **Totals** may change because they are relative to the specific fleet bill lines in the grid. **Adjustments** totals will not change, as they are related to the entire bill.

To view billing histories for fleet customers:

- 1 Select **Work > Fleet > Fleet Customers**.
- 2 Select the fleet customer for which to view billing history, and then click the **Billing History** tab.
- 3 Specify this information:

Period End Date

Enter the period end date for which to view a bill for a specific fleet customer. The system automatically populates **Bill No.** Click **Current Charges** to view billing details from the current billing period's start date through the system date (today). If a past period needs to be billed, the system cannot display current period data. Click **Print Bill** to print the bill. You must enter a **Period End Date** to print the bill. You cannot print current charges.

- 4 View the billing history.

Viewing fleet bill transactions for fleet customers

View individual transaction information for specific billing categories. For example, select Usage as the Category, and then click View Transactions. The system displays the specific usage transactions that make up the usage subtotal for the selected line. This includes usages charges and usage markup charges.

To view fleet bill transactions for fleet customers:

- 1 Select **Work > Fleet > Fleet Customers**.
- 2 Select the fleet customer for which to view fleet bill transactions, and then click the **Billing History** tab.
- 3 Specify this information:

Period End Date

Specify the period end date for which to view fleet bill transactions for a specific fleet customer, and then select the bill line for which to view bill transactions for fleet customers. **Bill No.** is automatically populated.

Select the fleet bill line for which to view fleet bill transaction for fleet customers.

Note: You must enter a **Period End Date** and select a bill line to view fleet bill transactions. You cannot view fleet bill transactions for current charges.

- 4 Choose one of the following options for **Category**:

Option	Description
Usage	Select to show usage charges only.
Mileage	Select to show mileage charges only.
Maintenance Labor	Select to show maintenance labor charges only.
Maintenance Parts	Select to show maintenance parts charges only.
Non-maintenance Labor	Select to show non-maintenance labor charges only.
Non-maintenance Parts	Select to show non-maintenance parts charges only.
Fuel	Select to show fuel charges only.
Insurance	Select to show insurance charges only.
Exceptions	Select to show exception charges only.

- 5 Click **View Transactions**.
 6 View the charges for the specific transaction category.

Viewing fleet bill adjustment transactions for fleet customers

View individual adjustment transaction information for specific billing categories. For example, select **Usage** as the **Category**, and then click **View Adjustment Transactions**. The system displays the specific usage adjustment charges that make up the entire bill. This includes usages adjustment charges and usage markup charges. The system displays all adjustments related to the bill and category.

To view fleet bill adjustment transactions for fleet customers:

- 1 Select **Work > Fleet > Fleet Customers**.
- 2 Select the fleet customer for which to view fleet bill adjustment transactions, and then click the **Billing History** tab.
- 3 Specify this information:

Period End Date

Specify the period end date for which to view fleet bill adjustment transactions for a specific fleet customer, and then select the bill line for which to view fleet bill adjustment transactions for specific customers.

You must specify a **Period End Date** to view fleet bill adjustment transactions. You cannot view fleet bill adjustment transactions for current charges.

Category

Choose one of the following options:

Option	Description
Usage	Select to show usage charges only.
Mileage	Select to show mileage charges only.
Maintenance Labor	Select to show maintenance labor charges only.
Maintenance Parts	Select to show maintenance parts charges only.
Non-maintenance Labor	Select to show non-maintenance labor charges only.
Fuel	Select to show fuel charges only.
Insurance	Select to show insurance charges only.
Exceptions	Select to show exception charges only.

- 4 Click **View Adjustment Transactions**.
- 5 View the charges for the specific adjustment transaction category.

Replacing fleet cost codes

Replace non-billable cost codes on all fleet transactions that will be billed to a fleet customer on the next bill. Replace cost codes on transactions before bills are generated and sent to the general ledger.

First, search cost codes for non-billable cost codes that are associated with at least one fleet transaction (work order, inventory transaction, vehicle ticket, or ticket adjustment) that will be billed in the next scheduled billing period and are not currently locked for replacement by another user. Next, replace existing code values with new cost code values for the appropriate transactions.

Note: You must have query privileges on the **Fleet Cost Code Search & Replace** form for the cost code organization in order to search and replace cost codes.

To replace fleet cost codes:

- 1 Select **Work > Fleet > Fleet Cost Code Search & Replace**.
- 2 Click **Search**. The system calculates the number of transactions associated with the non-billable cost code for the current period.

Note: The system only displays non-billable cost codes that are associated with at least one fleet transaction that will be billed in the next scheduled billing period and are not currently locked for replacement by another user. You cannot search and replace cost codes for billed transactions. You cannot search and replace cost codes for periods that are past due and un-billed.

- 3 Specify this information:

New Cost Code

Enter a new cost code for every **Current Cost Code** that must be replaced.

Remove

Select to remove the record from the grid.

See "Viewing cost code errors" on page 199.

Note: To remove all of the transactions at once, select **Remove**. To unselect all the line items at once, unselect **Remove**.

4 Click **Replace**.

Note: You must enter **New Cost Codes** before clicking **Replace**.

Viewing cost code errors

View all errors that occurred during the cost code search and replace process.

To view cost code errors:

- 1** Select **Work > Fleet > Fleet Cost Code Search & Replace**.
- 2** Select the record for which to view cost code errors, and then click the **Errors** tab.
- 3** View the cost code error information.

Archive work orders, purchase orders, stock transactions, electronic records, and audit trail records.

Archiving records

Archive work orders, purchase orders, stock transactions, electronic records, and audit trail records.

Note: During the archive process archived items are removed from normal view. The items are added to separate archive tables.

Archived items will no longer be available for reports or budgets.

To archive records:

- 1 Select **Administration > Setup > Archive Records**.
- 2 Click **New Record**.
- 3 Specify this information:

Archive Through

Specify the date through which to archive.

- 4 Optionally, select the **Work** check box to archive work orders where System Status=C and Date Completed <=Archive Through, and then specify the **Work Order Type** to further filter the available work records for archiving.

The following are archived in connection to work order and work order activities:

Archived Items
Qualifications
Schedules
Additional charges
Material Lists with Event
Pick Lists for the WO
Booked hours

Archived Items

Quotations with Services for the WO
Purchase Orders with Direct Materials for WO Activities
Repair Parts
Calculated costs for the WO
Costs
Instruments (Calibration)
Standards (Calibration)
Systems (VMRS)
Test Points (Calibration)
Aspects (Inspection)
Points (Inspection)
Linear References
Account Details
Matched invoices for POs
Requisitions with WO on header
Quotations that reference the Requisition
Receipts for Direct Materials for WO Activities
Dock Receipts for Direct Materials for WO Activities
Issues>Returns for WO Activities
Supplier Evaluations for WO Activities
Warranty Claims for WO Activities
Reservations for WO Activities
Tools requested for WO Activities
Tool Usage for WO Activities
Customer Contracts for the WO
Customer Invoices with lines for the WO
Fixed payments for the customer contract
Dispatches for standing WO Activities

Note: Only those with a **Status** of **Approved** or **Completed** are archived.

- 5** Select the Purchasing check box to archive purchasing transactions.
The following are archived related to archived invoices:

Archived Items

Invoices with Matched or Cancelled status

Lines

Extra charges and discounts

Extra charges for costs tab

Invoice allocations

Account details

The following are archived related to archived purchase orders:

Archived Items

PO Headers-Order clauses, lines, extra charges, revisions

Blanket Orders

Booked Hours

Dock receipts

Packing slips

Invoices

Order Tracking

Supplier Evaluation

The following are archived related to archived requisitions:

Archived Items

Requisitions headers with Approved or Cancelled status

Lines

WOs

WO repair parts referencing the Requisition/Requisition line

Warranty claims referencing the Requisition/Requisition line

Transactions

The following are archived related to archived quotations:

Archived Item

Quotation headers and lines

- 6** Select the **Stock Transactions** check box to archive stock transactions with a **Status** of **Approved** or **Cancelled**.

The following are archived related to stock transactions:

Archived Items

Issues>Returns

Price Correction

Manual Price Type Change

Return for Repair

Stocktake with Approved or Cancelled status

7 Select the **Audit Trail** check box to archive the audit trail, a history of changed records.

8 Select the **Electronic Records** check box to archive electronic records.

The following shared tables are archived related to archived work orders, work order transactions, purchasing transactions, and stock transactions.

Archived Items

Descriptions

Audit Trail Records

Electronic Signatures

Event Addresses

Documents

Comments

Custom Fields

Associated Parts

Permits

Account Details

Note: Select a value from 0 to 23 for the `ARCHTIME` install parameter to schedule a time for the archive process to run between 12:00 AM and 11:00 PM, e.g., for 12:00 AM, select 0 and for 11:00 PM, select 23.

Set the `ARCHTIME` to null to let the archive process run immediately on clicking **Start**.

9 Click **Start** to begin the archive process.

10 The archive record is saved.

Note: Click **Status** to view the number of records archived.

Click **Stop** to halt the archive process. This will stop the process but will not cancel the process. The current archive record will finish before stopping. The transactions already archived will not roll back.

Viewing archive results

To view archive results:

- 1 Select **Administration > Setup > Archive Records**.
- 2 Click the tab corresponding to the archive results you wish to view.
- 3 View the archive results.

Setting up basic module data is a simplified initial setup process. These options can also be defined as installation parameters.

For more detailed information regarding installation parameters and initial setup, see the *Infor EAM System Administrator Guide*.

Defining administration setup

Define administration setup options to format the module to your specifications.

To define administration setup:

- 1 Select **Administration > Administration Setup**.
- 2 Specify this information:

Line Number Increment (INCRINO)

Enter the value by which to increase the line number when automatic line numbering is activated.

Minimum Password Length (PASSMINL)

Enter the minimum number of characters allowed for a system password.

Password Duration Days (SECUPWEP)

Enter the number of days in the password expiration period.

Reuse Password Days (SECUPWRP)

Enter the number of days before a user can reuse an expired password.

Infor EAM CD Key (CDKEY)

Enter the Infor EAM CD Key.

Infor EAM Consumer Reports CD Key (CDKEY)

Enter the Infor EAM Consumer Reports CD key.

Infor EAM Report Author CD Key

Enter the Infor EAM Report Author CD key.

Infor EAM Requestor CD Key (CDKEY)

Enter the Infor EAM Requestor CD key.

Infor EAM Barcoding CD Key (7IBCDKEY)

Enter the Infor EAM Barcoding CD key.

User Lock Attempts (SECUIVOL)

Enter the number of consecutive password violations that can occur before a user is locked out of the system. The system administrator must unlock the user.

Mixed Case Passwords (PASSUPER)

Select Yes or No to indicate whether the system allows mixed case for password verification. If NO, the system does not use mixed case in password verification. If YES, the system uses mixed case in password verification.

Tab Save Behavior (TABSAVE)

Select Insert to return to Insert Mode after modifying a record on List/Detail tabs. Select Update to stay in Update Mode after modifying a record.

Database Name (DBNAME)

Enter your database name, i.e. "Production," "Development," or "Test."

Company Name (OURCOMP)

Enter the name that appears on reports.

Report Attachment Upload Directory (ADRDOCUP)

Enter the document upload directory.

Application Server URL (APPURL)

Enter the URL path for the application server.

E-mail Sender (SMTPSEND)

Enter the name of the e-mail sender used by Infor EAM.

E-mail Server (SMTPSERV)

Enter the name or IP address of the SMTP e-mail server.

Conversion Database Tablespace

Enter a separate data tablespace for all conversion data.

Conversion Index Tablespace

Enter a separate index tablespace for all conversion data.

Web User Authentication Method

Select the method for authenticating an Infor EAM web user. Select Standard to use the credential defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

Web Service Authentication Method

Select the method for authenticating an Infor EAM Connector web service user. Select Standard to use the credentials defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

Mobile User Authentication Method

Select the method for authenticating an Infor EAM Mobile user. Select Standard to use the credentials defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

Databridge Authentication Method

Select the method for authenticating an Infor EAM Databridge user. Select Standard to use the credentials defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

Enable/Disable KPI Driver

Click to enable or disable KPI driver.

Enable/Disable E-mail Driver

Click to enable or disable e-mail driver.

- 3 Click **Save Record**.

Defining equipment setup

Define equipment setup options to format the module to your specifications.

To define equipment setup:

- 1 Select **Administration > Equipment Setup**.
- 2 Specify this information:

Auto-number Assets (AUTOANUM)

Select Yes or No to indicate whether the system automatically generates asset numbers.

- 3 Click **Save Record**.

Defining equipment statuses for equipment setup

Define statuses for equipment. Equipment status indicates the state of the equipment listed.

To define equipment statuses for equipment setup:

1 Select **Administration > Equipment Setup**.

2 Click the **Equipment Statuses** tab.

3 Click **Add Status**.

4 Specify this information:

Status

Enter a user code for the equipment status, and then enter a description in the adjacent field.

System Status

Enter the system status. The system automatically populates the system status description.

System Default

Select to set the system default to the current code.

5 Click **Submit**.

Defining equipment types for equipment setup

Define types for equipment. Equipment types indicate the use of the equipment listed.

To define equipment types for equipment setup:

1 Select **Administration > Equipment Setup**.

2 Click the **Equipment Types** tab.

3 Click **Add Type**.

4 Specify this information:

Type

Enter a user code for the equipment type, and then enter a description in the adjacent field

System Type

Enter a code for the system type.

- A (Assets)
- C (Category)
- L (Location)
- S (System)

System Default

Select to set the system default to the current code.

5 Click **Submit**.

Defining equipment criticality for equipment setup

To define equipment criticality for equipment setup:

- 1 Select **Administration > Equipment Setup**.
- 2 Click the **Equipment Criticality** tab.
- 3 Click **Add Code**.
- 4 Specify this information:

Code

Enter a user code for the equipment criticality, and then enter a description in the adjacent field.

System Default

Select to set the system default to the current code.

- 5 Click **Submit**.

Defining purchasing setup

Define purchasing setup options to format the module to your specifications.

To define purchasing setup:

- 1 Select **Administration > Purchasing Setup**.
- 2 Specify this information:

Allow Over Receipt (OVERRECV)

Choose one of the following options to indicate whether the system allows for items to be purchased over the receipt limit:

- If Yes, allow to receive more than ordered.
- If No, do not allow to receive more than ordered.

Auto-populate Quantity to Receive (RECVAUTO)

Select Yes or No to indicate whether the system automatically populates the quantity to receive on the PO Receipt form

Default PO Receipt Description (DOCKDESC)

Enter the default PO receipt description.

Default Purchase Order Description (PORDDESC)

Enter the default purchase order description. Changing the value does not affect existing data.

Default Requisition Description (REQDESC)

Enter the default requisition description.

- 3 Click **Save Record**.

Defining expense types for purchasing setup

Define expense types for purchasing. Expense types indicate the use of the expense listed.

To define expense types for purchasing setup:

- 1 Select **Administration > Purchasing Setup**.
- 2 Click the **Expense Types** tab.
- 3 Click **Add Type**.
- 4 Specify this information:

Type

Enter a user code for the expense type, and then enter a description in the adjacent field.

System Default

Select to set the system default to the current code.

- 5 Click **Submit**.

Defining requisition statuses for purchasing setup

Define statuses for requisitions. These statuses indicate the state of the requisitions.

To define requisition statuses for purchasing setup:

- 1 Select **Administration > Purchasing Setup**.
- 2 Click the **Requisition Statuses** tab.
- 3 Click **Add Status**.
- 4 Specify this information:

Status

Enter a code for the requisition status, and then enter a description in the adjacent field.

System Type

Enter one of the following system types:

- A (Approved)
- C (Cancelled)
- R (Awaiting Approval)
- U (Unfinished)

System Default

Select to set the system default to the current code.

- 5 Click **Submit**.

Defining purchase order and transaction statuses for purchasing setup

Define statuses for purchase orders and transactions. These statuses indicate the state of the purchase orders and transactions.

To define purchase order and transaction statuses for purchasing setup:

- 1 Open the **Purchasing Setup** form.
- 2 Click the **PO and Transaction Statuses** tab.
- 3 Click **Add Status**.
- 4 Specify this information:

Status

Enter a user code for the purchase order and transaction status, and then enter a description in the adjacent field.

System Type

Enter one of the following system types:

- A (Approved)
- C (Cancelled)
- R (Awaiting Approval)
- U (Unfinished)

System Default

Select to set the system default to the current code.

- 5 Click **Submit**.

Defining materials setup

Define materials setup options to format the module to your specifications. These options were formerly defined as installation parameters.

To define material setup:

- 1 Select **Administration > Materials Setup**.
- 2 Specify this information:

Automatically Associate Parts (AUTOPART)

Select Yes or No to indicate whether the system automatically updates the Parts Associated list for equipment.

See the *Infor EAM User Guide*.

Note: Update the Parts Associated list for approved lines on a receipt. If AUTOPART is set to AUTO, the system verifies whether the received part is associated with an equipment's Parts Associated list when a purchase order receipt is approved for a work order. If the received part is not associated with the equipment's Parts Associated list, the system adds the part to the list using the quantity of the transaction as the Parts Associated quantity.

If the part is already associated on the Parts Associated list, the system updates the quantity of the part on the Parts Associated list to the transaction quantity if the transaction quantity is greater than the existing quantity on the Parts Associated list. If the transaction quantity is not greater, then the system does not make any updates. This association applies to issues, not just receipts.

Auto-number Parts (AUTOPNUM)

Select Yes or No to indicate whether the system automatically generates part numbers.

Default Transaction Description (TRANDESC)

Enter the default transaction description.

- 3 Click **Save Record**.

Defining work setup

Define work setup options to format the module to your specifications.

To define work setup:

- 1 Select **Administration > Work Setup**.
- 2 Specify this information:

Book Days (COMDAYS)

Enter the number of days during which you can book hours on closed work orders. Infor recommends a minimum value of 1. Changing the value does not affect existing data.

Issue Days (ISSDAYS)

Enter the number of days for which issues can be made after you close a work order. Valid values are any non-negative numbers. Changing the value does not affect existing data.

Return Days (RTNDAYS)

Enter the number of days that parts can be returned to the store after the work order has been closed. Valid values are any non-negative numbers. Changing the value does not affect existing data.

Tool Days (TOOLDAYS)

Enter the number of days to update tool usage costs after completion of a work order.

Non-Work Order Days (NPRDAYS)

Enter the number of days for which you can book past nonproductive hours, which is labor performed without a work order. Changing the value does not affect existing data.

Cascade Work Order Status (EVTCASCD)

Select Yes or No to indicate whether changing a parent work order's status to Closed or Cancelled causes the status of child work orders also to change.

Enforce Work Order Dates (BOOKDATE)

Select Yes or No to indicate whether to enforce date constraints when booking hours. If set to No, the system ignores the constraints. If set to Yes, the system enforces the constraints.

Note: Setting this parameter OFF may result in inconsistencies within your booked hours data.

- 3 Click **Save Record**.

Defining work order priorities for work setup

Define work order priorities. These priorities indicate the order in which work orders should be completed.

To define work order priorities for work setup:

- 1 Select **Administration > Work Setup**.
- 2 Click the **Work Order Priorities** tab.
- 3 Click **Add Code**.
- 4 Specify this information:

Code

Enter a user code for the work order priority, and then enter a description in the adjacent field.

System Default

Select to set the system default to the current code.

- 5 Click **Submit**.

Defining work order statuses for work setup

Define work order statuses. These statuses indicate the state of existing work orders.

To define work order statuses for work setup:

- 1 Select **Administration > Work Setup**.
- 2 Click the **Work Order Statuses** tab.
- 3 Click **Add Status**.
- 4 Specify this information:

Status

Enter a user code for the work order status, and then enter a description in the adjacent field.

- A (Approved)

- C (Cancelled)
- R (Awaiting Approval)
- U (Unfinished)

System Status

Enter a code for the system status. The system automatically populates the system status description.

System Default

Select to set the system default to the current code.

- 5** Click **Submit**.

Defining work order types for work setup

Define work order types. These types indicate the condition of existing work orders.

To define work order types for work setup:

- 1** Select **Administration > Work Setup**.
- 2** Click the **Work Order Types** tab.
- 3** Click **Add Type**.
- 4** Specify this information:

Type

Enter a user code for the work order type, and then enter a description in the adjacent field.

System Type

Enter a code for the system type.

- A (Assets)
- C (Category)
- L (Location)
- S (System)

System Default

Select to set the system default to the current code.

- 5** Click **Submit**.

Installation parameters



The tables in this appendix display a list of parameters for Infor EAM and the add-on products available for Infor EAM including the installation code, an example of a valid parameter value, and a description of how the system uses the code.

Note: This chapter describes Infor EAM functions that only a system administrator has rights to perform.

Understanding installation parameters

During the Infor EAM installation process, installation parameters enable different modules/system components and establish many default values for your system, such as multi-organization security, part pricing, etc. Part of the installation process involves running scripts that set these default values in the Infor EAM database, and many of the scripts contain values known as installation codes or parameters.

This appendix contains a complete listing of all the installation parameters used for Infor EAM broken down by modules, as well as codes related to add-on modules and other advanced system features.

Many of the parameters set during installation are "fixed," which means that once the parameter is set, the value/setting of the parameter cannot be changed or modified. Fixed parameters are also designated in the tables below.

Unless otherwise indicated, all non-fixed parameters can be set as necessary following the Infor EAM installation to tailor your system environment.

See "Defining installation parameters" on page 15.

Barcode parameters

Barcoding is an add-on module for both Infor EAM (Oracle Forms) and/or Infor EAM that enables you to design and print barcode labels for assets, parts, work orders, etc.

Set values for barcode parameters according to the following table.

Installation parameters

For more information on setting values for parameters, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
BARCODB	B	This code indicates the prefix of the bar-code bin.	Yes
BARCODL	L	This code indicates the prefix of the bar-code lot.	Yes
BARCODN	N	This code indicates the prefix of the serial number of the barcode equipment.	Yes
BARCODO	O	This code indicates the prefix of the bar-code equipment.	Yes
BARCODP	P	This code indicates the prefix of the bar-code part.	Yes
BARCODS	S	This code indicates the prefix of the bar-code store.	Yes
BARCODV	V	This code indicates the prefix of the bar-code physical inventory.	Yes
BARCODW	W	This code indicates the prefix of barcode of work order and activity.	Yes
BARFILL	#	Single-character filler between a work order and activity bar code	No

Base parameters

Base parameters are related to core system components and features that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly. Base parameters also include settings for Databridge.

Set values for base parameters according to the following table.

For more information on setting values for parameters, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
\$BTRACE	No	Enables the <code>BAIM</code> trace utility. Set the parameter to <code>Yes</code> to enable the trace functionality. Set the parameter to <code>No</code> to disable the trace functionality. The default value for this parameter is <code>No</code> and should only be set to <code>Yes</code> at the request of a customer support technician.	No

Code	Example	Description	Fixed
\$CATSF	1	Financial Parameter for Category code for type SF	No
\$CATSH	1	Financial Parameter for Category code for type SH	No
\$CATST	1	Financial Parameter for Category code for type ST	No
\$LTRCDIR	F:\BAIMTRACE	Identifies the trace file directory created on the Infor EAM server for the insertion of trace files for local transactions The value used in this parameter should be from the perspective of someone looking at a command prompt on the server. Do not use the value of a mapped drive.	No
\$REQNUM	YES	Parameter for Requisition Number from Infor EAM to be sent to APPS	No
\$RTRCDIR	F:\BAIMTRACE	Identifies the trace file directory created on the Oracle Applications server for the insertion of trace files for remote transactions You must only specify a value for \$RTRCDIR for implementations in a distributed environment. The value used in this parameter should be from the perspective of someone looking at a command prompt on the server. Do not use the value of a mapped drive.	No
\$SERVUOM	EA	Unit of Measure for Service types to be sent to APPS	No
\$SFLTYPE	1	Financial Parameter for Line type for type SF	No
\$STLTYPE	1	Financial Parameter for Line type for type SH, ST	No
@ADDPO	Y	This code indicates whether the Databridge Add PO (Outbound) transaction is activated.	No
@AD-DREQ	Y	This code indicates whether the Databridge Add Requisition transaction is activated.	No
@CANPO	Y	This code indicates whether the Databridge Cancel PO (Outbound) transaction is activated.	No
@CAN-PORL	N	This code indicates whether the Databridge Cancel requisition lines for Cancel PO (Inbound) transaction is activated.	No

Installation parameters

Code	Example	Description	Fixed
@CAN-REQ	Y	This code indicates whether the Databridge Cancel Requisition transaction is activated.	No
@CHGPO	Y	This code indicates whether the Databridge Change PO (Outbound) transaction is activated.	No
@CHGREQ	Y	This code indicates whether the Databridge Change Requisition activated.	No
@DBPID	2	Databridge <code>DUNS+4</code> partner ID	Yes
@DOCK-REC	N	Indicates whether the Databridge Receive-PO transaction will support on-dock receipts. Set to <code>Y</code> to enable on-dock receipts for the ReceivePO transaction.	No
@HMSINT	NO	Infor EAM is integrated with Infor HMS. Enter <code>YES</code> if integrated. Enter <code>NO</code> if not integrated.	No
@LDPAY	Y	This code indicates whether the Databridge Load Payable (Outbound) transaction is activated.	No
@NEWACT	N	This code indicates whether to automatically create an activity when <code>INFOREAM.ACT</code> tag is null.	No
@NEW-PART	N	This code indicates whether to automatically create a new part when <code>ITEM</code> tag is null.	No
@NIT-MOUT	N	This code indicates whether the Databridge Sync Item (Outbound) transaction exports temporary parts.	No
@PORECV	Y	This code indicates whether the Databridge Receive PO (Outbound) transaction is activated.	No
@SYNCITM	Y	This code indicates whether the Databridge Sync Item (Outbound) transaction is activated.	No
@SYNCPRJ	Y	This code indicates whether the Databridge Sync Proj Info (Outbound) transaction is activated.	No
@SYN-CRES	Y	This code indicates whether the Databridge Sync Reservation transaction is activated.	No
@SYNC-WO	Y	This code indicates whether the Databridge Sync Maint Order transaction is activated.	No

Code	Example	Description	Fixed
@UPDINV	Y	This code indicates whether the Databridge Update Invy (Outbound) transaction is activated.	No
@UP-DPTM	Y	This code indicates whether the Databridge Update person time (Outbound) transaction is activated	No
~ QUEUES~	1	Number of concurrent queues	No
~SLEEP~	15	This code indicates the interval time (in seconds) for the BDRV driver.	No
~SLEEPB0	86400	This code indicates the interval time (in seconds) for BDRV queue 0.	No
~SLEEPT0	3600	This code indicates the interval time (in seconds) for TDRV queue 0.	No
7IACDKEY	000-0000-00000-XXXX	Infor EAM CD key	No
7IBCDKEY	000-0000-00000-0000	Infor EAM Barcode module CD key	No
7ICCDKEY	000-0000-00000-XXXX	Infor EAM Reports Consumer CD Key	No
7IMCDKEY	000-0000-00000-000A	Infor EAM Mobile CD key	No
7IPCDKEY	000-0000-00000-XXXX	Infor EAM Reports Author CD Key	No
7IWCD- KEY	000-0000-00000-000C	Infor EAM Mobile CD key	No
ACCOUNT	YES	This code indicates whether accounting information is to be upgraded to use the DR/CR format (YES) or uses * for all accounts (NO).	No
ADVREPT	YES	Indicates whether you are using the Infor EAM Advanced Reporting or another reporting product. Set to YES to indicate that you are using the Advanced Reporting Module. Set to NO if you are using another reporting product or Crystal Clear Reporting.	No
AMSG- COST	250	Indicates the maximum allowable SQL score for Alert Management grid Dataspies.	No
APPLGWH	25x25	Specifies the width and height of the image displayed on the header of the application in widthxheight format.	No
APPLOGO	http://google.com/image.gif	Determines the image displayed on the header of the application. Specify the URL	

Installation parameters

Code	Example	Description	Fixed
		location of the image to display it. Leave blank to use the default image. Note: If a value is specified, Infor strongly recommends also setting a value for AP-PLGWH.	
APPNAME	Infor EAM	Determines the application name displayed on the login page and the header of the application. 1 To display the default application name, leave blank. 2 To exclude or not display an application name, enter a hyphen. 3 To display an alternate application name, specify it.	No
ARCHTIME	2	This code indicates the time of day at which the archiving process runs. Values are in 24-hour time (0-23). The default is '2' (2:00 A.M.) Leave this value blank to execute the archiving process immediately.	No
ARCREC	NO	This code indicates whether Infor EAM stores error records from the data collection module in table R5ARCINTERRORS. If set to YES, the system stores the records in R5ARCINTERRORS. If set to NO, the system does not store the records.	No
ASDEP-TYP	SL	Default depreciation method: This code indicates the default depreciation method for asset depreciation. However, you can also set the depreciation method at the organization level. SL= straight line SYD=sum of years digits DDB=double declining balance UOO= units of output	No
AU-TOANUM	NO	This code indicates whether Infor EAM automatically generates asset numbers.	-
AUTOKB-NM	NO	This code indicates whether the system automatically generates knowledge base article codes. Valid values are 'YES' and 'NO.'	No

Code	Example	Description	Fixed
BRETRIES	5	Maximum number of retries in the <code>BDRV</code> driver.	No
CASCADE	YES	This code indicates whether cascading occurs for cost code changes made on the equipment forms (Asset, Position, System) to the Equipment tab of the PM form.	No
CDKEY	000-00A0-00000-B0C0	CD key code. Enter the number from the CD label in <code>MP5SET.SQL</code> when installing the Infor EAM Oracle database.	No
CD-KEYREQ	000-00A0-00000-B0C0	Infor EAM Requestor CD key code.	No
CGMPONLY	NO	<p>This code indicates whether Infor EAM will create an electronic record and/or require an electronic signature for work performed on <code>cGMP</code> equipment. To configure electronic records and signatures for <code>cGMP</code> equipment, you must set this parameter to <code>YES</code> and set up electronic records and signatures for the <code>EVNT</code> entity.</p> <p>If <code>CGMPONLY</code> is set to <code>YES</code> and you have configured electronic records/signatures for the <code>EVNT</code> entity, Infor EAM will only create an electronic record and/or require an electronic signature for any work orders created for <code>cGMP</code> equipment.</p> <p>If <code>CGMPONLY</code> is set to <code>NO</code> and you have configured electronic records and signatures for the <code>EVNT</code> entity, Infor EAM will create electronic records and/or require an electronic signature for all work performed on any equipment.</p>	No
CMORGALL	*	Select <code>Yes</code> to add all common Org.'s to the new users, and to attach a new common Org. to all users. Select <code>No</code> if you don't want to add all common Org.'s to the new users, and you do not want to attach a new common Org. to all users. Select <code>*</code> to add <code>*</code> common Org.'s to the new users, and to attach a new <code>*</code> common Org. to all users.	No
CSV-DATEF	YYYY-MM-DD	CSV Export date format. This is the java format of the date fields to be exported.	No

Installation parameters

Code	Example	Description	Fixed
DBNAME	Production	This code identifies your database, such as 'Production', 'Development' or 'TEST'. The install parameter also supports the use of four standard variables: MP5USER, :MP5DFLTOORG, :MP5GROUP, and :MP5ORG.	No
DEF-CALLR	4	This code defines the default value for Find Caller By on Service Request. 1 = E-mail, 2 = Customer, 3 = Name, 4 = Phone. Valid values are 1, 2, 3, and 4.	No
DEFCURR	EUR	Base currency. All rates for other currencies refer to this default currency. Do not change this setting once in use. After you set this default, you cannot change it without introducing inconsistencies to the database.	No
DEFLANG	FR	Base language. Infor EAM uses this parameter during installation. Do not change this setting once in use. After installation, you cannot change this value because Infor EAM cannot retrieve certain system records in an alternative language.	Yes
DEFORG	*	Default Organization value for entities with multi-organization security set to OFF.	Yes
DUAL-CURR	EUR	Dual currency. EUR indicates whether to use the triangular conversion method to convert currency amounts to and from EURO currency.	No
ENXHOST		ENX Suite Host URL (e.g. http://server-name:8080/enxsuite)	No
EPAKURL	http://www.google.com/?what=yes	URL path for the EPAK server. This path will be used to display EPAK content for Infor EAM.	No
ES-MONTHS	3	Number of months for which to (re)calculate Energy Star readings. For example, if the current month is May and the number of months is set to 3, then readings will be created for February, March, and April.	No
FAAMOD	OFF	This code indicates whether the user must enter a Certification Number and Certification Type for electronic signatures, which are required by the Federal Aviation Administration (FAA) for electronic signatures.	No

Code	Example	Description	Fixed
		Certification numbers and types are associated with employee records on the Qualifications tab of the Employee form.	
FLXAUDIT	999999	This number determines the number of milliseconds after which the performance of Flex statements will be audited if the statement takes longer.	No
FRONTPG	YES	Print front page code. This code indicates the default value for Include Front Page on the Print dialog box. The default value for this parameter is YES. If the parameter is set to YES, Include Front Page is selected by default. If the parameter is set to NO, Include Front Page is unselected by default.	No
GRID-COST	100	SQL score for Dataspys	No
HOSTED	-	This code indicates whether the installation is hosted.	Yes
HTML-COMM	OFF	Set to ON to display the HTML editor bar on the Comments page. Set to OFF to hide the HTML editor bar.	No
IDMSRVR	IDM URL(e.g. https://server-name:8080/ca/)	URL of the Infor Document Manager application server.	No
INBXS-COR	100	SQL score for inbox queries. The setting of this parameter determines whether or not the system will allow inbox queries to run that do not have a sufficient score.	No
INCR LINO	1	Increment value. Enter the value by which to increase the line number when automatic line numbering is activated.	No
INSPCFV	NO	Indicates whether to use the inspection type C, F, V in Infor EAM Mobile. Valid values are YES or NO.	No
INSTCODE	YD04O5VXVXY2	Installation code. Infor EAM uses it for several internal checks. Do not change this code. Infor EAM will not function if you modify this code.	Yes
KEEPBOT	+	Keep boiler texts. A + value indicates Infor EAM will not overwrite user-adapted boiler texts when you upgrade the system.	No

Installation parameters

Code	Example	Description	Fixed
KPISCOR	100	SQL score for KPI queries.	No
KPISLEEP	1	Enter, in days, how often the KPI driver (KDRV) checks for data to process. Must be a positive integer.	No
LDAP-PATH	OFF	Enables the LDAP server component for Infor EAM.	No
LDAPSERV	http://myserver.mycompany.com:8080/oc4jldap/LDAPAuth	The URL identifying the location of the LDAP servlet.	No
LGNCN	STD	This code stores the login authentication method used for the Infor EAM Connector(web services) users. Set to <code>STD</code> to use the credential defined on user records within EAM. Set to <code>LDAP</code> to use the credential defined in the LDAP provider configured for the EAM deployment. Set to <code>EXT</code> to use an external authentication service configured for the EAM deployment.	No
LGNDDBR	STD	This code stores the login authentication method used for Databridge users. Set to <code>STD</code> to use the credential defined on user records within EAM. Set to <code>LDAP</code> to use the credential defined in the LDAP provider configured for the EAM deployment. Set to <code>EXT</code> to use an external authentication service configured for the EAM deployment.	No
LGNDISCL		Specifies the text displayed on the login page. This message can include html tags.	No
LGNEAM	STD	This code stores the login authentication method used for EAM web users. Set to <code>STD</code> to use the credential defined on user records within EAM. Set to <code>LDAP</code> to use the credential defined in the LDAP provider configured for the EAM deployment. Set to <code>EXT</code> to use an external authentication service configured for the EAM deployment.	No
LGNLOGO	http://www.google.com/image.gif	Determines the image displayed on the login page. Specify a URL location of the image to display it. Leave blank to use the default image.	No
LGNMOB	STD	This code stores the login authentication method used for Infor EAM Mobile users. Set to <code>STD</code> to use the credential defined on	No

Code	Example	Description	Fixed
		user records within EAM. Set to <code>LDAP</code> to use the credential defined in the LDAP provider configured for the EAM deployment. Set to <code>EXT</code> to use an external authentication service configured for the EAM deployment.	
LOCALE	NAMERICA	This code identifies the number format to use based on the geographic location of your organization/enterprise. The setting for this code specifies that Infor EAM use the geographic standard for the specified locale regarding the use of decimals and commas in numeric data for all numeric fields. Valid values are <code>NAMERICA</code> , <code>EUROPE</code> , and <code>ASI</code> . Use the credential defined on user records within EAM.	No
MFA-CLASS	No default value	Specify the full package Java class name of the customer implementation for multi-factor authentication.	No
MOB-DOCUL	DATETIME	Specify a suffix that will be appended to the document file name when uploaded from the mobile device to the Infor EAM server. This is done to better ensure uniqueness and help prevent files from being overwritten on subsequent uploads. Valid values are acceptable using comma separation. Default is <code>DATETIME</code> .	No
MOBORG	NO	This code indicates the Infor EAM Mobile organization downloading mode. Set <code>MOBORG</code> to <code>YES</code> for multiple organization mode, or <code>NO</code> for single organization mode.	No
MULTIFAC	OFF	Set to <code>ON</code> to enable the ability to enter an authentication code in addition to the password on the login screen. Custom configuration is required to enable this option. Set to <code>OFF</code> to hide the additional field and only require user name and password.	No
MULTI-ORG	YES	This code indicates whether Multi-Organization Security (MOS) is activated. You cannot turn off MOS.	Yes
OM-BARFMT	NO	This code indicates whether a code and organization are separated with parentheses in Infor EAM Barcode. Valid values are <code>YES</code> or <code>NO</code> .	No

Installation parameters

Code	Example	Description	Fixed
OPEN-MENU	H	This code indicates whether users open the main menu by hovering or clicking. Set to H to default the system to open the menu drop-down when the user hovers the mouse over the main menu bar. Set to C to default the system to open the menu drop-down when the user clicks on the main menu bar. Navigation inside the menu defaults to hover regardless of this setting.	No
OUR-COMP	Your company	Customer name that appears on reports. Modify this code as necessary.	No
PASSMINL	6	Indicates the minimum number of characters allowed for a system password.	No
PASSMAN	0	Indicates the minimum number of non-alphanumeric characters required for a password.	No
PASSMNL	0	Indicates the minimum number of lowercase characters required for a password.	No
PASSMNB	0	Indicates the minimum number of numerical characters required for a password.	No
PASSM-NUP	0	Indicates the minimum number of uppercase characters required for a password.	No
PASSRSET	YES	Determines if the Password Reset option will be displayed on the Login screen. If enabled, the system will require the user to enter a valid User ID for which to reset the password. If an email address is specified for the User ID , then the user's password will be reset to a random value and also set to expired. This will require the user to change their password as soon as they login using the system generated password. This option will only work for full EAM users, Infor EAM Requestor users and Mobile users.	No
PASSSAID	YES	Indicates whether the User ID can be used as their password. Valid values are YES or NO .	No
PASSU-PER	YES	Indicates whether system allows mixed case for password verification. If set to YES , the system does not use mixed case in password verification. If set to NO , the system uses mixed case in password verification.	No

Code	Example	Description	Fixed
PMFS- NDEL	30	Indicates the number of days a PM Forecasting session in which forecasting has not been started or a WO Labor Scheduling session in which labor has not been started will be saved. Sessions where forecasting or labor scheduling have begun will be saved until the session is Cancelled or Approved.	No
PRMD- SPLY	MULTIPLE	Indicates the number of Infor EAM Mobile prompts displayed. If set to <code>SINGLE</code> , the system displays Infor EAM Mobile Prompt in Single Field mode. If set to <code>MULTIPLE</code> , the system displays Infor EAM Mobile Prompt in Multiple Fields mode.	No
PM- RVSIGN		This code indicates whether both electronic signature and snapshot are required for PM Revision Control. ES = both electronic signature and snapshot required ER = only snapshot	No
PROD- NAME	Infor EAM	Name of the product installed. You can modify this code as necessary.	No
PROD- UCTS	D7I	Name of the products used. Values are as follows: EXTSQL, If you are using Infor EAM for SQL Server only EXTORCL, If you are using Infor EAM (Oracle) only D7I, If you are using the Forms interface only BOTH, If you are using both Forms interface and Extended interface	No
QUICKDEF	B	This code sets the default value for the Operator field on the Quick Filter portion of the Search Bar and Dataspies. Set <code>QUICKDEF</code> to <code>B</code> for Begins with and <code>C</code> for Contains. Applies to text fields only.	No
REFRSH- LV	YES	Set to <code>YES</code> to designate the system to refresh the data when users return to the List View page from the Record View page or any other tab. Set to <code>NO</code> to designate the system to not refresh the List View page.	No

Installation parameters

Code	Example	Description	Fixed
REP-BATCH	NO	This code indicates whether to print reports on the server printer (YES) or on the client printer (NO). Note: Infor EAM always treats this parameter as set to NO.	No
REPSERV	rep78	The name of the default Oracle report server. Do not use underscores (_) or numbers in the name.	No
REPSTOL	10	The amount of time in minutes a report is kept in cache for reuse.	No
RMTMOUT	20	Time out setting for Infor EAM Mobile Real-time web service request, (in seconds).	No
SAFE-WARN	NO	Equipment safety warning for Infor EAM Mobile. See Infor EAM Mobile documentation.	No
SCN-CACHL	OFF	Controls whether a screen with caching Enabled will open to the List View or to the last tab selected prior to leaving the screen. Set to ON to return to the List View. Set to OFF to return to the last tab selected.	No
SDATE	NO	This code determines the transaction date Infor EAM uses for recording/approving a physical inventory in the R5TRANSACTIONS table and the R5TRANSLINES table. For example, if you start your count on Monday and finish it on Wednesday, this parameter determines which date is recorded. If YES, the system records the start date. If NO, Infor EAM uses the date the count is approved.	Yes
SECUP-WEP	30	Number of days in the password expiration period. You can change this value.	No
SECUP-WRP	180	Number of days before a user can reuse an expired password. You can change this value.	No
SECUVIOL	5	Number of consecutive password violations that can occur before a user is locked out of Infor EAM. You can change this value. The system administrator can also unlock the user.	No
SESINTVL	15	Must be set to support multiple application servers.	No

Code	Example	Description	Fixed
		<p>The value specified for this parameter represents a number in minutes.</p> <p>If a session remains inactive for the number of minutes specified for this install parameter, the system will kill the session.</p> <p>Note: The system actually doubles the value specified for this parameter setting to create a buffer to ensure that a valid session is not killed.</p> <p>Also, if a value of less than 5 is specified, the system assumes a value of 5 minutes as the setting for the parameter.</p>	
SHOWQUERY	NO	This code indicates whether to show the query fields on grids by default. Set <code>SHOWQUERY</code> to <code>YES</code> to show the query fields on grids by default, or set to <code>NO</code> to hide the query fields on grids by default.	No
SPECJS	NO	Set <code>SPECJS</code> to <code>YES</code> to use the tenant specified language <code>js</code> file. Set <code>SPECJS</code> to <code>NO</code> to use the common language <code>js</code> file.	Yes
SRDFLTID		Service Request Portal Default ID. Enter the Portal ID that will be used for guests. This Portal ID must have an existing contact information record.	No
STYLECD	default	Identifies the custom web style sheet and associated images.	No
TABSAVE	INSERT	Set <code>TABSAVE</code> to <code>INSERT</code> to return to Insert Mode after modifying a record on List/Detail tabs. Set <code>TABSAVE</code> to <code>UPDATE</code> to stay in Update Mode after modifying a record.	No
TRAN-DESC	Transaction	Transaction description. Changing the value does not affect existing data.	No
UCOLANG	EN	Language code of default user code. Do not change this setting once in use.	Yes
UPLNXS		This code identifies a separate index tablespace for all conversion data uploaded.	No
UPLTBS		This code identifies a separate data tablespace for all conversion data uploaded.	No
WO-BARFMT	NO	This code indicates whether work order barcodes are printed in <code>WO#ACT</code> format. Valid values are <code>YES</code> or <code>NO</code> .	No

Installation parameters

Code	Example	Description	Fixed
WSGRID-SZ	10000	This code indicates the maximum number of rows returned per block for web service grid.	No
XFR-MOPTN	Null (disabled)	To set the X-FRAME-OPTIONS http header, No set this install parameter to one of the following values: DENY, SAMEORIGIN, or ALLOW-FROM someurl. Setting this value protects against certain security vulnerabilities (clickjacking) by preventing Infor EAM from running in an iframe.	No

Infor EAM parameters

Infor EAM parameters are related only to Infor EAM and do not affect Infor EAM (Oracle Forms).

Set values for Infor EAM parameters according to the following table.

For more information on setting values for parameters, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
ANALOG	INFO	Analytics logging level. Valid values are: ERROR, WARN, INFO, or DEBUG.	No
ANALOGKP	7	Number of days to keep Analytics server log records.	No
ANASYNKP	180	Number of days to keep Analytics synchronization records.	No
AUTOSAVE	YES	This code indicates whether to save work automatically when moving from tab to tab in Infor EAM. Valid values are YES and NO. If set to NO, then Infor EAM displays a message prompting the user to save their work when moving from tab to tab.	No
CANCSTAT	CANC	This code indicates the status used by Infor EAM when a work order is cancelled. You can choose from any equivalent user statuses.	No
DBBUFSIZ	500	Cache size for grid query results	No
DWLABOR	ON	Indicates whether the data warehouse ETL driver will populate the Booked Labor hours and Available Labor data mart. Valid values are ON and OFF.	No

Code	Example	Description	Fixed
DWMATL	ON	Indicates whether the data warehouse ETL driver will populate the Daily Material transactions data mart. Valid values are ON and OFF.	No
DWORDERS	ON	Indicates whether the data warehouse ETL driver will populate the Purchase orders and order lines data mart. Valid values are ON and OFF.	No
DWPARTS	ON	Indicates whether the data warehouse ETL driver will populate the Parts and Stores daily values data mart. Valid values are ON and OFF.	No
DWSTATUS	ON	Indicates whether the data warehouse ETL driver will populate the Daily Status Changes data mart. Valid values are ON and OFF.	No
DWWARNTY	ON	Indicates whether the data warehouse ETL driver will populate the Warranty claims accumulating values data mart. Valid values are ON and OFF.	No
DWORK	ON	Indicates whether the data warehouse ETL driver will populate the Work orders accumulating and daily values data mart. Valid values are ON and OFF.	No
EQUIPSTR	C	Define which fields will display in equipment structure. Valid values are B, C, or D. Enter B to display both the code and description. Enter C to display only the code. Enter D to display only the description.	No
REJSTAT	REJ	This code indicates the status used by Infor EAM when a work request is rejected. You can choose from any equivalent user statuses.	No
REPCLEAN	240	Specifies how long in minutes that report temporary data will remain.	No
REPORTMX	100	The maximum number of records that can be returned to the work order, requisition, and purchase order reports in Infor EAM without causing an error.	No
REPPURGE	1440	This code indicates the amount of time (in minutes) to keep an Infor EAM report output file on the server before deleting it.	No
RTIMEOUT	120	This code indicates the amount of time (in seconds) to wait for a report to finish executing before sending it to the report queue.	No
SHOWLOT	Y	Determines whether lots are used for stock information for parts in Infor EAM. The default setting for SHOWLOT is Y. If SHOWLOT is set to N, Extended disables the Lot field and it is hidden on forms.	No

Installation parameters

Code	Example	Description	Fixed
SRQREP	5	This code indicates the number of days to search for similar requests. Infor EAM flags similar services requests that are repeated.	No
WHSLEEP	24	This code indicates the time increment (in hours) between each data warehouse ETL procedure update. The default value is 24.	No
WHSTART	2:00	This code indicates the specific time at which to run the data warehouse ETL update (based on the server time). Enter in the format HH:MM, where HH is 24 hour time, MM is minutes. The default value is 2:00 (2AM).	No
WLSUPP		Contains a comma separated list of supported Language strings that are encrypted.	No
WTIMEOUT	15	<p>The value specified for this parameter indicates the length of time (in minutes) that the client can remain idle/inactive before the server terminates the user's session for both Infor EAM (Oracle Forms) and Infor EAM. After the server terminates the session in Infor EAM (Oracle Forms), the system displays a message indicating that the user's session is being terminated. After acknowledging the message, the server shuts down the Infor EAM application.</p> <p>After the server terminates the session in Infor EAM, the form on which the user was working is still displayed. However, when the user tries again to use the system, the system displays a message and returns to the login screen.</p>	No

GIS parameters

GIS functionality is a feature of Infor EAM only. All of the parameters listed in this section are used only by Infor EAM for GIS Integration. You cannot integrate GIS with Infor EAM (Oracle Forms).

Set values for GIS parameters according to the following table.

See "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
GISABLC	3	This code identifies the maximum number of advanced buffer layers allowed. The default is 3.	No

Code	Example	Description	Fixed
GISADDR	Streets	Name of the Address Layer in the Image Service setup in the <code>GISSERV</code> install parameter.	No
GISAIMSP	SHAPEFILE	This code indicates the ArcIMS platform. Acceptable values are <code>SHAPEFILE</code> and <code>SDE</code> .	No
GISAIMSV	9.0	This code indicates the ArcIMS version. Acceptable values are <code>4.01</code> and <code>9.0</code> .	No
GISBASEM	Streets	Determines the default ESRI base map that will be used when displaying maps. The REST endpoint specified in parameter <code>GISSERV</code> will overlay the base map. Valid values are: Streets, Imagery, Imagery with Labels, Terrain with Labels, Topographic, Light Gray Canvas, Dark Gray Canvas, Oceans, National Geographic, and Open Streetmap.	No
GISCCCOL		This code indicates the name of the City or Zone Column in the attributes of the City or Zone Layer. This parameter is used when a user searches by specifying the City or Zone name only.	No
GISCITY		This code indicates the name of the City or Zone Layer in the Image Service setup as the <code>GISSERV</code> install parameter. This parameter is used when a user searches by specifying the Zone name only.	No
GISCONTTP	TCP	Type of GIS connection. This code indicates the connection type between the Infor EAM application server and the ArcIMS server. Valid values are <code>TCP</code> , <code>HTTP</code> , or <code>HTTPS</code> . If no value is specified, a <code>TCP</code> connection is assumed.	No
GISCTCOL		This code indicates the name of the Zone Column in Attributes of the Address Layer.	No
GISDREL	L	Indicates the manner in which the system should display boundary labels for linear equipment (referred to as "routes" in GIS). Valid values are <code>L</code> , <code>N</code> , and <code>A</code> . The default is <code>L</code> . If set to <code>L</code> , the system displays boundary labels for the longest path (in the event of multiple route paths). If set to <code>N</code> , the system displays no boundary labels.	No

Installation parameters

Code	Example	Description	Fixed
		If set to <code>A</code> , the system displays boundary labels for all paths (in the event of multiple route paths).	
GISEQUIP	Hydrant	Default equipment layer name. This code indicates the name of the Asset Layer in the Image Service setup in the <code>GISSERV</code> install parameter.	No
GISGEOSV	WATER_AXL2, WATER_AXL3	This code indicates the name of the secondary Image Service setup on the ArcIMS server. See the explanation of the <code>GISSERV</code> parameter later in this section for the default Image Service setup. Separate values with a comma to enter multiple geocode services, e.g., <code>Service2, Service3, Service4</code> .	No
GISGMAXC	100	This code indicates the maximum number of geocoding match candidates. The default is <code>100</code> .	No
GISGMIN	20,0,100	This code indicates the minimum geocoding score that the system should display in the Matching Addressess popup. The default is <code>20</code> . Separate multiple geocoding score values with a comma. The first value listed is the score for <code>GISSERV</code> and subsequent entries are values for each <code>GISGEOSV</code> .	No
GISHOST	gisone	GIS server name. This code indicates the host name (and domain if required) of the machine running arcIMS. The URL must be accessible from the Infor EAM server. Do not include <code>http://</code> in the URL.	No
GISINTRS	& @	Intersection address searching symbols (default <code>& @</code>). Values should be separated by a space.	No
GISLNCOL	0,255,197	GIS line RGB color (default <code>0, 255, 197</code>). This code indicates the color used for lines in the GIS map by entering an RGB color of <code>0</code> to <code>255</code> .	No
GISLNWID	4	Specify the width of highlighted lines in the GIS map, or enter <code>LAYERDEFINED</code> . Note: For more information about the <code>LAYERDEFINED</code> value, see "Customizing Map Symbols" in the <i>Infor EAM User Guide</i> .	No
GISMAPS	Global	Set to <code>Global</code> to display a single map in Infor EAM based on GIS installation parameters. Set to <code>Organization</code> to display	No

Code	Example	Description	Fixed
		maps based on Organization. Set to Department to display maps based on Department. Department Security must be enabled when set to Department.	
GISNARAD	1500	Specify the radius, in meters, used for viewing nearest address. The default value is 1500.	No
GISMLCOL	255,55,155	GIS markup line RGB color (default 255, 55, 155)	No
GISMLWID	4	GIS markup line width (default 4)	No
GISMPCOL	255,55,155	GIS markup point RGB color (default 255, 55, 155)	No
GISMPTYP	CROSS	Specify the type of the markup point. Acceptable values are CIRCLE, STAR,CROSS, SQUARE, TRIANGLE, or RASTERMARKER. Note: See "Customizing Map Symbols".	No
GISMPWID	15	GIS markup point width (default 15)	No
GISOVSV	WATER_AXL_OV	Specify the image displayed within the overview map. The default is the default extent of the current map.	No
GISOVSZ	25	Specify the size of the overview map. The number you enter represents a percentage of the width of the current map. The default is 25.	No
GISPLYBC	255,0,0	GIS polygon boundary RGB color (default 255, 0, 0). This code indicates the color used for the boundary of highlighted polygons in the GIS map by entering an RGB color of 0 to 255.	No
GISPLYCL	0,255,197	GIS polygon fill RGB color (default 0, 255, 197). This code indicates the fill color used for highlighted polygons in the GIS map by entering an RGB color of 0 to 255.	No
GISPLYFT	CROSS	GIS polygon fill type. This code indicates the fill type of highlighted polygons in the GIS map. Valid values are HORIZONTAL, BDIAGONAL, CROSS, DIAGCROSS, FDIAGONAL, or VERTICAL.	No
GISPLYTR	1	GIS polygon fill transparency (default 1.0). This code indicates the transparency level of the color fill of highlighted polygons in the GIS map.	No

Installation parameters

Code	Example	Description	Fixed
GISPORT	5300	GIS server port. This code indicates the port number on which the ArcIMS service mentioned in the <code>GISSERV</code> install parameter is accessed.	No
GISPTCOL	0,255,197	GIS point RGB color (default 0, 255, 197). This code indicates the color used for points in the GIS map by entering an RGB color of 0 to 255.	No
GISPTTYP	CIRCLE	This code indicates the point type in the GIS map. Valid values are <code>STAR</code> , <code>CIRCLE</code> , <code>CROSS</code> , <code>SQUARE</code> , <code>TRIANGLE</code> , <code>RASTERMARKER</code> , or <code>LAYERDEFINED</code> . Note: See "Customizing map symbols" on page 175.	No
GISPTWID	15	GIS point width (default 15). This code indicates the width of the point used in the GIS map.	No
GISSBCTL	ON	Determines if the following temporary layers should be cleared when Select By map tool is used: address labels, sketches, nearest addresses, and measurements. Note: Highlights and selections temporary layers will always be cleared. <code>ON</code> will clear temporary layers. <code>OFF</code> will not clear temporary layers.	No
GISSBLR	OFF	Determines layers in which features will be selected when the Select By map tool is used. <code>ON</code> will only select features in the buffer layers chosen in the Search window. <code>OFF</code> will select features in all visible layers.	No
GISSERV	WATER_AXL1	This code indicates the name of the primary Image Service setup on the ArcIMS server.	No
GISSFCLR	248,138,29	This code indicates the selected feature highlight color (default 248, 138, 29).	No
GISSTCOL		This code indicates the name of the Street Column in Attributes of the Address Layer that is used for non-geocoded address searches.	No

Code	Example	Description	Fixed
GISSVAXL		GIS map file for service identified by GIS-SERV. Used for viewing nearest address, e.g., reverse geocoding. Note: GISSVAXL supports HTTP, fully qualified file paths, and UNC file paths. The system requires this to load the XML of the AXL and retrieve the geocoding definitions. Such information is not available via ArcXML responses.	No
GISTFNTC	0,0,0	Specify the RGB font color of the text marker label. Default values are 0, 0, 0.	No
GISTFNFS	BOLD	This code indicates the font style of the text marker. Valid values are BOLD, BOLDITALIC, ITALIC, REGULAR, OUTLINE, or UNDERLINE.	No
GISTFNTZ	10	This code indicates the font size of the text marker label. The default value is 10.	No
GISTFONT	Arial	This code indicates the font of the text marker label. The default value is Arial.	No
GISTGCLR	255,255,125	This code indicates the RGB color with which to highlight the text marker label. Default values are 255, 255, 125.	No
GISTLPCL	0,0,0	This code indicates the RGB point color of the text label. Default values are 0, 0, 0.	No
GISTLPTP	CIRCLE	This code indicates the point type of the text label. Valid values are CIRCLE (default), STAR, CROSS, SQUARE, TRIANGLE, or RASTERMARKER. Note: For more information about the RASTERMARKER value, see "Customizing map symbols" on page 175 .	No
GISTLPWD	15	This code indicates the width of the point used in the text label.	No
GISTOCLR	255,255,0	This code indicates the RGB color with which to outline the text marker label. Default values are 255, 255, 0.	No
GISTPRMD	ALLUPPER	This code indicates the print mode for the text marker. Valid values are ALLUPPER, ALLLOWER, NONE, or TITLECAPS.	No

Code	Example	Description	Fixed
GISZOFCT	2	This code indicates the default percentage factor by which the map search result will be enlarged. The default value is 2.	No
URLGIS	http://shotgundemo.inforE-AM.net/ attachments/gis-wo/default/	GIS map PDF directory. This value is used when displaying and printing map attachments of the work order.	No

Materials parameters

Materials parameters are related to assets, inventory, and pricing features that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly.

Set values for materials parameters according to the following table.

For more information on setting parameter values, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
ASSETASS	P	This code indicates whether to associate an asset with parts tracked by asset during receipts (R) or during creation of a purchase order (P).	No
AUTOPART	AUTO	<p>This code determines whether the system automatically updates the Parts Associated list.</p> <p>Update the Parts Associated list for approved lines on a receipt. If AUTOPART is set to AUTO, the system verifies whether the received part is associated with an equipment's Parts Associated list when a purchase order receipt is approved for a work order. If the received part is not associated with the equipment's Parts Associated list, the system adds the part to the list using the quantity of the transaction as the Parts Associated quantity.</p> <p>If the part is already associated on the Parts Associated list, then the system updates the quantity of the part on the Parts Associated list to the transaction quantity if the transaction quantity is greater than the existing quantity on the Parts Associated list. If the transaction quantity is not greater, then the system does not make any updates. Also applies to issues, not just receipts.</p>	No
AUTOP-NUM	NO	This code indicates whether Infor EAM automatically generates part numbers.	No
AUTOSTOK	Yes	This code indicates whether Infor EAM automatically creates records in tables R5STOCK and R5INSTOCK (+) for data collection.	No
DEFSTOCK	YES	This code indicates whether the stock management fields (e.g., re-order level, min/max, order level, etc.) should be copied from the	No

Code	Example	Description	Fixed
		highest-level parent store to the child store when a stock record is created in the child store.	
DEFRQTP	PS	Determines the default line type for requisitions. Specify a user status equivalent to the system status of PS (Stock Parts), PD (Direct Purchase), or RE (External Repair) for the PLTP entity. The system automatically defaults the line type to the specified user status. If DEFRQTP is null or if you enter an invalid value, the system automatically defaults the line type of requisitions to the system status of PS .	No
DEFUOM	EA	Base unit of measure for transactions, such as store issues and returns. Changing this default will not affect existing data. However, Infor strongly recommends using EA (Each) or PEC (Piece, e.g., individual part) as the base unit of measure because of the part-by-asset mechanism.	No
DELTMATL	Y	Delete materials list. Valid values are Y and N . Y implies that Infor EAM will remove the temporary material lists upon completion of the related work order. Y also indicates that after completion, the estimated material costs will no longer include data from the temporary material lists. N implies that Infor EAM will not remove the temporary material lists.	No
LOTNRG	P	Lot number generation. This code indicates how Infor EAM should generate lot numbers. Valid values are T (each receipt), P (only parts that are tracked by lot), or - (no lot numbers; lot number * is always used). It is possible to change this parameter in a live installation; however, Infor strongly recommends determining a lot-numbering policy before entering data. Changing the value does not affect existing data.	No
OBSTCASC	A	This code indicates whether parent equipment status changes of I (Installed) or D (Withdrawn) will be cascaded to the child equipment. If set to A the system will cascade parent equipment status changes to all children. If set to D the system will only cascade parent equipment status changes to dependent children.	No
OVER-RECV	YES	Indicates whether you can receive more parts than the number of parts originally ordered. If set to YES , you can receive more parts than the number ordered. If set to NO , you cannot receive more parts than the number originally ordered.	No
DRCPTTO	STORE	This code indicates whether Infor EAM receives direct on-dock materials directly to stores or against a work order.	No
PICKONCE	YES	This code indicates whether Infor EAM can issue multiple work orders against the same pick list. For example, if this parameter is set to YES and you have a pick list associated with a work order and the pick list includes four items	No

Code	Example	Description	Fixed
		for which you only issue one item for the pick list, you can no longer issue items against that pick list again. If the parameter is set to NO , you can still issue against the remaining three items on the pick list.	
PLNDRQPO	OFF	<p>This code indicates whether requisitions and unapproved purchase order totals are included in cost summaries for project reports. If the value is ON, then Infor EAM includes the cost of requisitions or unapproved purchase orders in the calculation of the total displayed in Planned throughout Infor EAM, as well as estimated work order costs that are not yet linked to a requisition or purchase order.</p> <p>If the value is OFF, Infor EAM does not include the cost of requisitions or unapproved purchase orders in the calculation of the total displayed in Planned throughout Infor EAM. The value for Planned is calculated based only on estimated work order costs.</p> <p>Purchase orders with Approved status are displayed in On Order throughout Infor EAM until they are Received. However, after purchase orders are received, the purchase order costs are displayed as Actual and used in the calculation of Estimate to Complete.</p> <p>Infor EAM calculates Estimate to Complete for project costs based on the following formula:</p> <p>Current Estimate to Complete – (Planned + Actual)</p>	No
POSTALLR	A	<p>Auto status for the DOST entity for full PO receipts. Specify a user status equivalent to the system status A (Approved) for the DOST entity, and the system automatically changes the purchase order status to the specified value when all the lines on the purchase order are fully received or cancelled.</p> <p>If the purchase order header status is already set to the status defined in this parameter, then the system does not modify the purchase order status.</p> <p>Note: If you have set the POSTALLR parameter, then the processing rules associated with the POSTALLR parameter overrides the rules for the POSTRECV parameter.</p>	No
POSTRECV	A	<p>Auto status for the DOST entity for PO receipts. Specify a user status equivalent to the system status A (Approved) for the DOST entity, and the system automatically changes the purchase order status to the specified value when one or more lines on the purchase order are partially received.</p> <p>When a RECV transaction is approved for a part associated to a purchase order, the system updates the purchase order header status to the specified status.</p> <p>If the purchase order header status is already set to the status defined in this parameter, then the system does not modify the purchase order status.</p>	No

Code	Example	Description	Fixed
		Note: If you have set the <code>POSTALLR</code> parameter, then the processing rules associated with the <code>POSTALLR</code> parameter override the rules for the <code>POSTRECV</code> parameter.	
PRICELEV	P	Price level. This code indicates whether prices must be kept at part level (same part prices for all stores) or at store level (part can have different prices in different stores). Valid values are <code>P</code> and <code>S</code> . You cannot change this setting once in use.	Yes
PRICETIM	R	<p>Pricing updates. This code determines when Infor EAM updates average unit price and last purchase price. Valid values are <code>I</code> (calculate new price at invoice approval) or <code>R</code> (calculate new price at receiving approval on basis of PO prices.) Inconsistencies in data will occur if you change this value. After a change, some prices will still be based on the old mechanism while others will be based on the new mechanism. Over time (usually the amount of time required for a complete inventory turnover), a shift will take place from the old mechanism to the new.</p> <p>If the price type of a stock record in the <code>R5STOCK</code> table is LIFO or FIFO, Infor EAM calculates pricing updates when you approve a receipt regardless of the setting of this parameter. However, if the setting of this parameter is <code>I</code>, Infor EAM calculates pricing updates again when you approve an invoice and/or credit/debit note.</p> <p>Infor strongly discourages changing this setting.</p>	No
PRICETYP	A	<p>Price type. This code determines the default value for Price Type when creating stores and indicates the manner in which Infor EAM prices storeroom materials at the store level. Valid values are <code>A</code> for Average price, <code>FIFO</code> for First in first out, <code>L</code> for Last price, <code>LIFO</code> for Last in first out, and <code>S</code> for Standard price.</p> <p><code>LIFO</code> or <code>FIFO</code> pricing is a time-based pricing method; therefore, you should only set <code>PRICETYP</code> to <code>FIFO</code> or <code>LIFO</code> on the store record if you have selected to keep prices at store level. (See <code>PRICELEV</code> earlier in this section.)</p> <p>Infor EAM strongly discourages changing the price type because inconsistencies in data may occur. (See <code>PRICETIM</code> earlier in this section.)</p>	No
PROJTRCK	ON	Budget tracking for projects. This code indicates whether Cost Area , Cost Center , and Code of Accounts are displayed and enabled on the Budgets tab of the Project form. Cost Area , Cost Center , and Code of Accounts enable you to track project costs and budgets more precisely by associating cost areas, cost centers, and codes of accounts with budget codes, as well as enabling project and financial managers to access more detailed information about project budgets on project reports.	No

Installation parameters

Code	Example	Description	Fixed
		Cost Area , Cost Center , and Code of Accounts are linked to the PRCA (Cost areas), PRCC (Cost codes), and PCOA (Code of accounts) entities. You can define cost areas, cost codes, and codes of accounts as user codes as necessary based on your project budget tracking preferences on the System Codes form. See "Defining system codes" on page 16.	
RECVAUTO	YES	This code indicates whether the system should automatically populate the quantity to receive on purchase order receipts. If RECVAUTO is set to YES , the system automatically populates the Receipt Qty. (UOM) on the Active Lines page of the PO Receipts form with the outstanding quantity for each line on a purchase order receipt. If RECVAUTO is set to NO , a value must be manually entered for the receipt quantity for each line on the receipt.	No
REQDESC	Requisition	Default requisition description. Changing this value does not affect existing data.	No
RPPRCAL	NO	This code indicates whether price calculations should be performed when receiving internally repaired spare parts.	No
RQSTALLR	A	Auto-status for the RQST entity for full PO receipts. Specify a user status equivalent to the system status A (Approved), and the system automatically changes the requisition status to the specified value when all lines are fully received or cancelled for a PO receipt. When a RECV transaction is approved for a part associated to a purchase requisition via a purchase order (the system does not consider receipts for store to store requisitions) and all of the requisition lines on the requisition are fully received or cancelled, then the system updates the requisition header status to the specified status. If the requisition header status is already set to the value defined by this parameter, then the system does not modify the status. Likewise, if all the lines on a requisition are cancelled and none of the lines have been received, then the system does not consider the setting of this parameter.	No
RQSTRECV	A	Auto-status for the RQST entity for PO receipts. Specify a user status equivalent to the system status A (Approved), and the system automatically changes the requisition status to the specified value when one or more lines are partially received for a PO receipt. When a RECV transaction is approved for a part associated to a purchase requisition via a purchase order (the system does not consider receipts for store to store requisitions), then the system updates the requisition header status to the specified status. If the requisition header status is already set to the value defined by this parameter, then the system does not modify the status. Likewise, if all the lines on a requisition are cancelled and none of	No

Code	Example	Description	Fixed
		the lines have been received, then the system does not consider the setting of this parameter.	
RRISSWAR	YES	This code indicates whether Infor EAM should generate a warning message to check whether you need to create a work order for a spare that has failed when you issue a repairable spare part on the Issue/Return Parts issues form.	No
RTNANY	Yes	<p>The <code>RTNANY</code> parameter indicates whether you can return a greater quantity of a part than the original issue quantity of the part, and/or whether or not the system allows you to return a part to a different store than the store from which it was issued.</p> <p>If <code>RTNANY</code> is set to <code>YES</code>, you return any quantity of any parts to any store for which there is a part record on the Stores tab of the Parts form (the system only requires that a part record exists for the part in the store, not that a bin-stock record exists for the part in the store).</p> <p>If <code>RTNANY</code> is set to <code>NO</code>, you cannot return a greater quantity of a part than the original issue quantity. The system only allows you to return the quantity of the part that was originally issued to that entity to the same store, bin, and lot.</p> <p>When issuing a part, you issue to an entity (work order, equipment, etc.) from a store. When returning a part, you return from an entity (work order, equipment, etc.) to a store.</p> <p>For example, if <code>RTNANY</code> is set to <code>NO</code> and if you issue 20 parts to a work order for a piece of equipment on the work order, you can only return those parts from the work order. You cannot return the part directly from the equipment. The <code>RTNANY</code> parameter indicates whether you can return a greater quantity of a part than the original issue quantity of the part.</p> <p>If <code>RTNANY</code> is set to <code>YES</code>, you can return a greater quantity of a part than the original issue quantity. If <code>RTNANY</code> is set to <code>NO</code>, you cannot return a greater quantity of a part than the original issue quantity.</p>	No
SHOWQTY	NO	This code indicates whether to show the expected quantity for Infor EAM Mobile physical inventory.	No
STTKDISC	2	<p>Physical inventory discrepancies. This code indicates how Infor EAM handles physical inventory discrepancies for parts tracked by asset when signing off physical inventories on the Physical Inventory form. Valid values are 1, 2, or 3, with 2 being the default value. You can change this value.</p> <p>If the value is 1, Infor EAM ignores physical inventory discrepancies for parts tracked by asset. If the value is 2, Infor EAM ignores physical inventory discrepancies for parts tracked by asset, but prints the discrepancies on the sign-off document. If the value is 3, Infor EAM disables signing off stocktakes for parts tracked by asset.</p>	No

Miscellaneous parameters

Miscellaneous parameters affect settings that are not specific to any module.

Set values for miscellaneous parameters according to the following table.

For more information on setting parameter values, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
~ADRV~	RUNNING 10 JUNE 2004 14:12	Object audit control row	No
~BDRV0~	RUNNING 10 JUNE 2004 14:12	Batch interface error driver	No
~BDRV1~	RUNNING 10 JUNE 2004 14:12	Batch interface driver 1	No
~KDRV~	RUNNING 10 JUNE 2004 14:12	KPI scores	No
~MDRV~	RUNNING 10 JUNE 2004 14:12	Mail data driver	No
~TDRV0~	RUNNING 10 JUNE 2004 14:12	Tracking data error driver	No
~TDRV1~	RUNNING 10 JUNE 2004 14:12	Tracking data driver 1	No

Purchasing parameters

Purchasing parameters are related to purchasing and requisitions that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly.

Set values for purchasing parameters according to the following table.

For more information on setting parameter values, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
DEFPOTP	PS	Determines the default line type for purchase orders. Specify a user status equivalent to the system status of PS (Stock Parts) or PD (Direct Purchase) for the PLTP entity. The system automatically defaults the line type of purchase orders to the specified user status. If DEFPOTP is null or if you enter an invalid value, the system automatically defaults the line type of purchase orders to the system status of PS .	No
EXRTUPDT	NO	Manual exchange rate update. Setting this parameter to YES will enable users to manually enter exchange rate fields.	No
EXTCHG	M	Include adjusted charges in the base price. This code indicates whether Infor EAM automatically includes adjusted charges, such as a discount or an additional charge, when entering information on the Extra	No

Code	Example	Description	Fixed
		<p>charges/Discounts dialog box. If the value is Y, Infor EAM automatically selects Include for all the items on the Extra charges/Discounts dialog box and does not allow you to unselect it. If the value is N, Infor EAM automatically unselects Include for all the items on the Extra charges/Discounts dialog box and does not allow you to select it. If the value is M, Infor EAM automatically unselects Include for all the items on the Extra charges/Discounts dialog box and enables you to select or unselect it as necessary.</p>	
INCREDIT	O	<p>Updates part price for stock for credit and debit notes. This code indicates how Infor EAM handles updating part prices for approved credit and debit notes. Valid values are O (Off), P (Partial), or F (Full), with O being the default value. You can change this value.</p> <p>If the Value is O, Infor EAM does not update part prices upon approval of a credit or debit note.</p> <p>If the Value is P, Infor EAM applies the credit amount in the calculation of Average Price for a part upon approval of a credit note. When the credit amount is greater than the value of the part in stock, Infor EAM applies a portion of the value of the credit amount, up to the value of the part in stock, in the calculation of the average price. By setting the value to P, the calculation of the average price might result in an average price of 0 for a part, but it also ensures that the average price cannot be less than 0. The remaining value of the credit amount that is not used in the calculation of the average price is stored as a Credit Balance for the part in stock.</p> <p>If you are using LIFO/FIFO as your pricing method, Infor EAM applies credit amounts similarly to the manner it does if the setting is P regardless of the setting you specify for this parameter; however, Infor EAM stores the unused credit amount in the <code>IVL_LOSTCREDIT</code> column of the <code>R5INVOICELINES</code> table, rather than storing the credit amount as a Credit Balance for the part in stock.</p> <p>If the value is F, Infor EAM applies the credit amount in the calculation of Average Price for a part upon approval of a credit note when the credit amount is less than the value of the part in stock. Setting the value to F ensures that the calculation of the average price for a part can never result in a value of 0.</p>	Yes
INVADAYS	60	<p>This code indicates the number of days after completion that invoice allocations can be applied to a work order.</p>	No

Installation parameters

Code	Example	Description	Fixed
INVALLOC	NO	Set <code>INVALLOC</code> to <code>YES</code> to track unallocated invoice differences. Set <code>INVALLOC</code> to <code>NO</code> to apply all invoice differences to the stock record.	No
INVDESC	Invoice	Invoice description. Changing the value does not affect existing data.	No
INVMETH	-	This code indicates the default inventory replenishment method to use for maintaining stock levels. Valid values are (M) for Min/Max, (-) for Reorder level, or (+) for On demand. The default setting for this parameter is Reorder level.	No
INVUPCAT	NO	This code indicates whether the supplier's catalog will be updated upon approval of an invoice.	No
LIMITLEV	L	Limit level. This code indicates if Infor EAM should check the value for orders/requisitions on the header level (H) or line level (L). Changing the value does not affect existing data.	No
MATCHAPP	NO	Automatic approval of matched invoices. This code indicates whether Infor EAM automatically approves invoices for which the cost of all invoice lines has been matched with the cost of the purchase order lines associated with the invoice lines within range of tolerance specified for Match Tolerance Absolute or Match Tolerance % on the Organization form. If the value is set to <code>YES</code> Infor EAM automatically assigns <code>A</code> , Approved status for invoices for which all invoice lines have been matched with associated purchase order lines within the specified range of tolerance. If the value is <code>NO</code> , then all invoices must be manually approved.	No
MATCHTOL	0	Match tolerance. This code indicates the tolerated difference (in percentage) between the sum of the invoice lines and the amount specified on the invoice header. Valid values are any non-negative numbers. Changing the value does not affect existing data. Note: The <code>MATCHTOL</code> installation parameter is no longer active for Infor EAM (Oracle Forms) or Infor EAM, because users no longer enter a voucher total. Instead, the voucher total is now calculated based on the total invoice costs.	No
POCURRE	YES	This code indicates whether Infor EAM allows multi-currency order lines.	No
PORDDESC	Order	Purchase order description. Changing the value does not affect existing data.	No

Code	Example	Description	Fixed
RCPTCURR	PO	This code indicates which exchange rate Infor EAM uses for receipt or return of goods. PO= exchange rate of purchase order; RCPT= the active exchange at time of receipt/return transaction approval.	No

URL parameters

URL parameters designate locations and directories for schemas, servlets, documents, etc. that must be set for many Infor EAM (Oracle Forms) and Infor EAM add-ons and features to work properly.

Set values for URL parameters according to the following table.

For more information on setting parameter values, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
ADR-DOCUP	http://	Document upload path for Infor EAM Advanced Reporting. The value specified identifies the path from the advanced report server to the document upload directory. Must be a valid URL and can be either <code>http://</code> or <code>file://</code> protocol. The path is necessary to add attachments of type "U" (upload) to the Work Order and Purchase Order reports.	No
DISCSCH	myoracleuser/ mypassword@ my-database	The schema connect string for Discoverer	No
DISCVURL	http://myserver.mycompany.com/discoverer/viewer	The URL of the Discoverer viewer	No
ONLMAN	http://myserver.mycompany.com	Contains the full path to the online help	No
OPIMGURL		This install parameter is the absolute URL of the directory where the OPS setup stores the images.	No
RPT-DOCUP	http://mycompany.myserver.com/documents/PDFS	Document upload path for Crystal Clear Reporting. The value specified identifies the path from the Crystal Clear Report Server to the document upload directory. Must be a valid URL and can be either an <code>http://</code> or <code>file://</code> protocol.	No

Code	Example	Description	Fixed
SMTPSEND	mailid@yourcompany.com	Name of the mail sender, which is used in replying to messages	No
SMTPSERV	mail.yourcompany.com	SMTP mail server	No
WD-CUPURL	http://myserver.mycompany.com/servlet/WscanUpload	The URL of the web data collection upload file servlet.	No

Work parameters

Work parameters are related to work orders, budgets, and project management features that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly.

Set values for work parameters according to the following table.

For more information on setting parameter values, see "Defining installation parameters" on page 15.

Code	Example	Description	Fixed
7ISCDKEY		Infor EAM Caller Login for Service Requests CD key	No
AUTODMEC	Y	This code determines whether the Remove Equipment hyperlink on the Equipment page of the Work Orders form breaks the association between the parent work order and a multiple equipment child work order or whether the system also deletes the multiple equipment child work order. Valid values are Y or N . By default the parameter is set to Y, which means that the system deletes the related multiple equipment child records.	
AUTOPMCL	NO	This code indicates whether to automatically close all released minor PMs at release of the major PMs (YES/NO).	No
BOOKDATE	ON	Indicates whether to enforce date constraints when booking hours. If set to OFF, the system ignores the constraints. If set to ON, the system enforces the constraints. Note: Setting this parameter OFF may result in inconsistencies within your booked hours data. Setting BOOKDATE to OFF enables you to book labor hours for a date that is earlier than Date reported. By enabling you to book the hours without any date restrictions based on the Date reported field, you can leave the value for Date	No

Code	Example	Description	Fixed
		reported as is and still book hours for work that has already been completed.	
BOOPLAN	OFF	Booking hours. Valid values are ON and OFF. When booking hours, if the value is ON, Infor EAM gets the trade rate from the activity on which hours are booked. If the value is OFF, Infor EAM gets the rate from the employee table. Changing this value will not affect existing data. If you change this parameter and open work orders exist on which hours have already been booked, inconsistencies will arise. Close work orders before changing BOOPLAN.	No
CALSTD	YES	Determines if calibration standards that have overdue PM work orders can be used to perform a calibration. If CALSTD is set to YES, equipment with overdue PM work orders are available for selection as a calibration standard. If CALSTD is set to NO, equipment with overdue PM work orders are not available for selection as a calibration standard.	No
CASCLOC	NO	Cascade equipment Location changes to PM equipment records. If set to YES cascade changes. If set to NO, do not cascade changes.	No
COMDAYS	14	Number of days during which you can book hours on closed work orders. Infor recommends a minimum value of 1. Changing the value will not affect existing data.	No
COVDUPAC	*	This code indicates whether the system allows multiple active warranties. If set to Yes (+), more than one active warranty on a certain equipment can be specified. If set to No(-), only one active warranty on a certain equipment can be specified.	No
COVDURUP	+	This code indicates whether the duration fields are display-only. If set to Yes (+), the duration fields can be entered manually. If set to No (-), the duration fields are display-only.	No
DSCHAVAI	7	Number of days from current date used to calculate labor availability in daily scheduling	No
DUPCHECK	ON	If code is set to ON, Infor EAM checks for duplicate and repeated service requests.	No
EVTCASCD	N	Event cascade. This code indicates whether changing a parent work order's status to Closed	No

Installation parameters

Code	Example	Description	Fixed
		or Cancelled causes the status of child work orders to also change.	
INRVCTRL	NO	This code indicates whether Revision control is activated for inspections.	No
INSWOST	L	This code identifies the status used to create work orders from inspection forms. You can choose user codes equivalent to type R (Released).	No
ISSDAYS	0	Issue days. This code indicates the number of days for which issues can be made after you close a work order. Valid values are any non-negative numbers. Changing the value will not affect existing data.	No
JTAUTH	NO	This code indicates whether work order type authorization is activated. Work order type authorization limits which users can update, insert, or delete work orders based on the type of work order.	No
NPRDAYS	14	Nonproductive days. This code indicates the number of days for which you can book past nonproductive hours, which is labor performed without a work order. Note that this parameter may interfere with closed periods data. Changing the value will not affect existing data.	No
PLANLEV	JOB	This code determines the level at which planning will be performed. If JOB is selected then planning can only be done at the job level. If TASK is selected then planning can only be done at the task level. If EITHER then planning can be done on either tasks or jobs.	EITHER
PMNEST	YES	<p>Indicates whether to enable the following PM nesting enhancements. Valid values are YES or NO.</p> <p>If YES is selected:</p> <p>The system adjusts the due date forward for nested, more frequent work orders with a status of Awaiting release or Bypassed whenever a work order is Completed.</p> <p>The system adjusts the due date forward for more frequent PM work orders when attempting to release the work order if it is nested with a Completed less frequent work order.</p> <p>If NO is selected:</p> <p>The system adjusts the due date forward for nested, more frequent work orders with a status of Bypassed whenever a work order is completed.</p>	No

Code	Example	Description	Fixed
		The system changes the status of more frequent PM work orders to Released when attempting to release the work order and it is nested with a Completed less frequent work order.	
PMCRPAST		This code indicates whether Infor EAM can generate new fixed PM work orders with a due date in the past. Valid values are YES and NO. The default setting is NO. If the value is set to YES, Infor EAM creates the next PM work order with a due date that reflects the calculated work order due date and the PM frequency, even if the next due date is in the past. If the value is NO, Infor EAM always creates the PM work order with a future due date.	No
PMRVCAPP	NO	PM Revision Control. This code indicates whether you can create a new revision only from an approved revision.	No
PMRVCDEP	NO	PM Revision Control. This code indicates whether components of a PM depend on the PM itself.	No
PMRVCRES	YES	PM Revision Control. This code indicates whether users can approve lines only from their own departments.	No
PMRVCTRL	NO	PM Revision Control. This code indicates whether PM Revision Control is activated.	No
PMWODATE	C	This code indicates the starting date used when calculating the next due date of a variable PM work order. Set to C for completion date, PB for calibration Performed By date, or RB for calibration Reviewed By date.	No
PPMSTAT	A	PM Status. This code indicates the status of a PM work order when generated from a PM schedule. Valid values are A for Awaiting Release and R for Released. Changing the value will not affect existing data.	No
PROJWOST	L	This code identifies the status used to create work orders on the Project form.	No
REOPENPM	NO	Reopen PMs. This code indicates whether a PM work order can be reopened.	No
REQDAYS	-999	Number of days after completing a work order that a requisition can be created against it.	No
RSPCOMP	NO	Indicates whether to display the Qty. Completed on work orders for internally repaired repairable spare parts. If set to NO, the system does not	No

Installation parameters

Code	Example	Description	Fixed
		display Qty. Completed. If set to YES, the system displays Qty. Completed and restricts internal repair receipts to completed repairs.	
RTNDAYS	14	Return days. This code indicates the number of days that parts can be returned to the store after the work order has been closed. Valid values are any non-negative numbers. Note that this parameter may interfere with closed periods data. Changing the value will not affect existing data.	No
SCHPAST	NO	Set to SCHPAST is set to YES to allow scheduling in the past. Set SCHPAST to NO to prevent scheduling in the past.	No
SCHSTAT		The user status of a work order after you have scheduled an activity. You can select any status.	No
SHOWJOB	YES	This code determines whether job plan information is visible in the product. If YES then the Job Plan screen, tabs, and fields will be visible in the product. If NO then this information will not be visible. The default value is NO.	No
SRCLOSE	NO	This code indicates whether to automatically close an associated service request when a work order is closed. Valid values are YES and NO.	No
TOOLDAYS	3	This code identifies the number of days to update tool usage costs after completion of a work order.	No
UPWOMATL	N	Determines if the work order planned parts list is updated to include direct requisition and PO line parts if they are not already planned. If 'N', the work order planned parts list is not updated. If 'Y', the work order planned parts list will be updated. If 'P', choose if the work order planned parts list gets updated as lines you add to requisitions and POs.	No
VTTAUTH	OFF	Determines whether the system uses vehicle ticket type authorization. Valid values are ON and OFF.	No
WFFTAUTH	YES	Comments code. Infor EAM uses this code to determine who has authority to change comments in the Comments grid for work orders on the (WXDONE) form. If the installation parameter is set to NO, all users can change comments; if the installation parameter is set to YES, only users who can reopen work orders have permission to change comments.	No

Code	Example	Description	Fixed
WOCLPOUT	NO	<p>This code indicates whether a work order can be closed if purchase requisitions and purchase orders are still outstanding. If set to YES, work orders with outstanding requisitions and purchase orders may be closed.</p> <p>Note: This parameter may affect purchase order generation if you allow work orders to be closed for which there are existing open requisitions.</p>	No
WOQUAL	ON	<p>Qualification enforcement for work. Valid values are ON and OFF. When scheduling work, if the value is ON, Infor EAM determines whether an employee is eligible to perform work by comparing the qualifications associated with a work order activity with the qualifications associated with employees on the Employees form. Infor EAM enables you to assign any employee with the necessary qualifications/training to perform the work.</p> <p>When scheduling work, if the value is OFF, Infor EAM does not check qualifications for work scheduling, and any authorized users can perform work regardless of any qualifications associated with work order activities.</p>	No
WORKDAY	8	<p>Work day hours. This code indicates the default number of hours in a working day. Infor EAM uses this value on the Activities tab of the Work Orders form to calculate the required number of people when an estimated number of hours and the duration is specified. Changing the value will not affect existing data.</p>	No
WORKWOST	L	<p>This code identifies the user status for work orders when updated by the Generate/Release WOs form. The work order must have the system status R.</p>	No

Organization options



The tables in this appendix display a list of the organization options for Infor EAM multi-organization security (MOS). The tables are organized by corresponding modules for the organization options.

For more information on multi-organization security (MOS) and adding options for organizations, see "Implementing multi-organization security (MOS)" on page 77.

Base options

See the following table for Base options:

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
DOCUMKEY	Value for the Documoto Tenant Encrypted Key (tek).	Free Text	Base	'		
DOCUMURL	URL for the Documoto Server.	Free Text	Base	'		
DOCUMUSR	Value for the Documoto user name.	Free Text	Base	'		

Call Center options

See the following table for Call Center module options:

Organization options

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
CASECASC	Cascades the scheduled dates for case tasks automatically based on the previous tasks and tasks duration.	Code	Call Center	'1'	NO, SCHED BOTH	NO
SREQDSP	Determines which equipment displays. If set to ALL , all equipment is displayed. If set to ASSOCIATED , only equipment associated to the contact is displayed.	Code	Call Center	'1'	ALL, ASSOCIATED	ALL

Equipment options

See the following table for Asset Management module options:

Code	Description	Validation Type	Fixed	Valid Values	Default Value
AINVAPP	Determines resolution of the asset when the asset inventory session is approved, and the Observed Physical/Bin Location is NULL. If FOUND, then system sets the Resolution of the asset to "Asset Found". If NOTFOUND, system sets the resolution of the asset to "Asset Not Found". If BLOCK, the system does not allow approving the session if any unresolved assets exist.	Code	'1'	FOUND, NOT-FOUND, BLOCK	FOUND
GENEQMAX	Determines the threshold at which the equipment generation process starts in asynchronous (background) mode. If Generate Count is higher than this setting, the process runs asynchronous and the process is queued. Otherwise the process runs synchronous and the user must wait for the process to finish.	Integer	'1'	1, 999999	100
GENEQWRN	Prevents the start of the equipment generation process when warnings still exist. If set to YES the system	Code	'1'	YES, NO	NO

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	asks the user to start the generation process and ignore the warnings. If set to NO, the system does not allow the user to start the generation process.				
GENEQPMR	Prevents the equipment generation process from creating PM work orders if PM revision control is active. If set to YES, the system generates PM work orders without asking for approval. If set to NO, the system will not generate PM work orders. If set to WARNING, the system raises a warning message during the Preview generation.	Code	'1'	YES, NO, WARNING	NO
SRSTSYNC	Determines if the system should maintain a structure record between the header equipment and the segment or the route, if a record is inserted or deleted on the Segments or Routes tab of the equipment screens. If set to I, a structure record will be created at insert. If set to D, the structure record will be removed at delete. If set to ID, the structure is maintained both at insert and delete. If set to OFF, the system will do nothing.	Code	'4'	OFF, I, D, ID	OFF
WSSELECT	Determines the default value of the Include in Move check box on the Associations tab of the Workspace Moves screen. Set to YES to default the selection of the check box. Set to NO to unselect the check box by default.	Code	'1'	NO YES,	YES

Materials options

See the following table for Materials module options:

Organization options

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
ISSTOEMP	Allows the issuing of parts to employee. If the value is NO, parts may not be issued to Employees. If the value is YES, all parts may be issued to employees. If the value is KITS ONLY, only parts tracked as kits may be issued to employees.	Code	Materials	'1'	YES, NO, KITS ONLY	NO
KITLDESC	Provide a default value for Kit Lot Description on Build Kit screen.	Free Text	Materials	'1'		
KITPPULD	IF YES, default Part Pulled checkbox to selected on the Build Kit screen. If NO, default the Part Pulled checkbox to unselected.	Code	Materials	'1'	YES, NO	NO
LOTIEXPL	If NO, the system will not permit issuing a part that has expired (Lot Expiration Date). If YES, the system will allow issuing a part that has expired.	Code	Materials	'1'	YES, NO	YES

Purchasing options

See the following table for Purchasing Management module options:

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
IVBYPASS	If set to YES, the system bypasses system rules for validation and processing of invoices from external systems. This option is valid for ION integrations.	Code	Purchasing	'1'	YES, NO	NO
POREVRSN	If YES, Revision Reason is required when creating a new revision of a PO.	Code	Purchasing	'1'	YES, NO	NO

Work options

See the following table for Work Management module options:

Code	Description	Validation Type	Fixed	Valid Values	Default Value
ACTCALL	Specifies the status to automatically assign to the work order after the assignment status of the last activity is Completed, and all other activities are Completed. If left blank, or if the value entered is not a valid value for the system code R (Released), the work order status will not change.	Free Text	'1'		
ACTINFO	Determines what is displayed inside the Activity dropdowns. Set to TRADE to display the description of the trade associated to the activity. Set to NOTE to display the note associated to the activity.	Code	'1'	TRADE, NOTE	TRADE
ACTNOTE	Determines whether or not the system copies the task plan description to the activity note fields. Set to YES to copy the task plan description, and set to NO to prevent the copy.	Code	'1'	YES, NO	NO
ACTSUPP	Selects the preferred supplier of a task plan or job plan on the work order activity, on the job, or on the plan labor record if Hired Labor is selected. If set to YES, the supplier is populated if still blank and a preferred supplier was found. If set to NO, the supplier remains blank and must be manually selected.	Code	'1'	YES, NO	NO
BKPLAULTO	When using Retrieve PO Service Lines on the Book PO Labor screen, Hours Worked is automatically populated for Hours for Service (ST) and Contractor Hire (SH) is automatically populated with the labor hours remaining to be booked for the selected line.	Code	'1'	YES, NO	NO
CCDUPLCI	Determines whether during approval of a customer contract, the system checks if equipment, projects, or work orders are already used on another active contract with overlapping periods. If ON, the system does not allow the use of the same equipment or projects more than once. If set to OFF, the system does not perform this check. If set to WARNING, the system asks the user what to do. If set to WARNING-CC, the system also considers the	Code	'1'	ON, OFF, WARNING, WARNING-CC	ON

Organization options

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	charge categories on the other contract and only asks the user if those overlap as well.				
CCFIDAYS	Number of days after which no customer invoices will be generated. For Customer Contracts this is after the End Date. For Rentals after the Completed Date. The system will change the Status of the contract or the rental to Finished for this purpose.	Integer	'1'	0, 999999	90
CCGEN-MAX	Establishes the threshold at which the customer invoice regeneration process starts in asynchronous (background) mode. If the number of contract items multiplied with the number of charge definitions associated to the contract is higher than this setting the process runs asynchronous and the process will be queued. Otherwise the process runs synchronous and the user must wait for the process to finish.	Integer	'1'	1, 999999	100
CHCKL-FUP	Determines if follow-up activities are automatically generated when signing Reviewed By.	Code	'1'	ON, OFF	OFF
CHCKL-REG	Controls how Regulatory checklist items, marked for Repairs can be completed. If set to N, a valid resolution (or) a combination of a valid resolution and follow-up activity is required. If set to P, a NULL resolution is allowed, along with a follow-up activity. If set to OFF, items can be completed without a resolution or follow-up activity.	Code	'1'	P, N, OFF	N
CHCKLSEQ	Determines if the checklist must be renumbered based on the route attached to the work order. If set to YES, the system renumbers the checklist items.	Code	'1'	YES, NO	NO
CLGROUP	If FULL, the system displays the full tree structure in the closing code lookup with all the levels in the hierarchy. If GROUP, system displays just one level of the hierarchy. If OFF, the closing code lookup operates with no group or hierarchy.	Code	'1'	FULL, GROUP, OFF	OFF
COPY-TOOL	Determines if standard work order tools and PM schedule tools are used to plan, schedule, or plan and schedule tools for work orders. Set to P to copy tool records only to the Plan Tools tab for work order. Set to S to copy tool records	Code	'1'	P, S, B	P

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	only to the Schedule Tools tab for work order. Set to B to create a tool schedule record for the planned hours for each day the activity runs.				
CPRC-CLOV	Determines which lookup will be used to categorize capital planning requests. If set to CPRQ, the system will use the default Capital Request Categorization Codes. If set to EMRS, the system will use EMRS codes instead.	Code	'1'	CPRQ, EMRS	CPRQ
FLUPF-PTP	Determines if the follow-up work order can have multiple activities with different From Points and To Points. If set to YES, the system allows it. If set to NO, the system does not allow it and one follow-up work order will be created for each activity with a unique From and To Point combination.	Code	'1'	YES, NO	NO
FLUP-TYPE	Determines the type of follow-up a checklist will generate. If set to DM, deferred maintenance activities will be created. If set to WO, a work order will be generated.	Code	'1'	DM, WO	WO
LOTOR-FRQ	Determines the frequency of lockout/tagout (LOTO) reviews, or number of days from the current date after which a LOTO review will be required. It is applied to the Date Review Required during the review of LOTO records.	Integer	'1'	1, 999999	365
LOTOR-REQ	Determines if a review of lockout/tagout (LOTO) records is required. If set to YES, the system requires approval by a reviewer for deletion of LOTO records. If set to NO, the records can be deleted without review.	Code	'1'	YES, NO	YES
LOTOR-REV	Determines if a new revision of isolation point requires review of lockout/tagout (LOTO) records. If set to YES, during the revision approval, the system resets the review data of the LOTO records that reference the isolation point for equipment and locations. If set to NO, the system does nothing.	Code	'1'	YES, NO	YES
LOTO-SYNC	Determines if new revision of isolation point updates lockout/tagout (LOTO) records. If set to YES, during revision approval, the system applies the new isolation point data to the LOTO records that reference the isolation point	Code	'1'	YES, NO	NO

Organization options

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	for equipment and locations. If set to NO, the system does nothing.				
MEROUT-WO	Determines which equipment to copy to route-based PM work orders. Select C for route equipment only, H for header equipment only, or B to have both header and route equipment copied.	Code	'1'	C, H, B	C
NON-CASKP	Determines the automatic update of the status of the associated nonconformities at the closing of work orders. If set to YES, set any unfinished reinspection (observation is 2 or higher) to skipped, if the record was not updated. If set to NO, the system will prevent the closing of the work order.	Code	'1'	YES, NO	NO
NON-CAAPP	Determines the automatic update of the status of the associated nonconformities at the closing of work orders. If set to YES, set any unfinished observation to approved, if the record was created for the work order or if it was updated. If set to NO, the system will prevent the closing of the work order.	Code	'1'	YES, NO	NO
OC-CLFLUP	Prevents the completion of operator checklists where checklist items exist that have follow-up selected, but for which no follow-up work orders has been created. If set to YES, the system prevents the completion of the operator checklist. If set to WARNING, the user receives a warning message but will be allowed to continue and complete the operator checklist. If set to NO the system will not perform the check.	Code	'1'	YES, NO, WARNING	NO
OCFUF-PTP	Determines if the follow-up work order can have multiple activities with different From Points and To Points. If set to YES, multiple points are allowed. If set to NO, multiple points are not allowed and one follow-up work order will be created for each activity with a unique From Point and To Point combination.	Code	'1'	YES, NO	NO
OCFU-TYPE	Determines the type of follow-up is generated from a checklist. If set to DM, deferred maintenance activities will be created. If set to WO, a follow-up work order will be created.	Code	'1'	DM, WO	WO

Code	Description	Validation Type	Fixed	Valid Values	Default Value
OPCKL-FUP	Determines if follow-up activities are automatically generated when signing Reviewed By.	Code	'1'	ON, OFF	OFF
OPCKL-REG	Controls how Regulatory checklist items, marked for Repairs can be completed. If set to N, a valid resolution (or) a combination of a valid resolution and follow-up activity is required. If set to P, a NULL resolution is allowed, along with a follow-up activity. If set to OFF, items can be completed without a resolution or follow-up activity.	Code	'1'	P, N, OFF	N
PERM-CLEA	Determines if the system cleans up permits after work order changes. If set to NO, the system does nothing. If set to DEACT, the system deactivates permits that are not referenced anymore. If set to DEL, the system deletes the permit references from the work order.	Code	'1'	DEACT, DEL, NO	DEACT
PER-MMAPD	Determines deactivation of mandatory permits. If set to YES, mandatory permits on the work order can be deactivated. If set to NO, deactivation is not allowed.	Code	'1'	YES, NO	NO
PERMR-FRQ	Determines frequency of permit reviews. Indicates the number of days from the current date after which a permit review will be required. It is applied to the Date Review Required during the review of permit records.	Integer	'1'	1, 999999	365
PERMR-REQ	Determines if permit review is required. If set to YES, deletion of permit requires approval by a reviewer. If set to NO, permit records can be deleted without review.	Code	'1'	YES, NO	YES
PERMR-REV	Determines if new revision of permit requires review of permit records. If set to YES, during revision approval the system resets the review data of the permit records that reference that permit for equipment, locations, categories, PM schedules, and standard work orders. If set to NO, the system does nothing.	Code	'1'	YES,NO	YES
PERMSYNC	Determines if new revisions of permits update permit records. If set to YES, at revision approval the system applies new permit data to the permit records that reference that permit for equipment, locations, categories, PM	Code	'1'	YES, NO	NO

Organization options

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	schedules, and standard work orders. If set to NO, the system does nothing.				
PTWAUTO	Determine the auto creation of permits to work (PTW). If set to YES, permit to work is automatically created for work orders that require them. If set to NO, the creation is a manual process.	Code	'1'	YES, NO	YES
PTWCON-FL	When entering a conflicting permit to work record, the system creates a second conflict record attached to the conflicting PTW referencing back to the PTW for which the conflict was created. This option controls how the second record is created. If set to MANUAL, the system creates this second conflict record but leaves the resolution blank and flags the conflicting PTW that un-assessed conflicts exist. If set to SYNC, the system sets the resolution based on the selection for the originating conflict and will not flag the conflicting PTW.	Code	'1'	MANUAL, SYNC	SYNC
PTWEX-PIR	Determines which permit to work automatically expires if Valid Until occurs in the past. If set to ACTIVE, only active permits expire. If set to ALL, any permit not closed or cancelled expires.	Code	'1'	ACTIVE, ALL	ACTIVE
PTWLIMIT	Limits the number of open permits to work per work order. If set to YES, only one open PTW is allowed at any one moment. If set to NO, there is no constraint on the number of open permits to work.	Code	'1'	YES, NO	YES
PTWMEC	Creates permits to work for multiple equipment child work orders. If set to YES, the permit to work is created for MEC work orders. If set to NO, the permit to work will still be created, but will be attached to the multiple equipment work order, i.e., the parent.	Code	'1'	YES, NO	NO
RDRVPM	Determines if PM work orders are included in the reliability calculations. If set to YES, PM work orders are included in the reliability calculations if the appropriate closing code is entered. If set to NO, PM work orders are excluded from the calculations.	Code	'1'	YES, NO	YES
ROUTEEOB	If Y, the system creates multiple equipment child (MEC) type work orders for each route	Code	'1'	Y, N	N

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	equipment when route based PM work orders are released. They will be related to the parent job.				
SAFER-FRQ	Determines frequency of safety reviews . Indicates the number of days from the current date after which a safety review will be required. It is applied to the Date Review Required during the review of safety records.	Integer	'1'	1, 999999	365
SAFER-REQ	Determines if safety review is required. If set to YES, deletion of safety records requires approval by a reviewer. If set to NO, safety records can be deleted without review.	Code	'1'	YES, NO	YES
SAFER-REV	Determines if new revision of hazard and precaution requires review of safety records. If set to YES at revision approval the system resets the review data of the safety records that reference the hazard or precaution for equipment, locations, categories, parts, PM schedules and standard work orders. If set to NO, the system does nothing.	Code	'1'	YES, NO	YES
SAFESYNC	Determines if a new revision of precautions updates safety records. If set to YES, at revision approval the system applies the new precaution data to the safety records that reference that precaution for equipment, locations, categories, parts, PM schedules, and standard work orders. If set to NO, the system does nothing.	Code	'1'	YES, NO	NO
TEMP-MATL	Determines if temporary material lists are displayed in material lists lookups. If set to YES, the material lists are displayed. If set to NO, the material lists are not displayed in lookups.	Code	'1'	YES, NO	YES
TRACELEV	Determines the level at which MEC work orders will be created after using the Trace Route feature. If set to ROUTE, the MEC work orders will be created for the selected routes. If set to SEGMENT, work orders will be created for the segments attached to the selected routes.	Code	'1'	ROUTE, SEGMENT	ROUTE
WOBKMIDN	Determines if booking hours across midnight is allowed. If set to YES, two booked labor records are created. If set to NO, an error	Code	'1'	YES, NO	NO

Organization options

Code	Description	Validation Type	Fixed	Valid Values	Default Value
	message displays stating booking hours across midnight is not allowed.				
WOCLFLUP	Prevents the closing of work orders for existing checklist items for which Follow-up is selected but for which no follow-up work order is created. If set to YES, the system prevents the closing of the work order. If set to WARNING, the system sends the user a warning message but the user will be allowed to continue and close the work order. If set to NO, the system does not perform the check.	Code	'1'	YES, NO, WARNING	NO
WOFU-TYPE	Determines what kind of follow-up a checklist will generate. If set to DM, deferred maintenance activities will be created. If set to WO, follow-up work orders will be created.	Code	'1'	DM, WO	WO
WOFUF-PTP	Determines if the follow-up work order can have multiple activities with different From Points and To Points. If set to YES, it is allowed. If set to NO, this is not allowed and one follow-up work order will be created for each activity with a unique From Point and To Point combination.	Code	'1'	YES, NO	NO
WOQC-STAT	Specify a work order user status with a system status of R or C. The system automatically set the New Status on the Work Order Quick Close screen to this value.	Free Text	'1'	R, C	C

Default screen locations



The tables in this appendix display a list of the default navigation paths for Infor EAM.

Note: The tables represent the default location of the screens as delivered with the Infor EAM product. Your system administrator may have modified the locations of screens. Please consult your system administrator if you cannot find a screen in the default navigation path.

Navigating default screen locations

Infor delivers all screens in default locations across the system. However your system administrators may change the default navigation path of screens for your organization. To find the default, out-of-the-box location of a screen in Infor EAM consult the tables below. The screens are organized by module in the tables.

Administration menu

This table shows the default navigation path for the Administration menu screens and the tab or pop-up name included on each screen:

Screen	Default navigation	Tab or pop-up name
Administration Setup	Administration > Administration Setup	Options
Advanced Reports Author	Administration > Advanced Reports Author	Special-Calls Cognos Author URL
Alert Management	Administration > System Configuration > Alert Management	List View Record View Before SQL After SQL Grid Parameters Work Order Alerts E-mail Alerts

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Exceptions History Comments Documents
Archive Records	Administration > Setup > Archive Records	List View Record View Work Purchasing Stock Transactions Call Center Audit Trail Electronic Records
Associate Custom Fields	Administration > Custom Fields > Associate Custom Fields	Not applicable (Stand-alone L/D)
Audit Setup	Administration > Security > Audit Setup	Tables Comments and Custom Fields
Chart Setup	Administration > Start Center Setup > Chart Setup	List View Record View User Groups
Classes	Administration > Setup > Classes	Record View Custom Fields
Closing Periods	Administration > Security > Closing Periods	Not applicable (Stand-alone L/D)
Configuration Manager	Administration > System Configuration > Configuration Manager	Export Base Configuration Import Base Configuration Status
Cost Codes	Administration > Setup > Cost Codes	List View Record View Comments Documents
Crystal Clear Report Status	Administration > Crystal Clear Report Status	Not applicable
Custom Fields	Administration > Custom Fields > Custom Fields	Not applicable (Stand-alone L/D)
Customer Login	Start > Programs > Internet Explorer > Enter the URL provided by your system administrator > Customer Login	Not applicable
Customer Request	Note: This screen can only be accessed by using the Customer Request Login screen.	Not applicable
DC Transaction Prompts	Administration > Data Collection > DC Transaction Prompts	List View Record View Return Prompts
Documents	Administration > Setup > Documents	List View Record View

Screen	Default navigation	Tab or pop-up name
		Where Used Comments Documents
E-mail Notification Setup	Administration > E-mail Messenger > E-mail Notification Setup	Not applicable (Stand-alone L/D)
E-mail Templates	Administration > E-mail Messenger > E-mail Templates	List View Record View
E-mail Viewer	Administration > E-mail Messenger > E-mail Viewer	Not applicable (Stand-alone L/D)
Enterprise Search Setup	Administration > Enterprise Search Setup > Enterprise Search Setup	List View Record View Repositories Repository Columns
Equipment Setup	Administration > Equipment Setup	Options Equipment Types Equipment Statuses Equipment Criticality
eRecords Setup	Administration > Security > eRecords Setup	List View Record View
Export Configuration	Administration > System Configuration > Export Configuration	Export KPIs Export Inbox Items Export Custom Fields Export Flex SQL Export Custom Reports Export Alerts Export User Defined Grids Export Web Service Prompts Export Copied Screens Task Plans
Extensible Framework	Administration > Screen Configuration > Extensible Framework	Record View
Flex Business Rules	Administration > Screen Configuration > Flex Business Rules	List View Record View
General Settings	Administration > ENX Suite Screens > General Settings	
Generate Enterprise Search Definitions	Administration > Enterprise Search Setup > Generate Enterprise Search Definitions	Not applicable (Stand-alone)
GL Process Schedules	Administration > GL Process Schedules	List View Record View
Global Text Changes	Administration > Screen Configuration > Global Text Changes	Not applicable (Stand-alone L/D)
Grid Designer	Administration > Screen Configuration > Grid Designer	List View/Record View Fields

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Parameters Validation
Import Configuration	Administration > System Configuration > Import Configuration	Import Batch Document Upload
Inbox Setup	Administration > Start Center Setup > Inbox Setup	List View Record View User Groups Ranges Users
Install Parameter Setup	Administration > Security > Install Parameter Setup	List View Record View
Install Parameters	Administration > Security > Install Parameters	List View Record View
Job Setup	Administration > Data Collection > Job Setup	Not applicable (Stand-alone L/D)
KPI Setup	Administration > Start Center Setup > KPI Setup	List View Record View Ranges User Groups Children History Users
Languages	Administration > System Configuration > Languages	List View Record View Error Text Menu Text Code Descriptions Text Boiler Text Comments
Locales	Administration > System Configuration > Locales	List View Record View
Materials Setup	Administration > Materials Setup	Options
Menu Structure and Permissions	Administration > Overview > Menu Structure and Permissions	Not applicable
Mobile Devices	Administration > System Configuration > Mobile Devices	List View Record View
Mobile Setup	Administration > Mobile Setup	Options
Monitor Interface	Administration > Data Collection > Monitor Interface	List View/Record View Error Correction
Multi-org Security	Administration > Security > Multi-org Security	Not applicable (Editable Grid)
My Account	Main header drop-down on the left-hand pane	My Account

Screen	Default navigation	Tab or pop-up name
My Service Requests	Note: This screen can only be accessed by using the Service Request Login screen.	Not applicable
Organizations	Administration > Security > Organizations	List View Record View Comments Enterprise Locations Fiscal Years Options
Printers	Administration > System Configuration > Printers	List View Record View
Prompt Machine	Administration > Data Collection > Prompt Machine	Not applicable (Stand-alone L/D)
Purchasing Setup	Administration > Purchasing Setup	Options Expense Types Requisition Statuses PO and Transaction Statuses
Queries	Administration > Start Center Setup > Queries	List View Record View
Regions	Administration > Setup > Regions	List View Record View Comments Historical Temperatures Actual Temperatures Documents Temperature Analysis Chart
Report Organization Structure	Administration > Setup > Report Organization Structure	Not applicable (Stand-alone L/D)
Reports	Administration > Setup > Reports	List View Record View Parameters Text Comments
Roles Setup	Administration > Security > Roles Setup	List View Record View
Screen Setup	Administration > Screen Configuration > Screen Setup	List View Record View Comments Types Classes WO Equipment Types Operator Checklist Field Filters
Screens	Administration > Screen Configuration > Screens	List View

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Record View Text Fields to Remember Tabs Comments Custom Tabs Dataspies
Start Center Setup	Administration > Start Center Setup	Chart Setup Inbox Setup KPI Setup Queries
Status Authorizations	Administration > Security > Status Authorizations	Not applicable (Stand-alone L/D)
System Codes	Administration > Setup > System Codes	Not applicable (Stand-alone L/D)
User Defined Screens	Administration > Screen Configuration > User Defined Screens	List View Record View Fields
User Groups	Administration > Security > User Groups	List View Record View Menus Screen Permissions Users WO Authorizations Mobile Menus Charts Comments Documents Inbox Interface Permissions KPI Mobile Settings Scanner Menus Store Security iProcure Security
User Setup	Administration > Security > User Setup	List View Record View Comments Organizations Addresses Department Security Documents Inboxes KPIs

Screen	Default navigation	Tab or pop-up name
View Log Files	Administration > System Configuration > View Log Files	Not applicable (Stand-alone List)
Views	Administration > Screen Configuration > Views	Not applicable (Stand-alone List)
Web Service Prompts	Administration > Screen Configuration > Web Service Prompts	List View Record View Web Services Fields Retrieved Values
Work Setup	Administration > Work Setup	Options Work Order Types Work Order Statuses Work Order Priorities

Equipment menu

This table shows the default navigation path for the Equipment menu screens and the tab or pop-up name included on each screen:

Screen	Default navigation	Tab or pop-up name
Asset Inventory	Equipment > Asset Inventory > Asset Inventory	Parameters Inventory Results
Assets	Equipment > Assets	List View Record View Comments Events Costs PM Schedules Structure Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Fuel Costs Linear Overview Linear References Linear Where Used LOTO Keys

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Material Usage
		Meters
		Nonconformities
		Nonconformities Analysis
		OEE Metrics
		Open Repairs
		Open Work Orders
		Parts Associated
		Permits
		Purchase Orders
		Rankings
		Ranking Survey
		Reliability Calculations
		Reliability Growth
		Reservations
		Resources
		Routes
		Route Parents
		Safety
		Segments
		Segment Parents
		Service Codes
		Service Delivery Matrix
		Structure
		Structure Details
		Suppliers
		Supplier Service Codes
		Test Points
		Top 10 Breakdown
		Warranties
		Warranty Claims
		Work Order Repair Costs Chart
		Workspaces
Batch Meter Readings	Equipment > Process > Batch Meter Readings	Not applicable (Stand-alone L/D)
Batch Update Reliability Ranking Values	Equipment > Process > Batch Update Reliability Ranking Values	List View Record View Comments Reliability Survey Equipment Documents
Categories	Equipment > Setup > Categories	List View Record View Comments Calibration

Screen	Default navigation	Tab or pop-up name
		Documents Parts Associated Permits Safety Test Points
Change Notices	Equipment > Additional Features > Change Notices	List View Record View Comments Lines Assets Locations Addresses Documents Parts Associated
Child Equipment Replacement	Equipment > Process > Child Equipment Replacement	Not applicable (Stand-alone)
Closing Codes	Equipment > Setup > Closing Codes	List View Record View Classes
Closing Code Hierarchy	Equipment > Setup > Closing Code Hierarchy	Not applicable (Stand-alone)
Condition Score Matrix Setup	Equipment > Additional Features > Nonconformities > Condition Score Matrix Setup	List View Record View Comments
Departments	Equipment > Setup > Departments	List View Record View Addresses Comments Documents Structure Tools
Energy Star Message Viewer	Equipment > Additional Features > Energy Star > Energy Star Message Viewer	Not applicable (Stand-alone)
Energy Star Setup	Equipment > Additional Features > Energy Star > Energy Star Setup	Not applicable (Stand-alone)
Equipment Configurations	Equipment > Equipment Configuration > Equipment Configurations	List View Record View Comments Configurations Associated Structure PM Schedules Where Used Calibration Depreciation

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Documents Maintenance Patterns Meters Parts Associated Permits Safety Test Points Warranties
Equipment Evaluations	Equipment > Procurement Evaluation > Equipment Evaluations	List View Record View Comments Equipment Equivalency Cost Analysis Documents
Equipment Generation	Equipment > Equipment Configuration > Equipment Generation	List View Record View Details Preview
Equipment Operational Status	Equipment > Additional Features > Equipment Operational Status	List View Record View Comments Work Orders Documents
GIS Map Search	Equipment > GIS Map Search	Not applicable
Key Management	Equipment > Additional Features > Key Management	List View Record View Locks Transactions Ring Keys
Linear Direction Setup	Equipment > Linear Direction Setup	List View Record View
Locations	Equipment > Setup > Locations	List View Record View Comments Events Costs Structure Structure Details Addresses Documents LOTO Material Usage Meters

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Nonconformities Operator Checklists Open Work Orders Parts Associated Permits RCM Safety Service Codes Service Delivery Matrix Suppliers Supplier Service Codes
Maps	Equipment > Maps	<ul style="list-style-type: none"> List View Record View Comments Parameters Documents
Meters	Equipment > Setup > Meters	<ul style="list-style-type: none"> List View Record View Comments Documents
Nonconformities	Equipment > Additional Features > Nonconformities > Nonconformities	<ul style="list-style-type: none"> List View Record View Comments Documents Translations Observations Documents
Nonconformity Observations	Equipment > Additional Features > Nonconformities > Nonconformity Observations	<ul style="list-style-type: none"> List View Record View Comments Documents Checklist
Nonconformities Setup	Equipment > Additional Features > Nonconformities > Nonconformities Setup	<ul style="list-style-type: none"> List View Record View Comments Documents Status Dependencies
Nonconformity Types	Equipment > Additional Features > Nonconformities > Nonconformity Types	<ul style="list-style-type: none"> List View Record View Comments Documents Translations Parts

Default screen locations

Screen	Default navigation	Tab or pop-up name
		EMRS Material Types
Objectives	Equipment > Additional Features > Asset Management Policy > Objectives	List View Record View Comments Energy Targets CPRs (Plans) Documents
Operational Status	Equipment > Operational Status	List View Record View Work Orders
Policies	Equipment > Additional Features > Asset Management Policy > Policies	List View Record View Comments Strategies Documents
Positions	Equipment > Positions	List View Record View Comments Events Costs PM Schedules Structure Structure Details Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Energy Star Ratings Chart Fuel Costs Keys LOTO Linear Overview Linear References Linear Where Used Material Usage Meters Nonconformities Nonconformities Analysis OEE Metrics Operator Checklists

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Open Work Orders PM Repair Costs Chart Parts Associated Permits Purchase Orders Rankings Ranking Survey Reliability Calculations Reliability Growth Reservations Resources Routes Route Parents Safety Segments Segment Parents Service Codes Service Delivery Matrix Suppliers Supplier Service Codes Test Points Top 10 Breakdown Warranties Warranty CLaims Work Order Repair Costs Chart Workspaces
Profiles	Equipment > Setup > Profiles	<ul style="list-style-type: none"> List View Record View Comments Documents Parts Associated Permits
Reliability Ranking	Equipment > Setup > Reliability Ranking	<ul style="list-style-type: none"> List View Record View Comments Decision Tree Ranks Equipment Documents
Reservation Calendar	Equipment > Additional Features > Reservation Calendar	Not applicable
Risk Matrix Setup	Equipment > Setup > Risk Matrix Setup	<ul style="list-style-type: none"> List View Record View Comments

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Consequences Documents
Sets/Consists	Equipment > Sets/Consists	Record View Equipment
Strategies	Equipment > Additional Features > Asset Management Policy > Strategies	List View Record View Comments Objectives Structure
Systems	Equipment > Systems	List View Record View Comments Events Costs PM Schedules Structure Structure Details Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Energy Star Ratings Chart Fuel Costs LOTO Linear Overview Linear References Linear Where Used Keys Material Usage Meters Nonconformities Nonconformities Analysis OEE Metrics Open Work Orders Operator Checklists PM Repair Costs Chart Parts Associated Permits Purchase Orders Rankings Ranking Survey

Screen	Default navigation	Tab or pop-up name
		RCM Reservations Resources Routes Route Parents Safety Segments Segment Parents Service Codes Service Delivery Matrix Suppliers Supplier Service Codes Test Points Top 10 Breakdown Warranties Warranty Claims Work Order Repair Costs Chart Workspaces
Warranties	Equipment > Warranty > Warranties	List View Record View Comments Equipment Parts Components Documents VMRS Codes Warranty Claim vs. Settlement Chart
Warranty Claims	Equipment > Warranty > Warranty Claims	List View Record View Comments Activities Claim Lines Addresses Documents
Workspaces	Equipment > Additional Features > Workspaces	List View Record View Comments Documents Employees Equipment Furnishings Translations
Workspace Moves	Equipment > Additional Features > Workspace Moves	List View Record View

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Comments
		Documents
		Translations
		Associations

Materials menu

This table shows the default navigation path for the Materials menu screens and the tab or pop-up name included on each screen:

Screen	Default navigation	Tab or pop-up name
Add Parts	Materials > Create Requisition > Add Parts Note: This screen is not directly selectable. When you click on the Add Parts button from the Create Requisition screen, this screen will display.	Add Parts
Breakup Kit	Materials > Kits > Breakup Kit	Not applicable
Build Kit	Materials > Kits > Build Kit	Not applicable
Calculate EOQ	Materials > Process > Calculate EOQ	Parameters Preview
Commodities	Materials > Setup > Commodities	List View Record View Comments Documents Fuels
Create Requisition	Materials > Create Requisition	Create Requisition
Currencies	Materials > Setup > Currencies	List View Record View Exchange Rates Comments Documents
Greenhouse Gases	Materials > Setup > Greenhouse Gases	List View Record View Comments Documents
Generate ABC Analysis	Materials > Process > Generate ABC Analysis	Parameters Preview
Generate Requisitions	Materials > Process > Generate Requisitions	Parameters Preview

Screen	Default navigation	Tab or pop-up name
Internal Repair Receipts	Materials > Transactions > Internal Repair Receipts	List View Record View Comments Parts Documents
iProcure Vendors	Materials > Setup > iProcure Vendors	List View Record View Infor EAM Suppliers
Issue/Return Parts	Materials > Transactions > Issue/Return Parts	Not applicable
Lots	Materials > Setup > Lots	List View Record View Comments Bins Per Store Documents
Manufacturer Part Numbers	Materials > Overview > Manufacturer Part Numbers	Not applicable
Manufacturers	Materials > Setup > Manufacturers	List View Record View Comments Parts Addresses Documents
Non-PO Receipts	Materials > Transactions > Non-PO Receipts	List View Record View Comments Parts Documents
Part Condition Templates	Materials > Setup > Part Condition Templates	List View Record View Comments Conditions
Part Hierarchy Codes	Materials > Setup > Part Hierarchy Codes	Not applicable (Stand-alone L/D)
Part Inspections	Materials > Transactions > Part Inspections	List View Record View Comments Documents
Part Number History	Materials > Overview > Part Number History	Not applicable (Stand-alone)
Part Reservations	Materials > Overview > Part Reservations	Not applicable (Stand-alone)
Part Requisitions	Materials > Part Requisitions	List View Record View Documents

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Parts
Part Warranty Claims	Materials > Part Warranty Claims	List View Record View Parts Imported Parts
Parts	Materials > Parts	List View Record View Comments Stores Stock Suppliers Transactions Prices Stock Value Contracts Documents Greenhouse Gases Kit Template Manufacturers Nonconformity Types Overview PO History Parts Associated Purchase Orders Repair Details Requisitions Reservations Safety Sales Prices Substitutes Usage Where Used
Physical Inventory	Materials > Transactions > Physical Inventory	List View Record View Comments Parts
Pick Tickets	Materials > Pick Tickets	List View Record View Comments Parts Documents
PO Receipts	Materials > Transactions > PO Receipts	List View Record View

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Comments Packing Slip Active Lines Processed Lines Documents
Quick Store-to-Store Transfer	Materials > Transactions > Quick Store-to-Store Transfer	Quick Store-to-Store Transfer
Reasons for Return	Materials > Setup > Reasons for Return	<ul style="list-style-type: none"> List View Record View Comments Documents
Requisition Details	Materials > View Requisitions > Requisition Details Note: This screen is not directly selectable. When you select a record from the View Requisitions screen, this screen will open.	Requisition Details
Requisitions	Materials > Requisitions	<ul style="list-style-type: none"> List View Record View Comments Parts Services Documents Transactions eRecords Addresses Account Details Open Repairs
Review/Approve Requisitions	Materials > Review/Approve Requisitions	Review/Approve Requisitions
Store Groups	Materials > Setup > Store Groups	<ul style="list-style-type: none"> List View Record View Comments Transfer Fees
Store-to-Store Issues	Materials > Transactions > Store-to-Store Issues	<ul style="list-style-type: none"> List View Record View Comments Parts Addresses Documents
Store-to-Store Receipts	Materials > Transactions > Store-to-Store Receipts	<ul style="list-style-type: none"> List View Record View Comments Parts Addresses Documents

Default screen locations

Screen	Default navigation	Tab or pop-up name
Store-to-Store Requisitions	Materials > Store-to-Store Requisitions	List View Record View Comments Parts Addresses Documents
Stores	Materials > Setup > Stores	List View Record View Comments Bins Stock Transactions Addresses Documents Overview Reservations Stock in Transit Stockouts Taxes
Supplier Part Numbers	Materials > Overview > Supplier Part Numbers	Not applicable
Supplier Returns	Materials > Transactions > Supplier Returns	List View Record View Comments Parts Documents
Suppliers	Materials > Setup > Suppliers	List View Record View Comments Parts Contacts Addresses Account Numbers Commodities Documents Equipment Fuel Mix PO History Rates Service Code Exclusions Service Codes Services
Tax Codes	Materials > Setup > Tax Codes	List View Record View

Screen	Default navigation	Tab or pop-up name
		Rates Comments Documents
Tax Rate Types	Materials > Setup > Tax Rate Types	List View Record View Comments Documents
Tax Rates	Materials > Setup > Tax Rates	List View Record View Values Comments Documents
Units of Measure	Materials > Setup > Units of Measure	List View Record Comments Conversion Documents
View Requisitions	Materials > View Requisitions	View Requisitions

Operations menu

This table shows the default navigation path for the Operations menu screens and the tab or pop-up name included on each screen:

Screen	Default navigation	Tab or pop-up name
Analytics Variable Setup	Operations > Analytics Variable Setup	List View Record View Attributes
Budget Calendar Types	Operations > Budgets > Budget Calendar Types	List View Record View Comments Documents
Budget Groups	Operations > Budgets > Budget Groups	List View Record View Comments Items Documents
Budget Structures	Operations > Budgets > Budget Structures	List View Record View Comments

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Documents
Budget Terms	Operations > Budgets > Budget Terms	List View Record View Comments Periods Documents
Budgets	Operations > Budgets > Budgets	List View Record View Details
Bulletin Board Notices	Operations > Setup > Bulletin Board Notices	List View Record View
Calendar Groups	Operations > Setup > Calendar Groups	List View Record View Calendar Periods Comments Documents
Call Center	Operations > Call Center	List View Record View Comments WO Comments Documents
Call Center Setup	Operations > Setup > Call Center Setup	List View Record View GIS Attributes Equipment Usability Codes Documents
Case Management	Operations > Case Management	List View Record View Tasks Checklist eRecords Event Log Documents Comments Translations
Case Management Tasks	Operations > Case Management Tasks	List View Record View Comments Documents Checklist
Contact Information	Operations > Setup > Contact Information	List View Record View

Screen	Default navigation	Tab or pop-up name
		Equipment
Customer Surveys	Operations > Setup > Customer Surveys	List View Record View Questions Triggers Results Long Translations Documents Comments Translations
Data Warehouse Run Log	Operations > Data Warehouse Run Log	List View Details Errors
Data Warehouse Run Parameters	Operations > Data Warehouse Run Parameters	Not applicable (Stand-alone L/D)
Event Log Type Filter	Operations > Setup > Event Log Type Filter	Not applicable
Knowledge Base Articles	Operations > Setup > Knowledge Base Articles	List View Record View Service Delivery Matrix Equipment
Overview	Operations > Overview	Not applicable
Providers	Operations > Setup > Providers	List View Record View Comments Documents
Service Categories	Operations > Setup > Service Categories	List View Record View Comments Documents
Service Codes	Operations > Setup > Service Codes	List View Record View Comments Layers Sales Prices

Purchasing menu

This table shows the default navigation path for the Purchasing menu screens and the tab or pop-up name included on each screen:

Default screen locations

Screen	Default navigation	Tab or pop-up name
Assets for PO	Purchasing > Assets for PO	Not applicable (Stand-alone L/D)
Blanket Orders	Purchasing > Blanket Orders	List View Record View Comments Parts Partial Order Services Users Addresses Clauses Documents
Clauses of Contract Classes	Purchasing > Contracts > Clauses of Contract Classes	Not applicable (Stand-alone L/D)
Credit Cards	Purchasing > Setup > Credit Cards	List View Record View Comments Users Addresses
Delivery Addresses	Purchasing > Setup > Delivery Addresses	List View Record View
Generate POs	Purchasing > Process > Generate POs	Parameters Preview
Invoice Allocations	Purchasing > Invoice Allocations	Not applicable (Stand-alone L/D)
Invoice Lines per Buyer	Purchasing > Overview > Invoice Lines per Buyer	Invoice Lines per Buyer
Invoice Vouchers	Purchasing > Invoice Vouchers	List View Record View Comments Lines Costs Documents Utility Bills
PO Revision History	Purchasing > PO Revision History	List View Record View Comments Parts Services Clauses
PO Terms	Purchasing > Setup > PO Terms	List View Record View Comments Documents
PO Update	Purchasing > Process > PO Update	List View (editable)

Screen	Default navigation	Tab or pop-up name
Purchase Orders	Purchasing > Purchase Orders	List View Record View Comments Parts Services Documents Clauses Transactions eRecords Translations Tracking Addresses Account Details Open Repairs
Purchasing Clauses	Purchasing > Setup > Purchasing Clauses	List View Record View Comments Children Documents
Purchasing Contracts	Purchasing > Contracts > Purchasing Contracts	List View Record View Comments Parts Part Discounts Order Discounts Documents
Purchasing Contract Text	Purchasing > Contracts > Purchasing Contract Text	Not applicable (Stand-alone L/D)
Quotations	Purchasing > Quotes > Quotations	List View Record View Comments Parts Services Addresses Documents eRecords
Requests for Quotations	Purchasing > Quotes > Requests for Quotations	List View Record View Comments Suppliers Parts Clauses Services

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Selection
		Addresses
		Documents
		Purchasing
		eRecords

Work menu

This table shows the default navigation path for the Work menu screens and the tab or pop-up name included on each screen:

Screen	Default navigation	Tab or pop-up name
Adjustments	Work > Customer Contracts > Adjustments	List View Record View Comments Documents
Advanced Maintenance Planning Configuration	Work > Additional Features > Advanced Maintenance Planning Configuration	Exclude WO Types Status Change Triggers
AMS-Approve Customer Charges	Work > Additional Features > Asset Management Services > AMS-Approve Customer Charges	List View Record View
AMS-Customer Contracts	Work > Additional Features > Asset Management Services > AMS-Customer Contracts	List View Record View Comments Fixed Charges Documents
AMS-Customer Invoice Lines Overview	Work > Additional Features > Asset Management Services > AMS-Customer Invoice Lines Overview	List Only
AMS-Customer Invoices	Work > Additional Features > Asset Management Services > AMS-Customer Invoices	List View Record View Comments Lines Documents
AMS-Customers	Work > Additional Features > Service Request > AMS-Customers	List View Record View Comments Properties Callers Charges Contracts Documents

Screen	Default navigation	Tab or pop-up name
		Invoices
AMS-Pricing Schedules	Work > Additional Features > Asset Management Services > AMS-Pricing Schedules	List View Record View Comments Custom Trade Rates Custom Part Charges Additional Charges Documents WO Criteria
Approval Lists	Work > Revision Control > Approval Lists	List View Record View Comments Approvers Documents
Approve Inspection Results	Work > Process > Approve Inspection Results	Parameters Preview
Aspects	Work > Inspections > Aspects	List View Record View Comments Prompts Documents
Assets Healthcare	Work > Verticals > Healthcare > Assets Healthcare	List View Record View Comments Events Costs PM Schedules Structure Account Details Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Fuel Costs Linear References Material Usage Meters Parts Associated Permits Purchase Orders

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Reliability Survey Resources Service Delivery Matrix Test Points Warranties
Book Labor By Employee	Work > Process > Book Labor By Employee	Not applicable (Stand-alone L/D)
Book PO Labor	Work > Process > Book PO Labor	Not applicable (Stand-alone)
Calibration Results	Work > Additional Features > Calibration Results	List Only
Campaigns	Work > Projects > Campaigns	List View Record View Comments Campaign Events Equipment Work Orders Documents eRecords
Capital Planning Requests	Work > Additional Features > Capital Planning Requests	List View Record View Comments Documents
Conditions	Work > Inspections > Conditions	List View Record View Comments Documents
Contract Templates	Work > Contract Management > Contract Templates	List View Record View Comments WO Criteria Sales Prices Clauses Charge Definitions Discounts Documents
Contractor Portal	Work > Contractor Portal	Record View
Customers	Work > Contract Management > Customers	List View Record View Comments Contracts Addresses Documents
Customer Contracts	Work > Contract Management > Customer Contracts	List View Record View

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Comments Charge Definitions WO Criteria Commodities Adjustments Clauses Contract Items Discounts Documents Sales Prices
Customer Invoices	Work > Contract Management > Customer Invoices	<ul style="list-style-type: none"> List View Record View Comments Contract Items Generation Errors Invoice Details Documents
Depots	Work > Fuel Management > Depots	<ul style="list-style-type: none"> List View Record View Comments Tanks Pumps Tank/Pump Documents Transactions
Deferred Maintenance	Work > WO Planning > Deferred Maintenance	<ul style="list-style-type: none"> List View Record View Parts
Employees	Work > Setup > Employees	<ul style="list-style-type: none"> List View Record View Comments Rates Availability Exceptions Addresses Documents Outstanding Issues Properties Qualifications Transactions Transfers Types
Facilities	Work > Verticals > Hospitality > Facilities	<ul style="list-style-type: none"> List View Record View

Default screen locations

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Comments Events Costs PM Schedules Structure Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Fuel Costs Linear References Material Usage Meters Parts Associated Permits Purchase Orders Reliability Survey Resources Service Delivery Matrix Test Points Warranties
Findings	Work > Inspections > Findings	<ul style="list-style-type: none"> List View Record View Comments Classes Documents
Fleet Billing Codes	Work > Additional Features > Fleet > Fleet Billing Codes	<ul style="list-style-type: none"> List View Record View Comments Rates Documents
Fleet Bills	Work > Additional Features > Fleet > Fleet Bills	<ul style="list-style-type: none"> List View Record View Comments Billing Details Pool/Loaner Adjustments Assignment Adjustments Documents
Fleet Configuration	Work > Additional Features > Fleet > Fleet Configuration	<ul style="list-style-type: none"> Parameters Billing Schedules Exception Codes

Screen	Default navigation	Tab or pop-up name
		Vehicle Ticket Authorizations Fuel Maintenance
Fleet Cost Code Search & Replace	Work > Additional Features > Fleet > Fleet Cost Code Search & Replace	Cost Codes Errors
Fleet Customers	Work > Additional Features > Fleet > Fleet Customers	List View Record View Comments Cost Codes Billing Codes Billing History Addresses Documents
Fleet Markup Codes	Work > Additional Features > Fleet > Fleet Markup Codes	List View Record View Rates Comments Documents
Fleet Vehicle Tickets	Work > Additional Features > Fleet > Fleet Vehicle Tickets	List View Record View Comments Exceptions Billing Adjustments Documents
Formulas	Work > Inspections > Formulas	List View Record View Parameters Comments
Fuel Physical Inventory	Work > Fuel Management > Fuel Physical Inventory	List View Record View Comments Tanks
Fuel Issues	Work > Fuel Management > Fuel Issues	Fuel Issues
Fuel Receipts	Work > Fuel Management > Fuel Receipts	Fuel Receipts
Fuels	Work > Fuel Management > Fuels	List View Record View Comments Depot/Tank Documents Transactions
Generate Production Requests	Work > Additional Features > Advanced Maintenance Planning > Generate Production Requests	Parameters WO Preview

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Production Request Preview
Generate WOs	Work > Process > Generate WOs	Parameters Preview
Hazards	Work > Permit to Work > Hazards	List View Record View Comments Documents Precautions Where Used
Incident Requests	Work > Verticals > Hospitality > Incident Requests	List View Record View Comments WO Comments Documents
Information Requests	Work > Service Request > Information Requests	List View Record View Comments Documents
Isolation Points	Work > Permit to Work > Isolation Points	List View Record View Comments Documents Permit to Work
Job Plan	Work > Job Plans	List View Record View Instructions Qualifications Sales Prices Checklist Prices Plan Labor Plan Parts Plan Tools Estimated Costs Suppliers Documents eRecords
Lockout Boxes	Work > Permit to Work > Lockout Boxes	List View Record View Comments Documents
Material Lists	Work > WO Planning > Material Lists	List View

Screen	Default navigation	Tab or pop-up name
		Record View Comments Parts Documents
Maintenance Patterns	Work > WO Planning > Maintenance Patterns	List View Record View Comments Sequences Equipment Work Orders Documents
Mechanic's Workbench	Work > Mechanic's Workbench	Not applicable (Stand-alone)
Methods	Work > Inspections > Methods	List View Record View Comments Documents
Monitored Data	Work > Inspections > Monitored Data	List View Equipment Details Points Aspects Aspect Points Point Conditions Results
Operator Checklist	Work > Additional Features > Operator Checklist	Not applicable (Stand-alone)
Permits	Work > Permit to Work > Permits	List View Record View Permit Body Documents
Permit to Work	Work > Permit to Work > Permit to Work	List View Record View Comments Documents Safety LOTO Checklist Conflicts Event Log eRecords
Permit to Work Setup	Work > Permit to Work > Permit to Work Setup	List View Record View Comments Documents

Default screen locations

Screen	Default navigation	Tab or pop-up name
Point Types	Work > Inspections > Point Types	List View Record View Comments Documents
PM Forecasting	Work > WO Planning > PM Forecasting	Parameters Preview Forecasting
PM Plans	Work > WO Planning > PM Plans	List View Record View PM Schedules Activities Equipment Comments Documents
PM Schedules	Work > WO Planning > PM Schedules	List View Record View Comments Activities Equipment Permits Work Orders Documents Resources Safety Sales Prices Jobs Plan Labor Plan Parts Estimated Costs Plan Tools Translations eRecords Breakdown Linear Work
PM Work Packages	Work > WO Planning > PM Work Packages	List View Record View Comments Equipment Employees Documents
Precautions	Work > Permit to Work > Precautions	List View Record View Comments Documents

Screen	Default navigation	Tab or pop-up name
Production Requests	Work > Additional Features > Advanced Maintenance Planning > Production Requests	List View Record View Comments Resources Work Orders Documents
Projects	Work > Projects > Projects	List View Record View Comments Budgets Work Orders Costs Documents Purchase Orders Sub-projects User Authorization
Project Budgets	Work > Projects > Project Budgets	List View Record View Comments Documents
Properties	Work > Service Request > Properties	Not applicable
Properties Healthcare	Work > Verticals > Healthcare > Properties Healthcare	List View Record View Comments Events Costs PM Schedules Structure Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Fuel Costs Linear References Material Usage Meters Parts Associated Permits Purchase Orders Reliability Survey

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Resources Service Delivery Matrix Test Points Warranties
Property Information	Work > Service Request > Property Information	Not applicable
Qualifications	Work > Setup > Qualifications	List View Record View Comments Documents
Release Individual PM WOs	Work > Process > Release Individual PM WOs	List View (editable)
Reservation Requests	Work > Contract Management > Reservation Requests	List View Record View Comments
Reservations	Work > Contract Management > Reservations	List View Record View Comments Adjustments Charge Definitions Documents
Review Reservation Requests	Work > Contract Management > Review Reservation Requests	Not applicable (Stand-alone)
Review Operator Checklist	Work > Additional Features > Operator Checklist > Review Operator Checklists	Not applicable (Stand-alone L/D)
Review Work Requests	Work > Review Work Requests	Not applicable
Revision Approval	Work > Revision Control > Revision Approval	List View Approvers Parent PMs
Revision Control History	Work > Revision Control > Revision Control History	List Only
Revision Control Setup	Work > Revision Control > Revision Control Setup	Work Orders Hazards Isolation Points Nonconformities Precautions Permits
Rooms	Work > Verticals > Hospitality > Rooms	List View Record View Comments Events Costs PM Schedules Structure Actual Consumption

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Fuel Costs Linear References Material Usage Meters Parts Associated Permits Purchase Orders Reliability Survey Resources Service Delivery Matrix Test Points Warranties
Routes	Work > WO Planning > Routes	<ul style="list-style-type: none"> List View Record View Comments Equipment Documents Inspection Points
Service Codes	Work > Service Request > Service Codes	<ul style="list-style-type: none"> List View Record View Documents
Service Request Portal	Accessed via a special URL.	
Service Request Portal - Create Request	Accessed via a special URL.	
Service Requests	Work > Service Requests	<ul style="list-style-type: none"> List View Record View Comments Log Entries Book Hours Issue Parts Closing Book & Close Documents Work Order Details
Shifts	Work > Setup > Shifts	<ul style="list-style-type: none"> List View Record View Days

Default screen locations

Screen	Default navigation	Tab or pop-up name
		<ul style="list-style-type: none"> Employees Comments Documents
Shutdowns	Work > Projects > Shutdowns	<ul style="list-style-type: none"> List View Record View Comments Equipment Documents
Standard WOs	Work > WO Planning > Standard WOs	<ul style="list-style-type: none"> List View Record View Comments Activities Children Documents Permits Safety Sales Prices Tools
Supervisors	Work > Setup > Supervisors	<ul style="list-style-type: none"> List View Record View Comments Documents
Systems Healthcare	Work > Verticals > Healthcare > Systems Healthcare	<ul style="list-style-type: none"> List View Record View Comments Events Costs PM Schedules Structure Actual Consumption Addresses Calibration Depreciation Design Consumption Documents Energy Star Ratings Fuel Costs Linear References Material Usage Meters Parts Associated Permits Purchase Orders Reliability Survey

Screen	Default navigation	Tab or pop-up name
		Resources Service Delivery Matrix Test Points Warranties
Task Plan	Work > WO Planning > Task Plans	List View Record View Instructions Checklist Documents Prices Jobs Plan Labor Plan Parts Plan Tools Estimated Costs Qualifications Sales Prices Suppliers
Tools	Work > Setup > Tools	List View Record View Outstanding Issues Transactions Comments Documents
Trades	Work > Setup > Trades	List View Record View Rates Comments Documents Qualifications Supplier Rates
Unreturned Cores	Work > Overview > Unreturned Cores	List Only
Vehicles	Work > Verticals > Hospitality > Vehicles	List View Record View Comments Events Costs PM Schedules Structure Actual Consumption Addresses Calibration Depreciation

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Design Consumption Documents Energy Star Ratings Fuel Costs Linear References Material Usage Meters Parts Associated Permits Purchase Orders Reliability Survey Resources Service Delivery Matrix Test Points Warranties
Work Requests	Work > Work Requests	Not applicable
VMRS Codes	Work > Setup > VMRS Codes	List View Record View Comments Documents Translations Nonconformity Types
WO Daily Scheduling	Work > WO Planning > WO Daily Scheduling	Parameters Equipment Preview WO Activity Preview Employee Preview Daily Scheduling Shift Scheduling
WO Load Balancing	Work > WO Planning > WO Load Balancing	Parameters Preview Balance Load
WO Scheduling	Work > WO Planning > WO Scheduling	Not applicable
WO Quick Close	Work > WO Quick Close	Work Order Quick Close
WO Quick Entry	Work > WO Quick Entry	Not applicable
WO Update	Work > Process > WO Update	List View (editable)
Work Orders Healthcare	Work > Verticals > Healthcare > Work Orders Healthcare	List View Record View Comments Activities Book Labor Closing Parts

Screen	Default navigation	Tab or pop-up name
		Cost Summary Additional Costs Book Vendor Hours Calibration Children Customer Requests Documents Equipment Inspections Meter Readings Monitored Data Results Part Failures Permits Plan Tools Purchasing Qualifications Repair Parts Resources Schedule Labor Schedule Tools Service Request Details Survey Equipment Tools Usage
Work Orders	Work > Work Orders	List View Record View Comments Activities Book Labor Closing Parts Cost Summary Additional Costs Book Vendor Hours Calibration Checklist Children Customer Requests Documents Equipment Inspections Meter Readings Monitored Data Results Nonconformities Part Failures

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Permits
		Plan Tools
		Purchasing
		Qualifications
		Related Work Order History
		Related Work Orders
		Repair Parts
		Resources
		Safety
		Schedule Labor
		Schedule Tools
		Service Request Details
		Survey Equipment
		Tools Usage
		Jobs
		Plan Labor
		Repairs
		Linear Overview
		Part Failures
Work Orders Hospitality	Work > Verticals > Hospitality > Work Orders Hospitality	List View
		Record View
		Comments
		Activities
		Book Labor
		Closing
		Parts
		Cost Summary
		Additional Costs
		Book Vendor Hours
		Calibration
		Children
		Customer Requests
		Documents
		Equipment
		Inspections
		Meter Readings
		Monitored Data Results
		Part Failures
		Parts Associated
		Permits
		Plan Tools
		Purchasing
		Qualifications
		Repair Parts

Default screen locations

Screen	Default navigation	Tab or pop-up name
		Resources
		Schedule Labor
		Schedule Tools
		Service Request Details
		Survey Equipment
		Tools Usage
Work Requests	Work > Work Requests	Not applicable

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