



Infor EAM System Administrator Guide

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About this guide

Objectives

This guide contains procedures for configuring the application modules.

Intended audience

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

Organization of this guide

This table shows the chapters and appendices of the guide:

Chapter	Description
System configuration	Instructions on how to set up the system 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 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 EAM with GIS
Fleet management configuration	Instructions on how to configure the fleet management module
Archiving management	Instructions on how to archive records
Basic module data creation	Instructions on how to set up basic module data
Web service prompt execution	Instructions on how to create user-defined screens that utilize web services on which the system is web-architected

Chapter	Description
Installation parameters	Instructions on how to understand installation parameters and methods for modifying
Organization options	Lists the organization options for multi-organization security (MOS)
Default screen locations	Lists the default navigation paths for screens in the system

Related documents

You can find the documents in the product documentation section of the Infor Support Portal.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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

Chapter 1: System configuration

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.

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

Install Parameter

Specify a unique code identifying the installation parameter, and then provide 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

Specify 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.

- 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**.

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.

- 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.
- **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 83.

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 application.

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**.

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.

- 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 pop-up window 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 pop-up window is closed.
Note: If the amount of time it takes to run a Dataspy exceeds the value (time) set for install parameter DSSLTIME, the **Slow** check box is automatically selected. If a Dataspy has been flagged as slow, when that Dataspy is run, the columns from the Dataspy are loaded however the data is not loaded. You have the option to click **Run** to load the data, or to modify the Dataspy to improve performance. Contact your system administrator for more information.

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.

- 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](#) pop-up window is opened.

Creating user defined screens

Create, modify, delete, and view 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.

- 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
- Check box

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**, **Check box**, **Date**, **Date Time**, and **Time** cannot be selected as primary key fields.
- 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.

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

Custom Field

Specify 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 these 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.
- **System Entity**
Code description of an Infor EAM entity. The system enables the System Entity field.

System Entity

Specify 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**.

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 entities or classes

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.

- 1 Select **Administration > Custom Fields > Associate Custom Fields**.
- 2 Specify the entity to which to associate the custom field.
- 3 Click **Add Custom Field**.
- 4 Specify this information:

Line

Specify the desired order for displaying the custom fields. Fields associated with the entity (to class *) are shown first, and then the fields associated with the particular class of the data are shown.

Custom Field

Specify the code of the custom field.

UOM

Specify the unit of measure.

Lookup Type

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

- **None**
Specify 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.

- **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 Update-able

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

Display boiler text where used in the system.

- 1 Select **Administration > Setup > Global Text Changes**.
- 2 Specify the search criteria in the Dataspy, and then select the record to update. **Current Text**, **Original Text**, **Language**, **Code**, and **Last Updated** are automatically populated.
- 3 Click **Where Used**.
- 4 All screens where the selected record appears are shown.

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 28.

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

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

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

- 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 specify 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 Management 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), file name (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.

Removing document associations

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

- 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

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

Organization

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

Printer

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

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

Destination

Specify a unique destination identifying the path to the printer.

Special

Select this check box 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.

- 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.

Notebook Definition

Select the notebook definition with which to associate the class.

Note: **Property Definition** and **Notebook Definition** apply only to the OBJ entity.

5 Click **Submit**.

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

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.

- 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 these options:

Option	Description
Add Custom Field	Click the Add Custom Field link button to add a new custom field to associate with a selected class. Specify the custom field information detailed in the next step.
Custom Field	In the Custom Field lookup, specify the existing custom field to associate with the selected class. The Custom Fields page is displayed.

- 4 Specify this information:

Custom Field

Specify a code for the new custom field, and then enter a description in the adjacent field.

Line

Specify 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

Specify the minimum value required for the custom field.

Maximum Value

Specify 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:

- **Filter 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.

- **Filter 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.

- **Filter 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** check box 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** check box 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** check box is selected on the **Record View** screen.

- 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 check box is selected, the equipment type or work order type is defaulted 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.

- 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** check box 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.

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.

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

Description

Specify a description of the part code hierarchy.

Specify 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].

- 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.

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

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

Description

Specify a description of the capital request categorization code.

Major Group Element

Specify the major group element.

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

Group Element

Specify the group element.

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

Individual Element

Specify 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.

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

View the status values of audit triggers.

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

2 Specify 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 these options:

Option

Description

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 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.

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

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

3 Select the check box 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.

- 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** check box 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 canceled.
- 6 Optionally, select the **Reverse Return Code** check box 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** check box 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.

Installation Code	Example	Description
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. The **E-mail Templates** tab also shows records synced from the mobile device.

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

E-mail Template

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

E-mail

Select this check box to send the notification to the email address in the recipients field.

Push Notification

Select this check box to send the notification to both the email address and the push notification ID.

Note: If **E-mail** is unselected and **Push Notification** is selected, the notification will send the push notification but not an email.

Notebook E-mails

Select this check box to indicate that the template is created for sending notebook emails.

From E-mail

Specify the from e-mail address.

E-mail Recipients

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

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

Specify 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

- 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

Specify the e-mail template to send when this e-mail notification is activated.

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

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

To Status

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

Active

Select to make the selected record active. The check box may be cleared if you add, modify, or delete parameters or conditions.

Include URL

Select to include the URL in the notification.

This check box 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

Include Documents as Attachments

Select to include documents as attachments in the email.

This check box is available only for the following tables:

MAM_TABLE	MAM_RENTITY	MAM_ENTITY	MAM_DOCPK
R5EVENTS	EV	EVNT	evt_code
R5MOBILENOTE-BOOKS	MNBK	MNBK	mnb_code
R5ORDERS	PORD	CF	ord_code#ord_org
R5OBJECTS	OBJ	O	obj_code#obj_org
R5PARTS	PART	PC	par_code#par_org

Comments

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

- 5 Click **Submit**.

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.

- 1 Select **Administration > E-mail Messenger > E-mail Notification Setup**.
- 2 Specify 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
Specify the parameter number for the e-mail notification.
Note: The parameter must be in a range of 1 to 15.
Column
Specify 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: **Active** is cleared 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.

- 1 Select **Administration > E-mail Messenger > E-mail Notification Setup**.
- 2 Specify 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

Specify 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.
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**

Specify the value of the e-mail notification condition.

Specify 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 134.

Creating alerts

Create e-mail and work order alerts for specific equipment.

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

2 Click **New Record**.

3 Specify a description for the alert.

Active

Select to set this alert to active.

4 Specify this Alert Definition Details information:

Grid Name

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

Dataspy

Select the Dataspy for the grid.

Exception Entity

Specify the exception entity.

Grid Key Field 1

Specify 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.

Grid Key Field 2

Specify 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.

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

Specify 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

Specify 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

Specify 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**.

Specify the user-defined fields.

6 Specify this Scheduling information:**Frequency**

Specify 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

Specify the next date to evaluate the alert.

7 Specify this Active Alert Types information:**Work Order**

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

E-mail

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

ION Pulse

Select to create an ION Pulse alert based on specific parameters.

Generate WOs

Select to create a generate WO alert based on specific parameters.

8 Click **Save Record**.

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.

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

Comments

Specify 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.

- 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 Optionally, to associate work order fields to grid fields, click **Additional Field Mapping**.
See [Mapping additional fields for work order alerts](#) on page 60.
- 6 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 61.

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.

- 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

Specify the e-mail template to send.

Delay Between Alerts

Specify 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: 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.

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."

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

- 2 Create an alert.

Note: Alerts can be created on the **Work Order Alerts** or **E-mail Alerts** page, by clicking **Create Parameters**. You may also access this pop-up window by clicking **Create Parameter** on this page.

- 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 pop-up window 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. A degree day reference point (temperature) must first be defined for each region. The standard degree day reference point is 65° Fahrenheit or 18° Celsius.

Degree days are classified as cooling or heating. If the average daily temperature rises above the 65° Fahrenheit (18° Celsius) degree day reference point, the day is considered a cooling degree day because the buildings typically require cooling.

A cooling degree day is determined by the number in degrees that the average temperature rises above the 65° Fahrenheit (18° Celsius) reference point.

Table 1: Example of cooling degree day in Fahrenheit

Date	Average Temperature	Degree Days Reference Point	Cooling Degree Day
4/30/17	79° F	65° F	14

If the average daily temperature falls below that reference point, the day is considered a heating degree day because the buildings typically require heating. A heating degree day is represented by the number of degrees that the average temperature falls below the defined temperature.

Table 2: Example of heating degree day in Fahrenheit

Date	Average Temperature	Degree Days Reference Point	Heating Degree Day
12/21/17	35° F	65° F	30

To create and edit region codes:

- 1 Select **Administration > Setup > Regions**.
- 2 Click **New Record** to create a new region, or select an existing region to modify.
- 3 Specify this information:

Region

Specify a unique code identifying the new region, and then specify a description for the region.

Organization

Select the organization.

Postal Code

Specify the postal code of the region.

Class

Select a class for the region.

Degree Day Reference Point

Specify a value for the degree day reference point. The value is the specific outside temperature at which no heating or cooling is typically required. The default values are 65° Fahrenheit and 18° Celsius depending on your region's default unit of measure.

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

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

- 4 Optionally, select the **Out of Service** check box to designate the region is not being used.
- 5 Choose **Fahrenheit** or **Celsius** to set the region's default unit of measure for degree day data.
- 6 Click **Save Record**.

Recording actual temperature data for regions

Record actual temperature data for heating degree days and cooling degree days for each day of the year. Store actual highs, lows, and average temperatures and degree days.

To record actual temperature data for a region:

- 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

Specify the date for which to record actual temperatures for the region.

Temperature Minimum

Specify the minimum temperature for which to record actual temperature data for the region.

Temperature Maximum

Specify the maximum temperature for which to record actual temperature data for the region.

- 5 **Temperature Average**, **Heating Degree Days**, and **Cooling Degree Days** for the region are re-calculated based on the minimum and maximum temperatures specified.
- 6 Optionally, click **Get Actual Temperatures** to get actual data including the high, low, and average temperatures for specific dates.
- 7 Click **Submit**.
- 8 Optionally, to delete actual temperature data for a specific date, select the actual temperature record for which to delete, and then click **Delete Actual Temperature**.
- 9 Optionally, to purge actual temperature records to a specific date, click **Purge Actual Temperature Records**.

Updating historical temperature data for regions

View recorded historical averages for degree days, high, low, and average temperatures in your region. Update minimum and maximum temperature values to update the historical data for average temperatures and heating and cooling degree days for each day of the year in the region.

To update historical temperature data for a region:

- 1 Select **Administration > Setup > Regions**.
- 2 Select a region code for which to update historical temperature data, and then click the **Historical Temperatures** tab.
- 3 Specify this information:
Temperature Minimum
Specify the new minimum temperature.
Temperature Maximum
Specify the new maximum temperature.
- 4 **Temperature Average**, **Heating Degree Days**, and **Cooling Degree Days** for the region are re-calculated based on minimum and maximum temperatures specified.
- 5 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 (WRJOBFB).

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.

Generating QR codes

Generate QR codes for multiple uses.

To generate a QR code:

- 1 Select **Administration > QR Codes Setup**.
- 2 Specify this information:
Server URL
Specify the URL to open once the QR code is scanned.
Tenant
Specify the tenant ID, or logical name given to the DB schema to which the application is connecting.
For example, typically the tenant is part of the URL and is mentioned within the URL as follows:
If the URL is
<http://ittyyyvwqeamvw1.infor.com:5555/web/base/logindisp?tenant=QAORA0409>
then **Server URL** is
`http://ittyyyvwqeamvw1.infor.com:5555/`
and **Tenant ID** is
`QAORA0409`.
Organization
Specify the organization to which the QR code belongs.
- 3 Click **Generate QR Code** to display the image.

Chapter 2: System security

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 14.

After activating MOS, you cannot deactivate it. Depending on the type of security set up, users cannot 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 user's default organization is shown at login, which can be changed to any organization to which the user has access. 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 record to the organization of the current login session is automatically defaulted; 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, **Organization** is not shown 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. Edit organization details as necessary.

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 provide 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.

Specify 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 left blank, the value is automatically set 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 left blank, the value is automatically set 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 left blank, the value is automatically set 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.

Note: 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.

Calendar Group

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

- 4 Optionally, select the **Common** check box to indicate the organization is common. Information defined for common organizations are shared among all organizations.
Note: After defining an organization as common, you cannot change it to be a specific organization. You cannot delete common organizations.
- 5 Click **Save Record**.

Adding enterprise locations to organizations

Add, change, or delete enterprise locations on the [Organizations](#) screen.

- 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
Specify a BOD Group.
Enterprise Location
Specify a unique name identifying the enterprise location.
- 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.

Note: 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.

- 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

Specify the date on which the fiscal year begins.

End Date

Specify the date on which the fiscal year ends.

- 5 Click **Submit**.

Note: 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**.

Adding options for organizations

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

For a comprehensive list of organization options, see [Organization options](#) on page 251.

- 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 for the organization.

Description

Specify a description of the option.

Value

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

- 5 Click **Submit**.

Adding users to organizations

Users may belong to more than one organization across your enterprise. You can manually add users to an organization, import a single user or multiple users from one organization to another, view users assigned to organizations, or modify the users of an organization.

- 1 Select **Administration > Security > Organizations**.
- 2 Select the organization to which to add the user(s), and then click the **Users** tab.
- 3 Click **Add Record**.
- 4 Specify this User Details information:
 - User Group**
Specify the user group the user you are adding, belongs to.
 - User ID**
Specify the user ID of the user you are adding.
 - Default**
Click this check box to indicate this organization is the user's default organization.
- 5 Optionally, specify requisition, invoice, purchase order and pick ticket approval limits for users.
- 6 Click **Submit**.

Importing users to an organizations

You can manually add users to an organization, or you can import multiple users from one organization to another.

- 1 Select **Administration > Security > Organizations**.
- 2 Click the **Users** tab.
 - Note:** Optionally, on this screen you may select the organization to which to import the user(s) prior to opening the **Import Users** pop-up window.
- 3 Click **Actions**, and then select **Import Users**. The **Import Users** pop-up window is opened.
- 4 In the pop-up window, specify this information:
 - From Organization**
Specify the organization from which the users are being imported.
 - To Organization**
Specify the organization to which you are importing the users.
 - Select**
Use this check box to select the users you will import.
 - Note:** Optionally, use the Dataspy to filter records for selection by user groups, class, or other specifications, and then click **Run**. The grid is then populated with user records as determined by the filter selection. Use the **Select** check box to indicate which user records you will import.
 - Note:** Requestor users will not have their user group values overwritten when imported to a non-Requestor user group. Similarly, non-Requestor users will not have their user group overwritten when imported to a Requestor user group.
- 5 Click **Submit**. The **Import Users** pop-up window is closed, and the **Users** tab is then populated with the newly imported user records.

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 14.

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**.

Managing 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 assigned to user groups

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

- 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.

- 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

Specify the function to set up for this user group. The description is automatically populated in the adjacent field.

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 clear **Query**, **Update**, and **Delete** are automatically cleared.

When you select either **Update** or **Delete**, **Query** is automatically selected.

- 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

System administrators have the ability 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.

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

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.

- 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 sub-menu you wish to view. The menu and/or sub-menu and are expanded and the folders and screens that reside at various levels below the main menu and/or sub-menu structure are displayed.
- 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 permissions to insert or update to a screen, the user group must also have Query permissions to that screen.

When you clear the 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.
- 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.

- 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

Any error messages associated with the tab are displayed.

- 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. To Group** is automatically populated with the current user group.
- 4 Specify this information:
From Group
Specify the user group from which to copy the menu.
- 5 Click **Submit**.

Viewing page-level help

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

To view page-level help:

- 1 Browse to the screen for which to view help.
- 2 On the toolbar, click **Help**.
- 3 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 16.

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 users groups can access.

- 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: Clear the **Active** check box to turn off security per button. By clearing **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 menus in Windows Mobile devices for user groups

Infor EAM Mobile menus can be configured in Infor EAM application 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.

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to set up Windows Mobile menus, and then click the **Windows Mobile Menus** tab.
- 3 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 pop-up window is shown.
- 4 Specify this information:
Label
Specify the label for the Main Menu Folder.
- 5 Click **Submit**. The record is saved and **Menu Details** is updated.
- 6 Highlight a **Main Menu Folder**, and then click **Add Sub-Menu Folder**. The Add Sub-Menu Folder pop-up window is shown.
- 7 Specify this information:
Label
Specify the label for the Sub-Menu Folder.
- 8 Click **Submit**. The record is saved and **Menu Details** is updated.
- 9 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.
- 10 Repeat above steps to configure all menu items.
- 11 To show or hide a menu item, select a menu item and click **Show Menu Item** or **Hide Menu Item**.

- 12 To delete a menu item, select a menu item and click **Delete Menu Item**.
- 13 To change the label of an existing menu item, select a menu item and click **Change Label**.
- 14 To change the icon of the Main Menu item, select a menu item and click **Change Icon**. The Change Icon pop-up window is shown. 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.

Setting default values for user groups in mobile applications

Configure the default value settings for user groups in the Infor EAM Transit application or mobile devices. The data specified here defines the settings on the EAM Transit app.

- 1 Select **Administration > Security > User Groups**.
- 2 Select the user group for which to set default values in mobile applications, and then click the Mobile Settings tab.
- 3 Specify this Work information:

Download Work Orders

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

Download Inspection Results

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

Download Task

Select the check box to download tasks by default for the user group.

Download Work Order Nonconformity

Select the check box to download nonconformity work orders by default for the user group.

Download Permit to Work

Select the check box to download permits to work by default for the user group.
Specify the Dataspy for which to download permits to work in **For Dataspy**.

- 4 Specify this Equipment information:

Download Equipment

Select the check box 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 check box 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 check box 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 check box 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 check box 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 Meter Reading

Select the check box to download meter readings by default for the user group.

Download Equipment History Comments

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

Download Linear Asset Information

Select the check box to download linear asset information by default for the user group.

Download Equipment Nonconformity

Select the check box to download equipment nonconformities by default for the user group.

Download Mobile Notebook

Select the check box to download mobile notebook records by default for the user group.

In **For Latest (Months)**, specify the latest number of months for which to download to mobile by default for the user group. For example, specify 6 to limit the data downloaded to the mobile device to the last 6 months of data.

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

Select the check box to download stores by default for the user group.

Download Parts

Select the check box 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 check box 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 check box 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 check box to download the list of suppliers by default for the user group.

Download Asset Inventory

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

Download Stock

Select the check box to download stock by default for the user group.

Download PO Receipt

Select the check box to download purchase order receipts by default for the user group.

6 Specify this Other information:**Download eSignature Settings**

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

Download Document with Print on Work Order

Select the check box to download a document when a work order is printed, by default for the user group.

7 Click **Save Record**.

Managing users

Now that you've defined organizations within your enterprise and created user groups to further configure security and privileges, create users as members of user groups to grant them access to the system. After setting up a new system user, associate the user with multiple organizations, but establish a default organization for the user. When the user logs in to the system, the user's default organization determines the user group permissions for that system session.

Creating users

Set up new system users or modify existing user records.

Caution: Use the **Revoke** button to remove user records and all references to the record for GDPR compliance. You must first select the user record to revoke, and then click **Revoke**. This process is not reversible.

- 1 Select **Administration > Security > User Setup**.
- 2 Click **New Record**.
- 3 In the **User ID** field, provide a unique code identifying the user. Provide the full name or a description of the user in the adjacent field.
- 4 In the User Details section, specify this information:

Language

Select the default language for the user.

User Group

Specify the user group to which the user is assigned.

Password

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

Password Expiration Date

Specify the date the password expires.

External User ID

Include 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**.

Success Msg. Timeout

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

First Screen

Specify the code identifying the default screen for the user when logging in to the system.

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.

- 5 Optionally, in the User Details section, select the check boxes to configure the user's access, user interface, rights, and permissions across the application.

Option	Description
Buyer	Select if the user can generate requisitions and purchase orders to buy materials and services. Note: Buyer must be selected for a user to show 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. Note: If unselected the Edit Dataspy button is hidden throughout the system on every form for this user.
Mobile Administrator	Select if the user is an administrator for Infor EAM Mobile.
Allow Global Dataspy Configuration	Select if the user can configure global Dataspy settings for all users.
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 enable accessibility mode for the user. If selected, the user will operate in accessibility mode when they next log in to Infor EAM.
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.
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 Viewing Private Notebook	Select to enable the user to view private Notebook screen records.
Allow Contains Search in Dataspy and Quick Filter	Select to enable the user to access the "Contains" and "Does Not Contain" operators when using Dataspy filters to search.
Allow Changes to Mobile Settings	Select to enable the user to make changes to settings in mobile devices.
6	Optionally, in the User Limits section, specify the maximum amounts the user can enter or approve for requisitions, invoices, non-purchase order invoices, purchase orders, and pick tickets. 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.
7	Optionally, click Upload Profile Picture to select and upload a profile picture for the user record.

- 8 Click **Save Record**.

Configuring EAM product access for users

Select which EAM applications the user will access and be an active user.

Caution: 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).

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user record for which you are configuring product access.
- 3 Optionally, in the Infor EAM Products section, select which applications the user will access:

Option	Description
Infor EAM	Select to indicate the user will use an active license.
Connector	Select to indicate the user will use an active license.
Analytics	Select to indicate the user will use an active license. Note: If you select Infor EAM Analytics for the user, you must also select Infor EAM as a product for the user if the user will create variables within EAM.
Requestor	Select to indicate the user will use an active license. Note: For Infor EAM Requestor users, 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 the user will use an active license.
Mobile	Select to indicate the user will use an active license.

- 4 Click **Save Record**.

Associating users with organizations

After setting up new system users, associate them with specific organizations and add their roles in the organizations.

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user with whom to associate the organization, and then click the **Organizations** tab.
- 3 Click **Add Organization**.

- 4 Specify this Organization Details information:

Organization

Specify the organization to associate with the user. The **Common** check box is automatically selected if the organization is a common organization.

User Group

Specify the user's assigned user group.

Role

Specify the user's role in this organization. If this user has more than one role in this organization, create a record for each role in the organization for the user.

Note: The ROLESECU install parameter must be turned ON to assign a role to the user for this organization.

- 5 Optionally, select the **Default** check box to indicate this organization is the default organization for this user. The default organization is automatically shown when the user logs in to EAM and on most forms that have an **Organization** lookup.

Note: A user can have only one default organization.

- 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.

- 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 will display on that user's Start Center inbox.

- 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**.

Associating users with responsibilities

Associate users with specific responsibilities to indicate the person should perform that particular work. An example of a user responsibility is reviewing a completed work order checklist.

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user for which to associate responsibilities, and then click the **Responsibilities** tab.
- 3 Click **Add Responsibility**.
- 4 Specify this information:
 - Responsibility**
Specify the task the user will be responsible for completing.
- 5 Click **Submit**.

Configuring advanced reporting options for users

Select consumer license or author license for the user if the user will use advanced reporting functionality.

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user record for which to configure advanced reporting options.
- 3 In the Advanced Reporting Options section, select the user's reporting option:

Consumer

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

Author

Select to indicate 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.

- 4 Click **Save Record**.

Changing passwords for users

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.

- 1 Open the appropriate .xml file, and then delete the encrypted password and the '{ENCR}' prefix.
- 2 Provide the new (unencrypted) password.
- 3 Redeploy the application.

Unlocking accounts for users

In EAM, a user's ID and password are locked when the maximum number of login attempts is reached. If you are a system administrator or other authorized user, unlock the user's account to restore access to the system.

Note: If you are a system administrator and would like to modify the maximum number of login attempts permitted, change the value of the SECUVIOL installation parameter.

As a rule, the **Unlock User** button is hidden until the user account is locked.

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user whose account is locked.
- 3 Click **Unlock User**. The user is unlocked and the **Unlock User** button is hidden.

Enabling accessibility mode for users

Enable any user in Infor EAM to work in accessibility mode. In accessibility mode, the application is entirely keyboard-navigable and screen reader friendly.

Note: Although the EAM application is supported by many different internet browsers, Infor strongly recommends using Internet Explorer 11 when navigating the application in accessibility mode.

- 1 Select **Administration > Security > User Setup**.
- 2 Select the user record you are enabling to work in accessibility mode. The **Record View** tab is opened.
- 3 Click the **Accessibility Mode** check box.
- 4 Click **Save Record**.

Note: Although these changes play a big role in achieving an accessible environment, when accessibility mode is enabled, a good portion of the changes that occur in the application are not immediately noticeable by the user. The DOM or Document Object Model for Infor EAM has been significantly altered. Each field, label, tab, and link has tags injected into the rendered DOM on the screen. This allows for screen readers such as JAWS to discern between different field states, types of fields, and other on-screen objects.

To view the shortcuts available in the screen reader, see the software vendor's website, e.g., if the screen reader is JAWS, consult the JAWS application website.

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.

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

Role

Specify a unique code identifying the role, and then provide a description of the role in the adjacent field.

User Group

Specify the user group to which users of the role are assigned.

Note: If you specified a Requestor user group in **User Group**, Infor EAM Requestor is automatically selected, and Infor EAM is automatically cleared.

Default Org.

Specify the default organization of the role.

Language

Select a default language for the role.

Success Msg. Timeout

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

First Screen

Specify the code identifying the default screen opened when users of the role log in to the application.

- 4 Optionally, select the **Infor EAM Mobile Administrator** check box if users of the role are administrators of Infor EAM Mobile Full VGA.
- 5 Optionally, select the **Buyer** check box if the user of the role can buy materials or services.
- 6 Optionally, select the **Screener** check box if the users of the role can screen work requests.
- 7 Optionally, in the Infor EAM Products sections, select which applications users of the role will access.

Note: If users of the role will be Requestor users, specify 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.

- 8 Optionally, in the Advanced Reporting Options section, select the user's role in the reporting process.
- 9 Optionally, in the Role Limits section, specify the maximum amounts users of the role can enter or approve for requisitions, invoices, non-purchase order invoices, purchase orders, and pick tickets.
- 10 Click **Save Record**.

Maintaining electronic records and signatures

You can 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. You can also 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 103.

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	Receipt (for status transactions)	Receipt and receipt lines
RETN	Returns	Return and return lines
STOS	Store to Store (for status transactions)	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
RFQ	Request for Quotations	
RFQR	Quotation	Quotations and lines
INRH	Inspection result header	
BORD	Blanket order	Blanket order and lines
INSP	Inspection results	Part inspection results
INV	Invoice	Invoice and lines
CAMP	Campaign	
PTW	Permit to Work	

Entity	Description	Information recorded
CASE	Case management	
STTK	Stocktake (for remembering codes)	
FTIC	Fleet tickets	
CHNO	Change notice	Change notices and lines
PREQ	Production request	

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.

Signature Required

Select to indicate that the status change requires a signature.

From Status

Specify the old status of the entity.

To Status

Specify 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.

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.

3 Change the status of the selected record, and then click **Save Record**.

4 Specify this information:

User ID

Specify the user ID.

Password

Specify the password associated with the user ID.

Signature Type

Specify the reason for the electronic signature, e.g., review, approval, etc. Define signature types for the ESTP entity on the **System Codes** form.

Certification Number

Specify the unique certification number for the eSignature.

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 pop-up window, 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 form is closed and changes are not recorded.

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.

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 102.

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**.

Managing GDPR records

Review and maintain records in compliance with Global Data Protection Regulations (GDPR). GDPR-related records will be processed nightly. Maintain the status of these records or delete them on this screen. Deleting the records on this screen, removes the record and prevents it from being processed permanently.

To manage a GDPR record:

- 1 Select **Administration > Security > GDPR Administration**.
- 2 View the records.
- 3 To modify the status of a record so that the record can be reprocessed, specify the new **Status**.
Note: Only records with a status of E (Error) can be modified, and these records can only be modified to S (Scheduled) status.
- 4 Click **Delete** to remove a record. Records deleted on this screen will be omitted from the nightly processing event.
Note: Records with a status of P (In Progress) cannot be deleted. Records with a status of S (Scheduled) or E (Error) that are deleted will not be processed. Records with a status of C (Completed) have already been processed.

Viewing GDPR record errors

View errors generated during the GDPR administration revocation process. Only GDPR records with status E (Error) will display on this tab.

To view a GDPR record errors:

- 1 Select **Administration > GDPR Administration**.
- 2 Select the GDPR record for which to view errors, and then click the **Errors** tab.
- 3 View the errors.

Enterprise data storage with Infor Data Lake

Infor Data Lake is a data repository that provides high-volume, scalable object storage for real-time data from across your enterprise systems, disparate applications, people, and IoT infrastructure. Using ION to connect your data sources, Infor applications move content into Infor Data Lake and use other consuming applications to query and navigate Infor Data Lake for content related to specific business cases.

What is a data lake?

A data lake is a centralized system or repository for storing data "as-is" across an enterprise. "As-is" data or raw data, can be stored structured, semi-structured, or unstructured, with or without hierarchy, or organization of the individual pieces of data. Additionally, data stored in a data lake, even in its rawest form, is available for reuse at any time. This versatility and flexibility allows a single data lake to meet all of an organization's data storage needs.

How can our organization use a data lake?

Data lakes are uniquely different from structured, highly organized relational databases in that the raw data stored without pre-defined schemas in a data lake can be utilized for an organization's purposes by applying schemas to data on-demand.

Among its numerous potential uses, many enterprises use data lakes as holding areas for information that isn't immediately needed, but that may bring future value. The data stored for future use may be archived in a data lake as per regulatory data-retention requirements. For example, organizations legally obligated to retain records for a specified, minimum amount of time, such as a financial institution or a hospital system may archive data in a data lake in compliance with appropriate laws.

Scheduling data extracts from EAM

Schedule data extracts from EAM to upload to Infor Data Lake.

- 1 Select **Administration > Data Lake > Data Lake Upload Setup**.

2 The **Schedule** tab is opened.

3 Click **New Record**.

4 Specify this information:

Schedule Name

Specify the name of the schedule for the data extract.

Schedule Description

Specify a description of the scheduled data extract.

Frequency

Specify how often the schedule will run in hourly, daily, weekly, monthly, or annual increments.

5 Click **Save Record**. A **Schedule ID** number is automatically assigned, and **Schedule Status** is set to **Waiting**.

Note: You cannot make updates to content selected for extraction, nor delete the content selected for extraction when the **Schedule Status** is **In Progress** or **In Queue**. All fields

Selecting tables for data extracts to Infor Data Lake

Select tables to include with data extracts from EAM to upload to Infor Data Lake.

1 Select **Administration > Data Lake > Data Lake Upload Setup**.

2 Select the schedule for which the tables will be included for data extracts from EAM to upload to Infor Data Lake.

3 Click the **Tables** tab.

Note: The List View shows tables previously selected for inclusion with scheduled data extracts.

4 Click **New Record**.

5 Specify this information:

Table

Specify the table to extract from EAM and upload to Data Lake.

Client Table Name

Specify the name by which the client refers to the table. The database table name is defaulted if not specified.

Schedule Order

Specify the numerical order in which the table will be uploaded to Data Lake for the schedule.

6 Optionally, click **Add/Edit Fields** to select fields to include with the tables during the data extraction. The Add/Edit Fields window is opened with the fields available for extraction.

7 Click **Submit**. After the process completes, the **Upload Status** field will indicate the success or failure of the upload.

Adding fields to tables scheduled for data extracts to Infor Data Lake

Select fields to include with the tables during the data extraction from EAM to Infor Data Lake.

- 1 Select **Administration > Data Lake > Data Lake Upload Setup**.
- 2 Select the schedule with which the tables will be included with data extracts from EAM to upload to Infor Data Lake.
- 3 Click the **Tables** tab.
- 4 Select the table for which to select fields, and then click **Add/Edit Fields**.
- 5 Click **Add Field**.
- 6 Specify this information:

Field

Specify the field to include with the table extraction.

Client Field Name

Specify the name by which the client refers to the field.

- 7 Optionally, select the **Timestamp Field** check box to indicate the field reflects the date and time the table record was last updated.
- 8 Click **Submit**.

Note: Timestamp Field is automatically added if you did not add the field when submitting the first field to extract for a table.

Chapter 3: Interface configuration

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.

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

Inbox Code

Specify a unique code identifying 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_LNO** 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 156.

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.

- 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.

4 Specify this KPI Details information:**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.

5 Specify this KPI Options information:**UOM**

Specify the unit of measure for the KPI.

Maintain History

Select to record the history of the KPI.

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.

6 Specify this KPI Hyperlink information:**Screen**

Specify the system screen for which to enable a hyperlink to call the screen for the KPI.

Note: If you update **Screen**, **Dataspy** is cleared.

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.

- 7 Specify this KPI Display Options information:

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**.

- 8 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 **INCRLLINO** 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 113.

- 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.

- 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.

- 1 Select **Administration > System Configuration > Configuration Manager**.
- 2 Select one of the following options for Delivery Method:

- **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 User Groups and Permissions 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.

4 Specify this General Setup information:

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.

5 Specify this Configuration information:**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.

6 Specify this Optional Setup information:**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.

- 7 Click **Export**.
- 8 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 3: Screen designer keyboard shortcuts

Function	Shortcut
Switch to screen designer mode	ALT+E
Save layout	CTRL+S

Function	Shortcut
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.

- 1 Display the selected page in designer mode.
- 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. Five field properties are used: Required, Protected, Optional, Hidden, and Not Available.

1 Display the selected page in designer mode.

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.

1 Display the selected page in designer mode.

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**, any default value that was previously defined for the field is cleared.

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.

- 1 Display the selected page in designer mode.
- 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.

- 1 Display the selected page in designer mode.
- 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 130.
- 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 pop-up window, such as **Create WO** on the **Assets** screen.

- 1 Display the selected page in designer mode.
- 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.

- 1 Display the selected page in designer mode.
- 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**.

Displaying screens in screen designer mode in the Field Work mobile application

Modify the page layout of screens and select panels on screens in the Field Work mobile application. In addition to modifying the layout of a screen-panel combination, you can also move fields around on the screens.

Note: Changes made to screens here will not affect the corresponding base screen in the EAM web application.

- 1 Open the **Screen Designer for Field Work** screen.

Note: This screen is not delivered in the default menu. Contact your system administrator for assistance showing menu items.

- 2 Specify this information:

Screen

Specify the screen for which to modify the layout on the mobile application.

Panel

Optionally, specify a panel on the selected screen for which to also modify the layout of the screen and the panel combined. Panels are available based on the screen specified. For example, on the PO Receipts screen, Active Lines is an available panel to modify.

Note: If no panel is selected, the record view of the selected screen will load.

Copy from Group

Select the user group from which to copy the screen layout.

Save to Group

Select the user group to which to save the screen layout.

- 3 Click **Load Layout** to view the available fields.
- 4 Optionally, select from the available fields, and then click the arrows to move the fields up or down on the specified screen in the Field Work mobile application.
- 5 Click **Save Record**.

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.

- 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 dataspy 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 pop-up window 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).

- 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**.

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.

- 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.
- 4 Specify this information:

Parent Grid Field

Specify the parent screen field for the parameter. For example, map the :WONUM parameter to the **WO No.** field 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.

- 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 clear the **Active** check box, the record is saved and the grid is made 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 name which will be used as a reference on user defined grids. All view names must begin with 05.

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.

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.

- 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

Specify the screen for which to define web services details.

Tab

Specify the tab to be specified for the selected screen.

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

Specify 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

Specify 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.

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.

- 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 populated.

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 blank.

Retrieved Field Type is not associated with the functionality available on the **Retrieved Values** page.

If a field is defined as check box, it appears as a check box 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 146.

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 140.

- 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**.

Chapter 4: Data collection

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.

- 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 clear 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**.

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**.

Chapter 5: GIS administration

This chapter provides installation requirements and procedures for integrating Infor EAM with GIS.

It includes 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 84 for information on granting access to the **GIS Map Search** page 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 the ArcGIS server platform.

Installation checklist

Follow this checklist to install the products:

Task	Reference
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 Support group.	Go to Infor Concierge at https://concierge.infor.com/ and create a support incident.
Install Infor EAM GIS extensions to integrate Infor EAM with Esri.	Installing or upgrading Infor EAM GIS extensions on page 160
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 <code>toolbar.bak</code> and <code>help.bak</code> directories in the original installation location.	Installing or upgrading Infor EAM GIS extensions on page 160

Installing or upgrading Infor EAM GIS extensions

Install or upgrade Infor EAM GIS extensions.

- 1 Choose the folder specific to your version of ArcGIS, and then execute the appropriate GIS version file.

Note: The naming convention of GIS toolbar executable follows this format: GIS<ArcMap version><EAMversion>WN<Year of release><Month of release>.

Example:

GIS toolbar on ArcMap 10.7.1 with EAM 11.5 in Windows environment released in 2019 year 11 month, would have this file name: GIS1071115WN201911.exe.

- 2 Click **Next**.
- 3 Select **I accept the terms of the license agreement** if you agree to the terms, and then click **Next**.
- 4 Verify that the required applications are installed, and then click **Next**.
- 5 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.

- 6 Select the extensions to install. Use 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 pop-up.
- **Events**
Select to install the Infor EAM Events pop-up.
- **Map Feature Attributes**
Select to install the Map Feature Attribute pop-up.
- **Synchronize Records**
Select to install the Synchronize Records pop-up.
- **Synchronize Attributes**
Select to install the Synchronize Attributes pop-up.
- **Data Filter**
Select to install the Data Filter pop-up.

- 7 Click **Next**.

- 8 Specify the directory in which to install the Infor EAM GIS extensions, and then click **Next**.
- 9 Review the settings information, and then click **Next**.
- 10 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 and 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 in Esri](#) on page 165.

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 EAM equipment in Esri](#) on page 168
- [Defining preferences for the creation of GIS features in EAM](#) on page 169

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 integration with the ArcGIS server.

Defining equipment for GIS features defined prior to integration

If you are integrating GIS and Infor EAM for the first time, move multiple GIS features to EAM through data collection.

Every GIS feature for which you create a corresponding EAM equipment record must have a `GISOBJID` number. The `GISOBJID` number links each GIS map feature to an equipment record in EAM.

Note: If you need to integrate a GIS feature with EAM that does not have a `GISOBJID` field for its layer, you must manually create the field. After you manually create the `GISOBJID` field for each layer you need to integrate with EAM, you should also:

- Manually enter a `GISOBJID` number for each feature within the layer. All `GISOBJID` numbers that you manually create must be less than 100,000,000 to avoid duplicate `GISOBJID` numbers with the `GISOBJID` numbers generated by EAM.
- Add the `UPDATE_COUNT` column to each layer's attribute table. The `UPDATE_COUNT` column is for tracking updates to the feature record for efficient attribute synchronization.

Creating `GISOBJID` fields for layers manually in 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.

The `GISOBJID` field is used to link each map feature to the EAM equipment.

- 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

Specify `GISOBJID`.

Note: Specify 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.

Data Type

Select `Long Integer`.

Note: Enter a precision of 9.

- 6 Click **OK**.

Creating UPDATE_COUNT columns in attribute tables for layers in Esri

Add the `UPDATE_COUNT` column to each layer's attribute table. The `UPDATE_COUNT` column is for tracking updates to the feature record for efficient attribute synchronization.

- 1 Open ArcMap to an existing map.
- 2 Select the layer for which to add the `UPDATE_COUNT` column.
- 3 Right-click the layer, and then choose **Open Attribute Table**.
- 4 Click **Options**, and then select **Add Field**.
- 5 Specify this information:

Name

Specify `UPDATE_COUNT`.

Note: Specify 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.

This field will not support any alias names. It should be `UPDATE_COUNT` for both field name and alias.

Data Type

Select **Integer** or **Short Integer**.

Note: Specify a precision of 0.

- 6 Click **OK**.

Configuring Esri's ArcMap

Configure Esri to best meet the specific needs of your company.

Configuring ArcMap for equipment creation in Esri

Configure ArcMap to allow the auto-creation of Infor EAM equipment records from within Esri's GIS.

- 1 Select **Tools > Extensions**.
- 2 Select **Infor EAM Create Asset Editor Extension**, and then click **Close**.

Modifying the GIS installation parameters in EAM

Modify the GIS installation parameters in Infor EAM before using GIS.

Note: To display GIS parameters only, select GIS in Dataspy.

- 1 Select **Administration > Security > Install Parameters**.
- 2 Set values for GIS parameters as necessary according to the tables listed in the Appendix [GIS installation parameters in EAM](#) on page 226.

Granting interface permissions for data filter grids in EAM

Users can filter EAM data within Esri using the Data Filter pop-up. Grant interface permissions to each of the filterable 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 EAM user information in 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.

1 Open ArcMap to an existing map.

2 Click **ArcEditor**.

3 Specify this information:

User

Specify 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

Specify the user's Infor EAM password.

Confirm Password

Re-enter the user's Infor EAM password.

Organization

Specify the organization under which the user logs in to Infor EAM.

Style

Select the style sheet to apply to Infor EAM pop-ups in ArcMap. The selected style sheet is applied to the pop-up immediately.

Note: Three style sheets are provided: 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 drop-down list for **Style**.

Infor EAM URL

Specify the URL address for the Infor EAM server to which ArcMap should connect, e.g, `http://<yourserver.yourcompany>/axis/...services/EWSConnector`.

Tenant

Specify 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\CONF\EWSUSER.XML`.

Defining field mappings for attributes in Esri

Define field mappings for attributes stored within 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 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. 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. 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 equipment record. The system creates an equipment record and automatically populates its description field with 156 Main Street because 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.

- 1 Open ArcMap to an existing map.

Note: The map must contain an integrated layer to access the [Map Feature Attributes](#) pop-up.

- 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 or 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 or 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 EAM equipment in 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 pop-up, 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.

- 1 Open ArcMap to an existing map.
- 2 Click **ArcEditor**.
- 3 Click the **Preferences** tab.
- 4 Specify this information:

Path To Preferences

Specify 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

Specify 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 in EAM

Define preferences for GIS features that you create from within EAM. When you define preferences, specify the equipment profile related to the layer in which you intend to create the new GIS feature. The default **Layer**, **Location X**, and **Location Y** are retrieved based on the preference.

Note: When creating features, attribute data is populated based on field mapping. If there is no mapping available for an attribute, the attribute data is populated based on the GIS profile.

Also specify how EAM retrieves data for the creation of GIS features.

There are three ways to populate data for the creation of GIS features from within EAM:

- 1 Auto-create
- 2 Prompt
- 3 Manual

Prompt

Note: Un-select **Auto-create** to specify the user group's preference as Prompt.

If you specify the preference for the creation of GIS features as Prompt, when users select a GIS profile when defining new Infor EAM equipment, the system displays the Create GIS Feature popup. The popup automatically displays the **Layer**, **Location X**, and **Location Y** based on the preference record for the profile. Users can edit this information as necessary. After users submit the information, the system generates a **GIS ID**.

Manual

If you do not link a profile and layer with a preference, users can manually define GIS features by clicking **Create GIS Feature** when defining new EAM equipment. Infor EAM displays the Create GIS Feature pop-up where users will enter the **Layer**, **Location X**, and **Location Y** for the creation of the GIS feature. After users submit the information, the system generates a **GIS ID** number.

- 1 Select **Administration > Security > User Groups**.
- 2 Click the **GIS Preferences** tab.
- 3 Click **Add Preference**.
- 4 Specify this information:

Profile

Specify the Infor EAM equipment profile that the system should use to create the GIS features.

Note: Profiles designated as GIS profiles are displayed.

Layer

Select the layer in which GIS features should appear.

Auto-create

Select if you want the system to automatically generate a **GIS ID** number and populate the default **Layer**, **Location X**, and **Location Y**.

Note: Deselect **Auto-create** to specify the user group's preference as Prompt.

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.

Location X

Specify the X coordinate for which GIS features should appear.

Location Y

Specify the Y coordinate for which GIS features should appear.

- 5** Click **Submit**.

Chapter 6: Fleet management configuration

This chapter provides procedures for configuring the fleet management module.

Fleet management references EMRS codes, previously called VMRS codes in the application.

Infor EAM has expanded the functionality to include all equipment. Within the application, V for Vehicle is now E for Equipment. If you reference ATA codes, these codes still exist in the Infor EAM application, but are now stored on the **EMRS Codes** screen.

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 174.

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.

- 1 Select **Work > Fleet > Fleet Configuration**.
- 2 Click the **Billing Schedules** tab.
- 3 Click **Add Billing Schedule**.
- 4 Specify this information:

Period End Date

Specify the date at which the billing period will end, e.g, 6/25/05.

Period Description

Specify a description of the billing period, e.g, June 2005.

Process Start Date

Specify 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

Specify 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 172.

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.

- 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 clear the **Maintenance** check box, the costs associated with work orders of the specified work order type will display as non-maintenance costs.

- 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.

- 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 not billed.

- 3 Specify this information:

New Cost Code

Specify a new cost code for every **Current Cost Code** that must be replaced.

Remove

Select to remove the record from the grid.

Note: To remove all of the transactions at once, select **Remove**. To clear all the line items at once, clear the **Remove** check box.

4 Click Replace.

Note: You must specify **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.

Chapter 7: Archiving management

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.

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
Quotations with Services for the WO
Purchase Orders with Direct Materials for WO Activities
Repair Parts

Archived Items

Calculated costs for the WO
Costs
Instruments (Calibration)
Standards (Calibration)
Systems (EMRS)
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

Archived Items

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.

Viewing comments for archived work order events

To view comments for archived work order events:

- 1 Select **Administration > Setup > Archived Events**.
- 2 Select the archived work order for which to view comments, and click the **Comments** tab.
- 3 View the comments.

Chapter 8: Basic module data creation

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 (INCRLINO)

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 (SECUVIOL)

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.

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.

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 (TRANSDISC)

Specify 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 (EVTSCASCD)

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**.

Chapter 9: Web service prompt execution

System administrators can create user-defined screens that utilize the underlying web services on which the system is architected.

The Web Service Prompt Engine displays the screen representing the prompt definition. The Web Service Prompt Engine also processes data entered for the prompt transactions through the underlying web services.

Because the Web Service Prompt Engine uses web services, the data is processed directly to the underlying tables as the transactions are submitted. Therefore, you receive immediate feedback if the transaction is successful as well as if it contains validation or web service errors. These errors can then be corrected in 'real time' and re-submitted.

Once a web service prompt has been created, the system administrator must place the corresponding screen into the user groups menu structure. That process makes the new screen available through the menu structure, and the new screen appears like all other screens within the system. The screen name is equivalent to the prompt description. You need only query permissions for the new screen.

Note: User defined fields are available for web service prompts. The fields display in a list of all fields under the appropriate web service. These user defined fields inherit properties from the associated reference form. Right-click in Screen Designer mode to define options for user defined fields.

The following apply to screens based on web service prompts:

Screens	Behavior/Expectations
The lookup defined on the selected screen for a chosen field	Is not automatically displayed
They are standalone record view screens	With no tabs and no Dataspy filtering features
Dataspy, Export to Excel, Quick Filter, and Save Layout	Options are not available
Common tabs and pop-ups	(Comments, Documents, Addresses, etc.) are not available
Available toolbar options	Previous Screen, Save, Reset Screen, and Help
Right-click options	Not available

Note: The system administrator must associate a Query Code or define a Retrieved Value for each lookup field unless the field is a user defined field with lookup definitions defined on the inherited screen.

Executing web service prompts

Submit one or more transactions using one or more web services to execute the web service prompts.

- 1 Create a web service prompt.
- 2 Associate the new web service prompt with a user group menu.
- 3 Select a **Web Service Prompt** screen. The screen is displayed in insert mode, based on the underlying web service prompt field defined. The Web Service Prompt description is displayed as the screen name.

Note:

- Each web service defined for the prompt is displayed in its own section.
 - Each section contains a header containing the name of the web service for which the section is based, such as AddWorkOrder, AddActivity, and DeletePart.
 - The prompt fields for each web service section header are displayed in ascending order by **Sequence**.
 - If a **Query Code** is defined for the prompt field, a lookup button for the field is displayed.
 - If the prompt field is Computed, the statement in **Computed Data** is used to populate the field value. These calculations are performed when the transaction is saved.
 - If the prompt field is a check box, a check box is displayed next to the **Field Label**.
 - If a **Pattern Match** is defined for a prompt field and you leave the field, the value entered in the field is guaranteed to match the defined pattern.
 - If **Use Previous Value** is selected for a prompt field and insert mode is entered, the field values from the previous record are automatically populated for any fields that have **Use Previous Value** checked on the web service prompt.
- 4 Specify values for the displayed prompt fields.
 - 5 Click **Save**. The specified data is submitted through the web services related to the prompt. Web Services are processed by the Web Service Prompt Engine in ascending order by **Process Group**.

Executing a web service prompt containing an 'update' web service

Execute a web service prompt containing an 'update' web service.

- 1 Create a web service prompt.
- 2 Associate the new web service prompt with a user group menu.
- 3 Select a **Web Service Prompt** screen. The screen is displayed in insert mode, based on the underlying web service prompt field defined. The Web Service Prompt description is displayed as the screen name.

Note: Key fields defined in the 'update' web service prompt are displayed. These fields are used to uniquely identify a database record. For example, if updating equipment, you must enter the equipment code and organization.

- 4 Specify the key field data. When you tab out of the last key field or click **Save**, the key field information is used to retrieve the field data defined in the 'update' prompt definition. The key fields are protected by the system.
- 5 Update other fields as necessary.
- 6 Click **Save**.

Executing a web service prompt containing a 'delete' web service

Execute a web service prompt containing a 'delete' web service.

- 1 Create a web service prompt.
- 2 Associate the new web service prompt with a user group menu.
- 3 Select a **Web Service Prompt** screen. The screen is displayed in insert mode, based on the underlying web service prompt field defined. The Web Service Prompt description is displayed as the screen name.
Note: Key fields defined in the 'delete' web service prompt are displayed. These fields are used to uniquely identify a database record. For example, if deleting equipment, you must enter the equipment code and organization.
- 4 Specify the key field data. When you tab out of the last key field or click **Save**, the key field information is used to identify the database record for deletion.
- 5 Click **Save**.

Appendix A: 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 14.

Barcode parameters

Barcoding is an add-on module for 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.

Code	Description	Fixed
BARCODEB	This code indicates the prefix of the barcode bin. Example: B	Yes
BARCODL	This code indicates the prefix of the barcode lot. Example: L	Yes
BARCODN	This code indicates the prefix of the serial number of the barcode equipment. Example: N	Yes
BARCODO	This code indicates the prefix of the barcode equipment. Example: O	Yes
BARCODEP	This code indicates the prefix of the barcode part. Example: P	Yes
BARCODS	This code indicates the prefix of the barcode store. Example: S	Yes
BARCODV	This code indicates the prefix of the barcode physical inventory. Example: V	Yes
BARCODW	This code indicates the prefix of barcode of work order and activity. Example: W	Yes
BARFILL	Single-character filler between a work order and activity bar code. Example: #	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.

See [Defining installation parameters](#) on page 14.

Code	Description	Fixed
\$BTRACE	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. Example: No	No
\$CATSF	Financial Parameter for Category code for type <code>SF</code> . Example: 1	No
\$CATSH	Financial Parameter for Category code for type <code>SH</code> . Example: 1	No
\$CATST	Financial Parameter for Category code for type <code>ST</code> . Example: 1	No
\$LTRCDIR	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. Example: F:\BAIMTRACE	No
\$REQNUM	Parameter for Requisition Number from Infor EAM to be sent to <code>APPS</code> . Example: YES	No
\$RTRCDIR	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 <code>\$RTRCDIR</code> 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. Example: F:\BAIMTRACE	No
\$SERVUOM	Unit of Measure for Service types to be sent to <code>APPS</code> . Example: EA	No
\$SFLTYPE	Financial Parameter for Line type for type <code>SF</code> . Example: 1	No
\$STLTYPE	Financial Parameter for Line type for type <code>SH</code> , <code>ST</code> . Example: 1	No
@ADDPO	This code indicates whether the Databridge Add PO (Outbound) transaction is activated. Example: Y	No

Code	Description	Fixed
@ADDREQ	This code indicates whether the Databridge Add Requisition transaction is activated. Example: Y	No
@CANPO	This code indicates whether the Databridge Cancel PO (Out-bound) transaction is activated. Example: Y	No
@CANPORD	This code indicates whether the Databridge Cancel requisition lines for Cancel PO (Inbound) transaction is activated. Example: N	No
@CANREQ	This code indicates whether the Databridge Cancel Requisition transaction is activated. Example: Y	No
@CHGPO	This code indicates whether the Databridge Change PO (Out-bound) transaction is activated. Example: Y	No
@CHGREQ	This code indicates whether the Databridge Change Requisition is activated. Example: Y	No
@CSMGMT	This code indicates whether the Databridge Case Management outbound event is activated. Example: N	
@DBPID	Databridge DUNS+4 partner ID. Example: 2	Yes
@DOCKREC	Indicates whether the Databridge ReceivePO transaction will support on-dock receipts. Set to Y to enable on-dock receipts for the ReceivePO transaction. Example: N	No
@HMSINT	Infor EAM is integrated with Infor HMS. Enter YES if integrated. Enter NO if not integrated. Example: NO	No
@INVREAP	Determines if Databridge will re-approve an approved invoice. If NO, the approved invoice will not be re-approved by Databridge, and no field except paid date is editable. If YES, Databridge will update and re-approve an approved invoice. This is default. Example: YES	No
@LDPAY	This code indicates whether the Databridge Load Payable (Out-bound) transaction is activated. Example: Y	No

Code	Description	Fixed
@MSGARCA	Determines if all messages get archived earlier than the archive cut-off date. Specify Y or N.	No
@NEWACT	This code indicates whether to automatically create an activity when <code>INFOREAM.ACT</code> tag is null. Example: N	No
@NEWPART	This code indicates whether to automatically create a new part when <code>ITEM</code> tag is null. Example: N	No
@NITMOUT	This code indicates whether the Databridge Sync Item (Outbound) transaction exports temporary parts. Example: N	No
@PORECV	This code indicates whether the Databridge Receive PO (Outbound) transaction is activated. Example: Y	No
@SECROLE	Determines if security role outbound is activated. Example: N	No
@STRBIN	Is Store bin outbound activated? Example: N	No
@SUPRMA	The Supplier RMA Outbound option determines whether the event is enabled. If Yes, when a supplier return is approved, Databridge generates an event. If No, Databridge will not generate an event. Example: N	No
@SYNCITM	This code indicates whether the Databridge Sync Item (Outbound) transaction is activated. Example: Y	No
@SYNCPRJ	This code indicates whether the Databridge Sync Proj Info (Outbound) transaction is activated. Example: Y	No
@SYNCRES	This code indicates whether the Databridge Sync Reservation transaction is activated. Example: Y	No
@SYNCWO	This code indicates whether the Databridge Sync Maint Order transaction is activated. Example: Y	No

Code	Description	Fixed
@UPDINV	This code indicates whether the Databridge Update Invy (Outbound) transaction is activated. Example: Y	No
@UPDPTM	This code indicates whether the Databridge Update person time (Outbound) transaction is activated. Example: Y	No
~QUEUES~	Number of concurrent queues. Example: 1	No
~SLEEP~	This code indicates the interval time (in seconds) for the BDRV driver. Example: 15	No
~SLEEPB0	This code indicates the interval time (in seconds) for BDRV queue 0. Example: 86400	No
~SLEEPT0	This code indicates the interval time (in seconds) for TDRV queue 0. Example: 3600	No
7IACDKEY	Infor EAM CD key. Example: 000-0000-00000-XXXX	No
7IBCDKEY	Infor EAM Barcode module CD key. Example: 000-0000-00000-0000	No
7ICCDKEY	Infor EAM Reports Consumer CD Key. Example: 000-0000-00000-XXXX	No
7IMCDKEY	Infor EAM Mobile CD key. Example: 000-0000-00000-000A	No
7IPCDKEY	Infor EAM Reports Author CD Key. Example: 000-0000-00000-XXXX	No
7IWCDKEY	Infor EAM Mobile CD key. Example: 000-0000-00000-000C	No
ACCOUNT	This code indicates whether accounting information is to be upgraded to use the DR/CR format (YES) or uses * for all accounts (NO). Example: YES	No

Code	Description	Fixed
ADVREPT	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. Example: YES	No
ALWUSRCR	Will allow or restrict the Just In Time User creation. Example: YES, NO	No
AMSGCOST	Indicates the maximum allowable SQL score for Alert Management grid Dataspies. Example: 250	No
APPLGWH	Specifies the width and height of the image displayed on the header of the application in <i>widthxheight</i> format. Example: 25x25	No
APPLOGO	Determines the image displayed on the header of the application. Specify the URL 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 APPLGWH. Example: http://google.com/image.gif	
APPNAME	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	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. Example: 2	No
ARCRC	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. Example: NO	No

Code	Description	Fixed
ASDEPTYP	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 Example: SL	No
AUTOANUM	This code indicates whether Infor EAM automatically generates asset numbers. Example: NO	-
AUTOKBNM	This code indicates whether the system auto-generates knowledge base article codes. Valid values are 'YES' and 'NO.' Example: NO	No
BIRSTPAS	Birst Password for Single User Environment	No
BIRSTSP	Birst Space ID for Birst Deployed Environment	No
BIRSTURL	Birst Server URL and Port	No
BIRSTUSR	Birst Users for Single User Environment	No
BRETRIES	Maximum number of retries in the BDRV driver. Example: 5	No
CASCADE	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. Example: YES	No
CAETYPE	Determines which external code type the application will extract from the client certificate, and store in r5users.usr_externcode (External User ID field on the Users screen in EAM). External code types: 1. Common Name (CN): extracted from Distinguished Subject Name 2. Electronic Data Interchange Personal Identifier (EDIPI): 10-digit number extracted from Common Name	CN, EDIPI
CALOGOUT	Determines the URL the user is directed to when certificate-based client authentication is used.	http://www.infor.com

Code	Description	Fixed
CCMNGLID	Specify an EAM user ID to be used by the application when accessing IDM. This is only used when accessing IDM is not the result of a direct EAM user action, such as the Service Request Portal. The EAM User ID and External User ID are populated based on the valid user ID specified here, and then used by the application to access IDM. Example: a valid EAM user ID	No
CDKEY	CD key code. Enter the number from the CD label in <code>MP5SET.S QL</code> when installing the Infor EAM Oracle database. Example: 000-00A0-00000-B0C0	No
CDKEYREQ	Infor EAM Requestor CD key code. Example: 000-00A0-00000-B0C0	No
CGMPONLY	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. 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. 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. Example: NO	No
CLNTAUTH	Determines if certificate based client authentication is enabled or disabled for the application.	No, Yes
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. Example: *	No
CSVDATEF	CSV Export date format. This is the java format of the date fields to be exported. Example: YYYY-MM-DD	No

Code	Description	Fixed
DBNAME	This code identifies your database, such as 'Production', 'Development' or 'TEST'. The install parameter also supports the use of four standard variables: MP5USER, :MP5DFLTORG, :MP5GROUP, and :MP5ORG. Example: Production	No
DEFCALLR	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	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. Example: EUR	No
DEFLANG	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. Example: FR	Yes
DEFORG	Default Organization value for entities with multi-organization security set to OFF. Example: *	Yes
DSSLTIME	The amount of time, in seconds, that will flag a Dataspy as slow. Once it is flagged as slow, the user will be warned each time they attempt to run the Dataspy. Leave blank to disable. Example: 60, 90	No
DOCCOMM	Controls the organization available for selection during the uploading of new documents. If set to ON, users can upload new documents to common organizations. If set to OFF, uploading new documents is restricted to specific organizations only. Note: This parameter does not affect the Profile Picture link button, the Documents screen, or web services through which common documents can still be uploaded. Example: ON, OFF	No
DOCOPEN	Set to YES to open documents in a new window when users view documents. Set to OFF to always download the document rather than view the document. Note: Browser settings may impact results. Example: ON, OFF	

Code	Description	Fixed
DOCOVRWR	Set to YES to allow previously uploaded documents to be updated. If set to YES, a copy of the overwritten document is not maintained. Set to NO to prevent overwriting previously uploaded documents. This parameter is not enforced when Infor Document Management (IDM) is in use.	
DUALCURR	Dual currency. <code>EUR</code> indicates whether to use the triangular conversion method to convert currency amounts to and from <code>EURO</code> currency. Example: EUR	No
ENXHOST	ENX Suite Host URL (e.g. <code>http://servername:8080/enxsuite</code>)	No
EPAKURL	URL path for the EPAK server. This path will be used to display EPAK content for Infor EAM. Example: <code>http://www.google.com/?what=yes</code>	No
ESIGMODE	Electronic signature mode: Set to U to default the User ID on the electronic signature popup. Set to B to require only one signature for a batch update of multiple records. Set to UB to default the User ID, and require only one signature for a batch update of multiple records. Leave blank to require the User ID to be manually entered, and to require a signature for each impacted record of a batch update. Example: UB	No
ESMONTHS	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. Example: 3	No
FAAMOD	Electronic signature mode: Set to ON for FAA which requires the Certificate Number and Certificate Type fields. Set to OFF for FDA which does not use the Certificate fields. Example: OFF	No
FLXAUDIT	This number determines the number of milliseconds after which the performance of Flex statements will be audited if the statement takes longer. Example: 999999	No
FRONTPG	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

Code	Description	Fixed
GDPROPTN	Set to ON to enable the Revoke option for Callers, Contacts, Employees, Supervisors and Users. Set to OFF to hide the Revoke option.	No
GRIDCOST	SQL score for Dataspies. Example: 100	No
HOSTED	This code indicates whether the installation is hosted.	Yes
HTMLCOMM	Set to ON to display the HTML editor bar on the Comments page. Set to OFF to hide the HTML editor bar. Example: OFF	No
HTMLKB	Set to on to enable HTML-editing capability on the Article Text field on Knowledge Base Articles. Set to off to disable HTML-editing capability. Example: ON, OFF	No
IDMSRVR	URL of the Infor Document Manager application server. Example: IDM URL(e.g. https://servername:8080/ca/)	No
IMSCKEY	Access Key/Consumer Key to be configured for IMS to be used for OAuth. Note: This value should never be null.	databridgeims
IMSSKEY	Secret key Value to be configured for IMS to be used for OAuth.	
INBXSCOR	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. Example: 100	No
INCRLINO	Increment value. Enter the value by which to increase the line number when automatic line numbering is activated. Example: 1	No
INSPCFV	Indicates whether to use the inspection type C, F, V in Infor EAM Mobile. Valid values are YES or NO. Example: NO	No
INSTCODE	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. Example: YD04O5VXVXY2	Yes
KEEPBOT	Keep boiler texts. A + value indicates Infor EAM will not overwrite user-adapted boiler texts when you upgrade the system. Example: +	No

Code	Description	Fixed
KPISCOR	SQL score for KPI queries. Example: 100	No
KPISLEEP	Enter, in days, how often the KPI driver (KDRV) checks for data to process. Must be a positive integer. Example: 1	No
LDAPPATH	Enables the LDAP server component for Infor EAM. Example: OFF	No
LDAPSERV	The URL identifying the location of the LDAP servlet. Example: http://myserver.mycompany.com: 8080/oc4jldap/LDAPAuth	No
LGNCON	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. Example: STD	No
LGNDDBR	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. Example: STD	No
LGNDISCL	Specifies the text displayed on the login page. This message can include html tags.	No
LGNEAM	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. Example: STD	No
LGNLOGOL	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

Code	Description	Fixed
LGNMOB	This code stores the login authentication method used for Infor EAM Mobile 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. Example: STD	No
LOCALE	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>ASIA</code>. Use the credential defined on user records within EAM. Example: NAMERICA	No
MAILRCAP	Define number of retries for failed e-mails and push notifications. Example: 3	No
MENUSECU	This code determines whether or not the user can hyperlink to hidden menu items. Turn OFF to allow hyperlinks to hidden menu items. Turn ON to prohibit hyperlinks to hidden menu items. Note: Regardless of this parameter setting, users are required to have screen permissions set for (access) to hyper linking to screens.	
MFACCLASS	Specify the full package Java class name of the customer implementation for multi-factor authentication. There is no default value.	No
MOBDOCUL	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>. Example: DATETIME	No
MOBGICIM	Specify the Permit to Work UDF field, text or number type, that will be used to store total number of customers impacted by a main isolation.	No
MOBGICVI	Specify the Permit to Work UDF field, text or number type, that will be used to store total customer volume interrupted by a main isolation.	No
MOBGIHIM	Specify the Permit to Work UDF field, text or number type, that will be used to store total number of hydrants impacted by a main isolation.	No

Code	Description	Fixed
MOBGIMLR	Specify the main layer name. These features can be isolated. The layer name should exist in the feature service specified by the MOBGMAP parameter.	No
MOBGIMTD	Specify the task plan whose Isolation Method check box is selected that will be used to create all permit to work records for main isolations.	No
MOBGIPMT	Specify the permit code that will be used as a template to create all permit to work records for main isolations.	No
MOBGIPSW	Specify the standard work order code used to create the parent, repair work order for a main isolation.	No
MOBGIVLR	Specify the valve layer name. These features will be operated to isolate mains. The layer name should exist in the feature service specified by the MOBGMAP parameter.	No
MOBORG	This code indicates the Infor EAM Mobile organization downloading mode. Set MOBORG to YES for multiple organization mode, or NO for single organization mode. Example: NO	No
MSRDWNCT	The maximum time, in Hours, before deleting a downloaded file generated by the Mobile Sync Request process from the server. Example: 6	No
MSRSTLCT	The maximum time, in Hours, before deleting a file generated by the Mobile Sync Request process from the server. Example: 24	No
MULTIFAC	Set to ON 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 OFF to hide the additional field and only require user name and password. Example: OFF	No
MULTIORG	This code indicates whether Multi-organization Security (MOS) is activated. You cannot turn off MOS. Example: YES	Yes
OMBARFMT	This code indicates whether a code and organization are separated with parentheses in Infor EAM Barcoding. Valid values are YES or NO . Example: NO	No

Code	Description	Fixed
OPENMENU	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. Example: H	No
OURCOMP	Customer name that appears on reports. Modify this code as necessary. Example: Your company	No
PASSMINL	Indicates the minimum number of characters allowed for a system password. Example: 6	No
PASSMAN	Indicates the minimum number of non-alphanumeric characters required for a password. Example: 0	No
PASSMNLR	Indicates the minimum number of lowercase characters required for a password. Example: 0	No
PASSMNNB	Indicates the minimum number of numerical characters required for a password. Example: 0	No
PASSMNUP	Indicates the minimum number of uppercase characters required for a password. Example: 0	No
PASSRSET	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. Example: YES	No
PASSSAID	Indicates whether the User ID can be used as their password. Valid values are YES or NO . Example: YES	No

Code	Description	Fixed
PASSUPER	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. Example: YES	No
PMFSNDEL	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 Canceled or Approved. Example: 30	No
PRMDSPLY	Indicates the number of Infor EAM Mobile prompts displayed. If set to SINGLE , the system displays Infor EAM Mobile Prompt in Single Field mode. If set to MULTIPLE , the system displays Infor EAM Mobile Prompt in Multiple Fields mode. Example: MULTIPLE	No
PMRVSIGN	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
PRODNAME	Name of the product installed. You can modify this code as necessary. Example: Infor EAM	No
PRODUCTS	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 Example: D7I	No
QUICKDEF	This code sets the default value for the Operator field on the Quick Filter portion of the Search Bar and DataSpies. Set QUICKDEF to B for Begins with and C for Contains. Applies to text fields only. Example: B	No

Code	Description	Fixed
REFRSHLV	Set to YES 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 NO to designate the system to not refresh the List View page. Example: YES	No
REPBATCH	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 . Example: NO	No
REPSERV	The name of the default Oracle report server. Do not use underscores (<code>_</code>) or numbers in the name. Example: rep78	No
REPSTOL	The amount of time in minutes a report is kept in cache for reuse. Example: 10	No
RMTMOUT	Time out setting for Infor EAM Mobile Real-time web service request, (in seconds). Example: 20	No
ROLESECU	Enables roles functionality. Set to OFF to turn off roles functionality. Set to ON to enable roles functionality, which allows the defining of roles along with a user and Organization to allow multiple user Groups per Organization.	
S3BKTPTH	Define the Amazon S3 bucket path to where documents will be stored. It should follow the following pattern: <code>[region]bucketname/path/to/shared/storage</code>	No
S3DBKPTH	Define the Amazon S3 bucket path for Databridge to where documents will be stored. It should follow the following pattern: <code>[region]bucketname/path/to/shared/storage</code>	No
S3PROF	Define Amazon S3 profile (access key information) for accessing S3 storage. Providing a value here will override the default profile.	No
S3STOR	Set to ON to use Amazon S3 for document storage instead of the Infor EAM server. Otherwise set to OFF . Example: OFF	No
S3STORDM	Set to ON to use Amazon S3 to store Databridge messages. Otherwise set to OFF . Example: OFF	No
SAFEWARN	Equipment safety warning for Infor EAM Mobile. See Infor EAM Mobile documentation. Example: NO	No

Code	Description	Fixed
SCNCACHL	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. Example: OFF	No
SDATE	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. Example: NO	Yes
SECUPWEP	Number of days in the password expiration period. You can change this value. Example: 30	No
SECUPWRP	Number of days before a user can reuse an expired password. You can change this value. Example: 180	No
SECUVIOL	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. Example: 5	No
SESINTVL	Must be set to support multiple application servers. The value specified for this parameter represents a number in minutes. If a session remains inactive for the number of minutes specified for this install parameter, the system will kill the session. 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. Also, if a value of less than 5 is specified, the system assumes a value of 5 minutes as the setting for the parameter. Example: 15	No
SHOWQUERY	This code indicates whether to show the query fields on grids by default. Set SHOWQUERY to YES to show the query fields on grids by default, or set to NO to hide the query fields on grids by default. Example: NO	No

Code	Description	Fixed
SPECJS	Set SPECJS to YES to use the tenant specified language js file. Set SPECJS to NO to use the common language js file. Example: NO	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	Identifies the custom web style sheet and associated images. Example: default	No
TABSAVE	Set TABSAVE to INSERT to return to Insert Mode after modifying a record on List/Detail tabs. Set TABSAVE to UPDATE to stay in Update Mode after modifying a record. Example: INSERT	No
TRANDESC	Transaction description. Changing the value does not affect existing data. Example: Transaction	No
UCOLANG	Language code of default user code. Do not change this setting once in use. Example: EN	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
WOBARFMT	This code indicates whether work order barcodes are printed in WO#ACT format. Valid values are YES or NO. Example: NO	No
WSGRIDSZ	This code indicates the maximum number of rows returned per block for web service grid. Example: 10000	No
XFRMOPTN	To set the X-FRAME-OPTIONS http header, 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. Example: Null (disabled)	No
XITENANT	Use the tenant to use when communicating to other Infor applications inside of Ming.le Xi. The value is typically set to "infor".	

GIS installation parameters in EAM

View and set values for GIS parameters as necessary according to the following tables.

Configuration parameters

Parameter	Description
GISBASEM	Determines the default ESRI base map that will be used when displaying maps. The REST endpoint specified in parameter GISSERV 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.
GISBATCH	Batch limit for Add and Sync GIS Webservices. Default is 1000.
GISIMGFM	Image format. Acceptable values are BMP, GIF, JPG (default), PNG, and PNG24.
GISSERV	The URL of the map service used to display maps in Infor EAM.
GISLRSMM	Specify if a second map can be displayed in the LRS map pop-up on the work orders screen. This parameter is only used when GISMAPS <> Global. Valid values are YES or NO.
GISLRSSL	Specify the LRS map segment layer name as seen at the REST endpoint specified in install parameter GISSERV. If segments are not maintained enter Not Applicable.
GISLRSWO	Specify whether linear equipment or underlying segments should be returned to the work order when using the LRS map pop-up on the work order screen. Valid values are Equipment or Segments.
GISSBTCL	Determines if the following temporary layers should be cleared when Select By map tool is used: sketches and Measurements. Note: Highlights and Selections temporary layers will always be cleared. ON will clear temporary layers. OFF will not clear temporary layers.
GISSBLR	Determines layers in which features will be selected when the Select By map tool is used. ON will only select features in the buffer layers chosen in the Search window. OFF will select features in all visible layers.
GISSYNCA	ON - ALL linked equipment records will be synchronized during attribute synchronization. OFF - Linked equipment records which are not in sync will be synchronized during attribute synchronization.

Parameter	Description
URLGIS	GIS map PDF directory. Specify <code>http://server_name/attachments/giswo/<tenant>/</code> . Use <code>http://server_name/attachments/giswo/default/</code> if no tenant exists. This value is used when displaying and printing map attachments of the work order.

Search-related parameters

Parameter	Description
GISABLC	Maximum number of advanced buffer layers allowed in an advanced search. The default is 3.
GISADDR	Address, or streets, layer name in the Image Service setup in the GISSERV install parameter.
GISEQUIP	Default equipment layer name.
GISGEOSV	Name of the geocoding service.
GISGMAXC	Specify the maximum number of geocoding match candidates. The default is 100.
GISGMIN	Specify the minimum geocoding score that should display in the Matching Addresses pop-up. 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 GIS-GEOSV entry.
GISINTRS	Specify the separator for searching for intersection addresses. The defaults are <code>&</code> , <code> </code> , and <code>@</code> . Values should be separated with a space. Note: When ArcGIS Server is being used and a geocoding process is established, this parameter is not used as this information is contained within the geocoding service described by parameter GIS-GEOSV. If geocoding is not being used with ArcGIS Server, this information is used 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.
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.

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 are: CIRCLE, CROSS, SQUARE, DIAMOND, or X. Default is CIRCLE.
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 ability to highlight a polygon using a transparent image is not supported.

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 are CIRCLE, CROSS, SQUARE, DIAMOND, or X. 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	Specify how boundary labels for linear equipment (referred to as 'routes' in GIS) should be displayed. Acceptable values are L, N, and A. The default is L. L to display boundary labels for the longest path (in the event of multiple route paths). N to display no boundary labels. A to display boundary labels for all paths (in the event of multiple route paths).

Text marker label parameters

Parameters	Description
GISTFNTC	Specify the font color of the text marker label.

Parameters	Description
GISTFNTS	Specify the font style of the text marker label by entering BOLD, BOLDITALIC, ITALIC, REGULAR, OUTLINE, or UNDERLINE. The default is BOLD.
GISTFNTZ	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.
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, or TRIANGLE.
GISTLPWD	Specify the width of the point used in the text label.

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 14.

Code	Description	Fixed
ANALOG	Analytics logging level. Valid values are: ERROR, WARN, INFO, or DEBUG.	No
ANALOGKP	Number of days to keep Analytics server log records. Example: 7	No
ANASYNKP	Number of days to keep Analytics synchronization records. Example: 180	No
AUTOSAVE	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. Example: YES	No
CANCSTAT	This code indicates the status used by Infor EAM when a work order is canceled. You can choose from any equivalent user statuses. Example: CANC	No

Code	Description	Fixed
DBBUFSIZ	Cache size for grid query results. Example: 500	No
DWLABOR	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
DWMATL	Indicates whether the data warehouse ETL driver will populate the Daily Material transactions data mart. Valid values are ON and OFF.	No
DWORDERS	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	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	Indicates whether the data warehouse ETL driver will populate the Daily Status Changes data mart. Valid values are ON and OFF.	No
DWWARNTY	Indicates whether the data warehouse ETL driver will populate the Warranty claims accumulating values data mart. Valid values are ON and OFF.	No
DWORK	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	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	This code indicates the status used by Infor EAM when a work request is rejected. You can choose from any equivalent user statuses. Example: REJ	No
REPCLEAN	Specifies how long in minutes that report temporary data will remain. Example: 240	No
REPORTMX	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. Example: 100	No

Code	Description	Fixed
REPPURGE	This code indicates the amount of time (in minutes) to keep an Infor EAM report output file on the server before deleting it. Example: 1440	No
RTIMEOUT	This code indicates the amount of time (in seconds) to wait for a report to finish executing before sending it to the report queue. Example: 120	No
SHOWLOT	Determines whether lots are used for stock information for parts in Infor EAM. The default setting for <code>SHOWLOT</code> is <code>Y</code>. If <code>SHOWLOT</code> is set to <code>N</code>, Extended disables the Lot field and it is hidden on forms.	No
SRQREP	This code indicates the number of days to search for similar requests. Infor EAM flags similar services requests that are repeated. Example: 5	No
WHSLEEP	This code indicates the time increment (in hours) between each data warehouse ETL procedure update. The default value is 24.	No
WHSTART	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
WSLSUPP	Contains a comma separated list of supported Language strings that are encrypted.	No
WTIMEOUT	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. 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. Example: 15	No

Materials parameters

Materials parameters are related to assets, inventory, and pricing features that must be set for the features in the application to work properly.

Set values for materials parameters according to the following table.

Code	Description	Fixed
ASSETASS	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	This code determines whether the system automatically updates the Parts Associated list. Update the Parts Associated list for approved lines on a receipt. If <code>AUTOPART</code> is set to <code>AUTO</code>, 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, 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.	No
AUTOPNUM	This code indicates whether the system automatically generates part numbers. Example: NO	No
AUTOSTOK	This code indicates whether the system automatically creates records in tables <code>R5STOCK</code> and <code>R5INSTOCK (+)</code> for data collection. Example: Yes	No
CHILDTXN	If the user issues or returns a Track by Asset part that has a Track by Asset child part, the system will create a record of the transaction for the child part based on the setting of CHILDTXN.	NO
DEFLDTIM	Default item lead time (in days) to use for calculation of Requisition Requested Before date and Purchase Order Due Date.	No
DEFSTOCK	This code indicates whether the stock management fields (e.g., reorder level, min/max, order level, etc.) should be copied from the highest-level parent store to the child store when a stock record is created in the child store. Example: YES	No

Code	Description	Fixed
DEFRQTP	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 line type is automatically defaulted to the specified user status. If DEFRQTP is null or if you enter an invalid value, the line type of requisitions is automatically defaulted to the system status of ^{PS} .	No
DEFUOM	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. Example: EA	No
DELTMATL	Delete materials list. Valid values are ^Y and ^N . ^Y implies that the system 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 the system will not remove the temporary material lists. Example: Y	No
ENABLEOS	URL for the OneSource server.	No
IPSUPP	Determines the value of the Part Org. when a new part is created via the iProcure interface. Set to ^H for the Part Org. to come from the Requisition or PO header. Set to ^S for the Part Org. to come from the Supplier. Set to ^C to use the common org specified in the IPSUPPC install parameter. Example: H	No
LOTNRG	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. Example: P	No
MOBSH WRV	Specify if mobile will do a blind receive of parts on the Active Lines for PO Receipt. Specify YES to show the expected Receipt Quantity. Specify NO to hide the Receipt Quantity.	No
OBSTCASC	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 , parent equipment status changes are cascaded to all children. If set to ^D , only parent equipment status changes are cascaded to dependent children.	No
OSTAXUSR	Value for the OneSource username.	No

Code	Description	Fixed
OSTAXPWD	Value for the OneSource Password. The user will key in the OneSource user password. The user will then click Save and the system will encrypt the entered value.	No
OVERRECV	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	This code indicates whether the system receives direct on-dock materials directly to stores or against a work order. Example: STORE	No
PICKONCE	This code indicates whether the system 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 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.	No
PLNDRQPO	This code indicates whether requisitions and unapproved purchase order totals are included in cost summaries for project reports. If the value is ON , then the system includes the cost of requisitions or unapproved purchase orders in the calculation of the total displayed in Planned throughout the system, as well as estimated work order costs that are not yet linked to a requisition or purchase order. If the value is OFF , the system does not include the cost of requisitions or unapproved purchase orders in the calculation of the total displayed in Planned throughout the system. The value for Planned is calculated based only on estimated work order costs. Purchase orders with Approved status are displayed in On Order throughout the system 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 . The system calculates Estimate to Complete for project costs based on the following formula: Current Estimate to Complete – (Planned + Actual)	No

Code	Description	Fixed
POSTALLR	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 canceled. 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. Note: If you have set the POSTALLR parameter, then the processing rules associated with the POSTALLR parameter overrides the rules for the POSTRECV parameter.	No
POSTRECV	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. 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. 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. Note: If you have set the POSTALLR parameter, then the processing rules associated with the POSTALLR parameter override the rules for the POSTRECV parameter. Example: A	No
PRICELEV	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 P and S. You cannot change this setting once in use.	Yes
PRICETIM	Pricing updates. This code determines when the system updates average unit price and last purchase price. Valid values are I (calculate new price at invoice approval) or R (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. If the price type of a stock record in the R5STOCK 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 I, Infor EAM calculates pricing updates again when you approve an invoice and/or credit/debit note. Note: This parameter is not fixed however Infor strongly discourages changing this setting. Example: R	No

Code	Description	Fixed
PRICETYP	This code determines the default value for Price Type when creating stores and indicates the manner in which the system prices storeroom materials at the store level. Valid values are A for Average price, FIFO for First in first out, L for Last price, LIFO for Last in first out, and S for Standard price. LIFO or FIFO pricing is a time-based pricing method; therefore, you should only set PRICETYP to FIFO or LIFO on the store record if you have selected to keep prices at store level. (See PRICELEV earlier in this section.) Note: This parameter is not fixed however Infor strongly discourages changing the price type setting because inconsistencies in data may occur. See the PRICETIM parameter. Example: A	No
PROJTRCK	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. 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. Example: ON	No
RECVAUTO	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. Example: YES	No
REQDESC	Default requisition description. Changing this value does not affect existing data. Example: Requisition	No
RPPRCAL	This code indicates whether price calculations should be performed when receiving internally repaired spare parts. Example: NO	No

Code	Description	Fixed
RQSTALLR	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 canceled 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 canceled, 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 canceled and none of the lines have been received, then the system does not consider the setting of this parameter.	No
RQSTRECV	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 ore 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 canceled and none of the lines have been received, then the system does not consider the setting of this parameter. Example: A	No
RRISSWAR	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. Example: YES	No

Code	Description	Fixed
RTNANY	The RTNANY 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. If RTNANY is set to YES, 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). If RTNANY is set to NO, 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. 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. For example, if RTNANY is set to NO 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 RTNANY parameter indicates whether you can return a greater quantity of a part than the original issue quantity of the part. If RTNANY is set to YES, you can return a greater quantity of a part than the original issue quantity. If RTNANY is set to NO, you cannot return a greater quantity of a part than the original issue quantity.	No
SHOWQTY	This code indicates whether to show the expected quantity for Infor EAM Mobile physical inventory. Example: NO	No
STTKDISC	Physical inventory discrepancies. This code indicates how the system 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. If the value is 1, the system ignores physical inventory discrepancies for parts tracked by asset. If the value is 2, the system ignores physical inventory discrepancies for parts tracked by asset, but prints the discrepancies on the sign-off document. If the value is 3, the system disables signing off stock-takes for parts tracked by asset.	No

Miscellaneous parameters

Miscellaneous parameters affect settings that are not specific to any module.

Set values for miscellaneous parameters according to the following table.

Code	Description	Example	Fixed
~ADRV~	Object audit control row	RUNNING 10 JUNE 2004 14:12	No
~BDRV0~	Batch interface error driver	RUNNING 10 JUNE 2004 14:12	No
~BDRV1~	Batch interface driver 1	RUNNING 10 JUNE 2004 14:12	No
~KDRV~	KPI scores	RUNNING 10 JUNE 2004 14:12	No
~MDRV~	Mail data driver	RUNNING 10 JUNE 2004 14:12	No
~TDRV0~	Tracking data error driver	RUNNING 10 JUNE 2004 14:12	No
~TDRV1~	Tracking data driver 1	RUNNING 10 JUNE 2004 14:12	No

Purchasing parameters

Purchasing parameters are related to purchasing and requisitions that must be set for the features of the application to work properly.

Set values for purchasing parameters according to the following table.

Code	Description	Fixed
CNVIPUOM	If enabled (ON), the system will look up the iProcure UOM in the EAM Alternate UOM table and uses the associated EAM UOM for that record to populate the UOM on the Part record. If the iProcure UOM is not defined as an Alternate UOM for any UOM in EAM, the system will use the value from iProcure.	OFF
DEFPOTP	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	Manual exchange rate update. Setting this parameter to YES will enable users to manually enter exchange rate fields.	No

Code	Description	Fixed
EXTCHG	Include adjusted charges in the base price. This code indicates whether the system automatically includes adjusted charges, such as a discount or an additional charge, when entering information on the Extra charges/Discounts dialog box. If the value is Y, the system automatically selects Include for all the items on the Extra charges/Discounts dialog box and does not allow you to clear it. If the value is N, the system automatically clears 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, the system automatically clears Include for all the items on the Extra charges/Discounts dialog box and enables you to select or clear it as necessary.	No
INCREDIT	Updates part price for stock for credit and debit notes. This code indicates how the system 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. If the Value is O, the system does not update part prices upon approval of a credit or debit note. If the Value is P, the system 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, the system 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. If you are using LIFO/FIFO as your pricing method, the system 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. If the value is F, the system 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.	Yes

Code	Description	Fixed
INVADAYS	This code indicates the number of days after completion that invoice allocations can be applied to a work order. Example: 60	No
INVALLOC	Set INVALLOC to YES to track unallocated invoice differences. Set INVALLOC to NO to apply all invoice differences to the stock record. Example: NO	No
INVDESC	Invoice description. Changing the value does not affect existing data. Example: Invoice	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	This code indicates whether the supplier's catalog will be updated upon approval of an invoice. Example: NO	No
IPSUPPC	Specify an existing common org that should be used as the Part Org when a new part is created via the iProcure interface. This value will only be used when the IPSUPP install parameter is set to C.	No
LIMITLEV	Limit level. This code indicates if the system 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	Automatic approval of matched invoices. This code indicates whether the system 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 YES, the system automatically assigns A, 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 NO, then all invoices must be manually approved.	No

Code	Description	Fixed
MATCHTOL	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 MATCHTOL installation parameter is no longer active, because users no longer enter a voucher total. Instead, the voucher total is now calculated based on the total invoice costs. Example: 0	No
POCURRE	This code indicates whether the system allows multi-currency order lines. Example: YES	No
PORDDESC	Purchase order description. Changing the value does not affect existing data. Example: Order	No
RCPTCURRE	This code indicates which exchange rate the system uses for receipt or return of goods. PO= exchange rate of purchase order; RCPT= the active exchange at time of receipt/return transaction approval. Example: PO	No

URL parameters

URL parameters designate locations and directories for schemas, servlets, documents, and other resources that must be set for many of the add-ons and features to work properly.

Set values for URL parameters according to the table.

Code	Description	Fixed
ADRDOCUP	Document upload path for Infor EAM Advanced Reporting Server. 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 http:// or file :// protocol. The path is necessary to add attachments of type "U" (upload) to the Work Order and Purchase Order reports.	No
DISCSCH	The schema connect string for Discoverer. Example: myoracleuser/ mypassword@ mydatabase	No

Code	Description	Fixed
DISCVURL	The URL of the Discoverer viewer. Example: <code>http://myserver.mycompany.com/discoverer/viewer</code>	No
OPIMGURL	This install parameter is the absolute URL of the directory where the OPS setup stores the images.	No
RPTDOCUP	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. Example: <code>http://mycompany.myserver.com/documents/PDFS</code>	No
SMTPSEND	Name of the mail sender, which is used in replying to messages. Example: <code>mailid@yourcompany.com</code>	No
SMTPSERV	SMTP mail server. Example: <code>mail.yourcompany.com</code>	No
WDCUPURL	The URL of the web data collection upload file servlet. Example: <code>http://myserver.mycompany.com/servlet/WscanUpload</code>	No

Work parameters

Work parameters are related to work orders, budgets, and project management features that must be set for the features of the application to work properly.

Work parameters are related to work orders, budgets, and project management features that must be set for the features of the application to work properly.

Set values for work parameters according to the following table.

Code	Description	Fixed
@WOPTDET	Whether to export work order part with more details in outbound MaintenanceOrder BOD. If set to Y , the BOD will detail items allocated for a work order by store and if the parts are planned, reserved, or direct purchase. If set to N , the BOD will summarize the parts for the work order.	No
7ISCDKEY	Infor EAM Caller Login for Service Requests CD key.	No

Code	Description	Fixed
AUTODMEC	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	This code indicates whether to automatically close all released minor PMs at release of the major PMs (YES/NO).	No
BOOKDATE	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 reported as is and still book hours for work that has already been completed.	No
BOOPLAN	Booking hours. Valid values are ON and OFF. When booking hours, if the value is ON, the system gets the trade rate from the activity on which hours are booked. If the value is OFF, the system 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	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	Cascade equipment Location changes to PM equipment records. If set to YES cascade changes. If set to NO , do not cascade changes.	No
CLPBWOST	This parameter identifies the work order status after checklist Performed By is signed. Example: WCOMP	No

Code	Description	Fixed
CLRBWOST	This parameter identifies the work order status after checklist Reviewed By is signed. Example: COMP	No
CLRRWOST	This parameter identifies the work order status after checklist Performed By is rejected. Example: INPR	No
COMDAYS	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. Example: 14	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. Example: *	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. Example: +	No
DSCHAVAI	Number of days from current date used to calculate labor availability in daily scheduling. Example: 7	No
DUPCHECK	If code is set to on , the system checks for duplicate and repeated service requests.	No
EVTCASCD	Event cascade. This code indicates whether changing a parent work order's status to Closed or Canceled causes the status of child work orders to also change. Example: N	No
INRVCTRL	This code indicates whether Revision control is activated for inspections. Example: NO	No
INSWOST	This code identifies the status used to create work orders from inspection forms. You can choose user codes equivalent to type R (Released). Example: L	No

Code	Description	Fixed
ISSDAYS	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. Example: 0	No
JTAUTH	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. Example: NO	No
NPRDAYS	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: This parameter may interfere with closed periods data. Changing the value will not affect existing data. Example: 14	No
PLANLEV	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.	No
PMNEST	Indicates whether to enable the following PM nesting enhancements. Valid values are YES or NO. - If YES is selected: - 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. - 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. - If NO is selected: - The system adjusts the due date forward for nested, more frequent work orders with a status of Bypassed whenever a work order is completed. - 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.	No

Code	Description	Fixed
PMCRPAST	This code indicates whether the system can generate new fixed PM or duplicate 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, the system 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, the system always creates the PM work order with a future due date.	No
PMRVCAPP	PM Revision Control. This code indicates whether you can create a new revision only from an approved revision. Example: NO	No
PMRVCDEP	PM Revision Control. This code indicates whether components of a PM depend on the PM itself. Example: NO	No
PMRVCRES	PM Revision Control. This code indicates whether users can approve lines only from their own departments. Example: YES	No
PMRVCTRL	PM Revision Control. This code indicates whether PM Revision Control is activated. Example: NO	No
PMWODATE	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. Example: C	No
PPMSTAT	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	This code identifies the status used to create work orders on the Project form. Example: L	No
REOPENPM	Reopen PMs. This code indicates whether a PM work order can be reopened. Example: NO	No
REQDAYS	Number of days after completing a work order that a requisition can be created against it. Example: -999	No

Code	Description	Fixed
RSPCOMP	Indicates whether to display the Qty. Completed on work orders for internally repaired repairable spare parts. If set to NO , the system does not display Qty. Completed . If set to YES , the system displays Qty. Completed and restricts internal repair receipts to completed repairs.	No
RTNDAYS	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. Example: 14	No
SCHPAST	Set to SCHPAST is set to YES to allow scheduling in the past. Set SCHPAST to NO to prevent scheduling in the past. Example: NO	No
SCHSTAT	The user status of a work order after you have scheduled an activity. You can select any status.	No
SHOWJOB	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	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	This code identifies the number of days to update tool usage costs after completion of a work order. Example: 3	No
UPWOMATL	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 is updated. If P , choose whether the work order planned parts list gets updated as lines are added to requisitions and POs. If A , the planned parts list is updated only after the line is approved.	No
VTAUTH	Determines whether the system uses vehicle ticket type authorization. Valid values are ON and OFF .	No

Code	Description	Fixed
WFFTAUTH	Comments code. The system 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
WOCLPOUT	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. Note: This parameter may affect purchase order generation if you allow work orders to be closed for which there are existing open requisitions.	No
WOQUAL	Qualification enforcement for work. Valid values are ON and OFF . When scheduling work, if the value is ON , the system 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. The system enables you to assign any employee with the necessary qualifications/training to perform the work. When scheduling work, if the value is OFF , the system does not check qualifications for work scheduling, and any authorized users can perform work regardless of any qualifications associated with work order activities.	No
WORKDAY	Work day hours. This code indicates the default number of hours in a working day. The system 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. Example: 8	No
WORKWOST	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. Example: L	No

Appendix B: 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 72.

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	' '		
DOCU-MURL	URL for the Documoto Server.	Free Text	Base	' '		
DOCU-MUSR	Value for the Documoto username.	Free Text	Base	' '		

Call Center options

See the following table for Call Center module options:

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
CASE CASC	Cascades the scheduled dates for case tasks automatically based on the previous tasks and tasks duration.	Code	Call Center	'-'	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	'-'	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	'-'	FOUND, NOT-FOUND, BLOCK	FOUND

Code	Description	Validation Type	Fixed	Valid Values	Default Value
GENEQ-MAX	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, 999999	100
GENEQWRN	Prevents the start of the equipment generation process when warnings still exist. If set to YES the system 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.	Code	'-'	YES, NO	NO
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	'-'	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	'-'	OFF, I, D, ID	OFF

Code	Description	Validation Type	Fixed	Valid Values	Default Value
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 clear the check box by default.	Code	' '	NO YES,	YES

Materials options

See the following table for Materials module options:

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
HELD-BINS	When receiving Direct Purchase material, set to OPTIONAL to make the Bin field optional. Set to PROTECTED to make the Bin field cleared and protected. Set to REQUIRED to make the Bin field required.	Code	Materials	' '	OPTIONAL, PROTECTED, REQUIRED	PROTECTED
IS-STOEMP	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	' '	YES, NO, KITS ONLY	NO
KITLDESC	Provide a default value for Kit Lot Description on Build Kit screen.	Free Text	Materials	' '		
KITP-PULD	IF YES, default Part Pulled check box to selected on the Build Kit screen. If NO, default the Part Pulled check box to unselected.	Code	Materials	' '	YES, NO	NO

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
LOTIEX-PL	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	'-'	YES, NO	YES
MANUS-RTN	Specify the user status of the Supplier Return that is automatically generated when a received part is approved with a return quantity entered. If blank or invalid the system will generate the return in approved status. If a valid user status (Entity DOST) with a system code of U, R, or A the system will generate the return with the designated status.	Free Text	Materials	'-'		
PDRCPT-TO	Determines if Direct Purchase materials are to be received directly to work order or to store (as held item). When receiving Direct Purchase material, set to WO to have the Direct to WO check box default to checked. Set to HELD to have the Direct to WO check box default to unchecked.	Code	Materials	'-'	WO, HELD	WO
PRCNT-CAT	Determines if a new supplier catalog record will be created for a part on a purchasing contract if such catalog record does not exist yet. If set to ON a record will be created immediately when the part is added to the contract. If set to APPR one or more records may be created when the contract is approved. If set to OFF no catalog records will be created.	Code	Materials	'-'	ON, OFF, APPR	ON

Code	Description	Validation Type	Module	Fixed	Valid Values	Default Value
RQDEF-SUP	Determines if the preferred supplier on the Stores tab of the Parts form is used to default the supplier on the Parts tab of the Requisitions form when manually creating a requisition. If set to STORE, the preferred supplier on the Stores tab of the Parts screen is used. If left blank, the preferred supplier on the Suppliers tab of the Parts form is used. If set to SUPPLIER, the preferred supplier on the Suppliers tab of the Parts form is used. The preferred supplier on the Stores tab of the Parts form will not be considered in this case. Note: If the supplier is specified on the header of the requisition, that value will always be defaulted to the Parts tab.	Code	Materials	' '	STORE, SUPPLIER	SUPPLIER
RQPO-STAT	Enable the user to generate a purchase order from the Generate PO button on the Requisition record view in a selected default user status. The parameter value can be any valid user status code for the entity DOST associated to a system code of U, R, or A. The user must have status authorization to create a purchase order from ' ' to the designated status.	Free Text	Materials			

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	' '	YES, NO	NO
POREVRSN	If YES, Revision Reason is required when creating a new revision of a PO.	Code	Purchasing	' '	YES, NO	NO

Work options

See this table for Work Management module options:

See this table for Work Management module options:

Code	Description	Validation Type	Fixed	Valid Values	Default Value
ACT-CALL	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	' '		
ACT-COMP	If set to ON when the status of the WO is Closed, all associated Activities are completed automatically. If set to OFF, activities must be completed manually.	Code	' '	ON, OFF	OFF
ACT-DISST	Define the user status for work order activity Assignment Status that will be populated when the work order activity is dispatched from the GIS Map WO Dispatching screen.	Work	' '		
ACTDIS-CP	Define one or more comma delimited user statuses for work order activity Assignment Status to indicate the dispatched work is complete.	Work	' '		

Code	Description	Validation Type	Fixed	Valid Values	Default Value
ACTOPREQ	Recalculate People Required every time Estimated Hours or the work order activity duration changes. If set to ON, Estimated Hours is recalculated and it is validated that Estimated Hours is less or equal to People Required * Duration * 24. If set to OFF, People Required is only recalculated if its is blank, and the validation will not be performed.	Code	' '	ON, OFF	ON
ACTC-SEND	Specifies that changes to the Scheduled Start Date and/or Scheduled End Date of the work order will impact the start and end dates of the activities as well. If set to ON, the work order activities are updated. If set to OFF, the activities are not updated.	Code	' '	ON, OFF	ON
AC-THINTL	Specify whether internal hours can be booked on an activity if Hired Labor is selected. If set to YES, internal labor hours can be booked. If set to NO, internal labor hours are not allowed.	Code	' '	YES, NO	NO
ACTINFO	Determines what is displayed inside the Activity drop-downs. 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	' '	TRADE, NOTE	TRADE
ACT-NOTE	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	' '	YES, NO	NO
ACT-SUPP	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	' '	YES, NO	NO
BKPLAU-TO	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	' '	YES, NO	NO

Code	Description	Validation Type	Fixed	Valid Values	Default Value
CCDUPL-CI	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 charge categories on the other contract and only asks the user if those overlap as well.	Code	' '	ON, OFF, WARNING, WARNING-CC	ON
CCFI-DAYS	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	' '	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, 999999	100
CHCKL-CPB	Determines if a check is performed that all required checklist items are entered or not applicable when signing Performed By. If set to ON, the check is performed. If set to OFF, the signature can be entered without this validation. If set to RESTRICTED, the system will behave as when set to ON, but will not allow using Notes to complete a required checklist item. The restricted setting also impacts the work order close, even if the Performed By signature is not required.	Code	' '	ON, OFF, RESTRICTED	OFF
CHCKL-FUP	Determines if follow-up activities are automatically generated when signing Reviewed By.	Code	' '	ON, OFF	OFF

Code	Description	Validation Type	Fixed	Valid Values	Default Value
CHCKL GBS	Determines how work order activities are grouped by schedule on the mobile Work Order Checklist screen. If set to REG, the system will use an overdue, due and future group. If set to WEEK, the system will split the month in week numbers where week 1 is day 1-7, week 2 is day 8-14, week 3 is day 15-21 and week 4 is day 22 through the end of the month, and will use these for grouping.	Code	' '	REG, WEEK	REG
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	' '	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	' '	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	' '	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 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.	Code	' '	P, S, B	P
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	' '	CPRQ, EMRS	CPRQ

Code	Description	Validation Type	Fixed	Valid Values	Default Value
DELWOS-ES	Determines the number of days after which auto-generated work order sessions will be deleted. Each time a session is created, the system will delete existing sessions older than the specified number of days.	Integer	'-'	1,999999	90
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	'-'	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	'-'	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, 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	'-'	YES, NO	YES
LOTOR-REV	Determines if anew 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	'-'	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 for equipment and locations. If set to NO, the system does nothing.	Code	'-'	YES, NO	NO

Code	Description	Validation Type	Fixed	Valid Values	Default Value
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	' '	C, H, B	C
MOB-WOCHK	This setting only applies to the WO Checklist screen in Mobile. Set to CHECKLIST to have the system open the WO Checklist Details screen when a WO is selected. Set to WO to open the regular Work Order screen when a WO is selected.	Code	' '	CHECKLIST, WO	CHECKLIST
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 re-inspection (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	' '	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	' '	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	' '	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	' '	YES, NO	NO

Code	Description	Validation Type	Fixed	Valid Values	Default Value
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	' '	DM, WO	WO
OCSTATUS	Specify the status of the operator checklist when the Move to Complete button is clicked, and no records exist on the Operator checklist tab of <u>Screens Setup</u> page. Possible values for the OPST entity are: C for Complete; R for Review; and U for Unfinished.	Code	' '	C, R, U	C
OPCKL-FUP	Determines if follow-up activities are automatically generated when signing Reviewed By .	Code	' '	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	' '	P, N, OFF	N
PERM-CLEA	Determines if permits are cleaned up 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	' '	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	' '	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, 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	' '	YES, NO	YES

Code	Description	Validation Type	Fixed	Valid Values	Default Value
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	' '	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 schedules, and standard work orders. If set to NO, the system does nothing.	Code	' '	YES, NO	NO
PML-STMTR	PMLSTMTR is applicable only for WOs with System Event Type = PPM Set to NEW to update the Last Meter Reading field on Work Order to the most recent reading when WO Status is changed to a new system status of 'C'. Set to INITIAL to update when WO Status is changed from a system status that is not 'C' to a system status of 'C'. Set to OFF to prevent update on status change	Code	' '	OFF,INITIAL, NEW	OFF
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	' '	YES, NO	YES
PTWCONFL	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 for which 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	' '	MANUAL, SYNC	SYNC

Code	Description	Validation Type	Fixed	Valid Values	Default Value
PTWEXPIR	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 canceled expires.	Code	' '	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	' '	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	' '	YES, NO	NO
PTWUPDO	Determines if the LOTO tab of the permit to work can be updated after approval. If set to YES, LOTO tab can be updated unless the permit to work is canceled or closed. If set to NO, the LOTO tab can only be updated if the permit to work is unfinished.	Code	' '	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	' '	YES, NO	YES
ROUTEEOB	If Y, the system creates multiple equipment child (MEC) type work orders for each route equipment when route based PM work orders are released. They will be related to the parent job.	Code	' '	Y, N	N
SAFERFRQ	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, 999999	365
SAFERREQ	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	' '	YES, NO	YES

Code	Description	Validation Type	Fixed	Valid Values	Default Value
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	' '	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	' '	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	' '	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	' '	ROUTE, SEGMENT	ROUTE
WOBKMDN	Determines if booking hours across midnight is allowed. If set to YES, two booked labor records are created. If set to NO, an error message displays stating booking hours across midnight is not allowed.	Code	' '	YES, NO	NO
WOBLCORR	Determines if book labor corrections can be made directly on the screen or only via the dedicated Book Labor Correction popup. If set to ON, the popup must be used for all book labor corrections. If set to OFF, the system will allow the entry of negative hours directly on the screen and will not require the popup.	Code	' '	ON, OFF	OFF

Code	Description	Validation Type	Fixed	Valid Values	Default Value
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	' '	YES, NO, WARNING	NO
WOEQD FLT	Determines if equipment changes on the work order will default equipment related data. If set to YES, the equipment change overwrites values already entered on the work order from the selected equipment. If set to NO, the system does not default any values from the equipment. Note: This option only handles equipment changes. If the equipment field is still blank before the equipment value is entered, values will always be defaulted, as if the option is set to YES.	Code	' '	YES, NO	YES
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	' '	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	' '	YES, NO	NO
WOL- STMTR	Set to NEW to update the Last Meter Reading field on Work Order to the most recent reading when WO Status is changed to a new system status of 'C'. Set to INITIAL to update when WO Status is changed from a system status that is not 'C' to a system status of 'C'. Set to OFF to prevent update on status change.	Code	' '	OFF, INITIAL, NEW	OFF

Code	Description	Validation Type	Fixed	Valid Values	Default Value
WOQC STAT	Specify a work order user status with a system status of R or C. The New Status on the Work Order Quick Close screen is automatically set to this value.	Free Text	' '	R, C	C
WORK- WOST	Determines the default user status assigned to preventive maintenance (PM) and maintenance pattern (MP) work orders when they are released. This user status becomes associated to the system status of Released .	Free Text	' '		

Appendix 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:

Screen	Default navigation
Administration Setup	Administration > Administration Setup
Advanced Reports Author	Administration > Advanced Reports Author
Alert Management	Administration > System Configuration > Alert Management
Archive Records	Administration > Setup > Archive Records
Associate Custom Fields	Administration > Custom Fields > Associate Custom Fields
Audit Setup	Administration > Security > Audit Setup
Chart Setup	Administration > Start Center Setup > Chart Setup
Classes	Administration > Setup > Classes
Closing Periods	Administration > Security > Closing Periods
Configuration Manager	Administration > System Configuration > Configuration Manager

Screen	Default navigation
Cost Codes	Administration > Setup > Cost Codes
Custom Fields	Administration > Custom Fields > Custom Fields
Customer Login	Start > Programs > Internet Explorer > Enter the URL provided by your system administrator > Customer Login
Customer Request	Note: This screen can only be accessed by using the Customer Request Login screen.
DC Transaction Prompts	Administration > Data Collection > DC Transaction Prompts
Data Lake Upload Setup	Administration > Data Lake Upload Setup
Documents	Administration > Setup > Documents
E-mail Notification Setup	Administration > E-mail Messenger > E-mail Notification Setup
E-mail Templates	Administration > E-mail Messenger > E-mail Templates
E-mail Viewer	Administration > E-mail Messenger > E-mail Viewer
Enterprise Search Setup	Administration > Enterprise Search Setup > Enterprise Search Setup
Equipment Setup	Administration > Equipment Setup
eRecords Setup	Administration > Security > eRecords Setup
Export Configuration	Administration > System Configuration > Export Configuration
Extensible Framework	Administration > Screen Configuration > Extensible Framework
Flex Business Rules	Administration > Screen Configuration > Flex Business Rules
GDPR Administration	Administration > Security > QR Codes Setup
Generate Enterprise Search Definitions	Administration > Enterprise Search Setup > Generate Enterprise Search Definitions
GL Process Schedules	Administration > GL Process Schedules
Global Text Changes	Administration > Screen Configuration > Global Text Changes
Grid Designer	Administration > Screen Configuration > Grid Designer
Import Configuration	Administration > System Configuration > Import Configuration
Inbox Setup	Administration > Start Center Setup > Inbox Setup
Install Parameter Setup	Administration > Security > Install Parameter Setup
Install Parameters	Administration > Security > Install Parameters
Job Setup	Administration > Data Collection > Job Setup
KPI Setup	Administration > Start Center Setup > KPI Setup
Languages	Administration > System Configuration > Languages
Locales	Administration > System Configuration > Locales
Materials Setup	Administration > Materials Setup
Menu Structure and Permissions	Administration > Overview > Menu Structure and Permissions
Mobile Devices	Administration > System Configuration > Mobile Devices
Mobile Setup	Administration > Mobile Setup
Monitor Interface	Administration > Data Collection > Monitor Interface

Screen	Default navigation
Multi-org Security	Administration > Security > Multi-org Security
My Account	Main header drop-down on the left-hand pane
My Service Requests	Note: This screen can only be accessed by using the Service Request Login screen.
Organizations	Administration > Security > Organizations
Printers	Administration > System Configuration > Printers
Prompt Machine	Administration > Data Collection > Prompt Machine
Purchasing Setup	Administration > Purchasing Setup
Queries	Administration > Start Center Setup > Queries
QR Codes Setup	Administration > QR Codes Setup
Regions	Administration > Setup > Regions
Report Organization Structure	Administration > Setup > Report Organization Structure
Reports	Administration > Setup > Reports
Roles Setup	Administration > Security > Roles Setup
Screen Setup	Administration > Screen Configuration > Screen Setup
Screens	Administration > Screen Configuration > Screens
Start Center Setup	Administration > Start Center Setup
Status Authorizations	Administration > Security > Status Authorizations
System Codes	Administration > Setup > System Codes
User Defined Screens	Administration > Screen Configuration > User Defined Screens
User Groups	Administration > Security > User Groups
User Setup	Administration > Security > User Setup
View Log Files	Administration > System Configuration > View Log Files
Views	Administration > Screen Configuration > Views
Web Service Prompts	Administration > Screen Configuration > Web Service Prompts
Work Setup	Administration > Work Setup

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 > Additional Features > Asset Inventory	Parameters, Inventory Results

Screen	Default navigation	Tab or pop-up name
Assets	Equipment > Assets	Actual Consumption, Addresses, Calibration, Depreciation, Capacities, Costs, Design Consumption, Energy Star Ratings, Events, Fuel Costs, Linear Condition, Linear Overview, Linear References, Linear Where Used, LOTO, Keys, Material Usage, Meters, Nonconformities, Nonconformities Analysis, OEE Metrics, Open Repairs, Open Work Orders, Parts Associated, Permits, PM Schedules, Purchase Orders, Rankings, Ranking History Chart, 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 Equipment Ranking Values	Equipment > Process > Batch Update Reliability Ranking Values	Reliability Survey, Equipment, Equipment Classes
Categories	Equipment > Setup > Categories	Calibration, Parts Associated, Permits, Safety, Test Points
Change Notices	Equipment > Additional Features > Change Notices	Lines, Assets, Locations, Addresses, Parts Associated
Child Equipment Replacement	Equipment > Process > Child Equipment Replacement	Not applicable (Stand-alone)
Closing Codes	Equipment > Setup > Closing Codes	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	Not applicable
Decay Curves	Equipment > Equipment Ranking > Decay Curves	Curve Points, Curve Chart, Translations, Markov Transition Matrix
Departments	Equipment > Setup > Departments	Addresses, 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 Class Definitions	Equipment > Equipment Ranking > Equipment Class Definition	Capacities, Cost Types, Service Life Usages

Screen	Default navigation	Tab or pop-up name
Equipment Configurations	Equipment > Equipment Configuration > Equipment Configurations	Configurations Associated, Structure, PM Schedules, Where Used, Calibration, Depreciation, Maintenance Patterns, Meters, Parts Associated, Permits, Safety, Test Points, Warranties
Equipment Evaluations	Equipment > Additional Features > Equipment Evaluations	Equipment Equivalency, Cost Analysis
Equipment Generation	Equipment > Equipment Configuration > Equipment Generation	Details, Preview
Equipment Operational Status	Equipment > Additional Features > Equipment Operational Status	Work Orders
GIS Map Search	Equipment > GIS Map Search	Not applicable
Key Management	Equipment > Additional Features > Key Management	Locks, Transactions, Ring Keys
Linear Direction Setup	Equipment > Linear Direction Setup	Not applicable
Locations	Equipment > Setup > Locations	Events, Costs, Structure, Structure Details, Addresses, LOTO, Material Usage, Meters, Nonconformities, Operator Checklists, Open Work Orders, Parts Associated, Permits, RCM, Safety, Service Codes, Service Delivery Matrix, Suppliers, Supplier Service Codes
Maps	Equipment > Maps	Parameters
Meters	Equipment > Setup > Meters	
Nonconformities	Equipment > Additional Features > Nonconformities > Nonconformities	Translations, Observations
Nonconformity Observations	Equipment > Additional Features > Nonconformities > Nonconformity Observations	Checklist
Nonconformities Setup	Equipment > Additional Features > Nonconformities > Nonconformities Setup	Status Dependencies
Nonconformity Types	Equipment > Additional Features > Nonconformities > Nonconformity Types	Translations, Parts, EMRS, Material Types
Notebook	Equipment > Notebook	References, Emails
Objectives	Equipment > Additional Features > Asset Management Policy > Objectives	Energy Targets, CPRs (Plans), Translations, Ranking Survey
Operational Status	Equipment > Operational Status	Work Orders
Performance Formulas	Equipment > Additional Features > Performance Formulas	Not applicable
Policies	Equipment > Additional Features > Asset Management Policy > Policies	Ranking Survey, Strategies, Translations

Screen	Default navigation	Tab or pop-up name
Positions	Equipment > Positions	Actual Consumption, Addresses, Calibration, Capacities, Costs, Depreciation, Design Consumption, Energy Star Ratings, Energy Star Ratings Chart, Events, Fuel Costs, Keys, LOTO, Linear Condition, Linear Overview, Linear References, Linear Where Used, Material Usage, Meters, Nonconformities, Nonconformities Analysis, OEE Metrics, Operator Checklists, Open Work Orders, Parts Associated, Permits, PM Repair Costs Chart, PM Schedules, Purchase Orders Rankings, Ranking History Chart, 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
Profiles	Equipment > Setup > Profiles	Parts Associated, Permits
Reliability Ranking	Equipment > Setup > Reliability Ranking	Decision Tree, Ranks, Equipment
Reservation Calendar	Equipment > Additional Features > Reservation Calendar	Not applicable
Risk Matrix Setup	Equipment > Setup > Risk Matrix Setup	Consequences, Consequence Cost
Sets/Consists	Equipment > Sets/Consists	Equipment
Strategies	Equipment > Additional Features > Asset Management Policy > Strategies	Objectives, Ranking Survey, Structure, Translations

Screen	Default navigation	Tab or pop-up name
Systems	Equipment > Systems	Actual Consumption, Addresses, Calibration, Capacities, Costs, Depreciation, Design Consumption, Energy Star Ratings, Energy Star Ratings Chart, Events, Fuel Costs, LOTO, Linear Condition, Linear Overview, Linear References, Linear Where Used, Keys, Material Usage, Meters, Nonconformities, Nonconformities Analysis, OEE Metrics, Open Work Orders, Operator Checklists, Parts Associated, Permits, Purchase Orders, Rankings, PM Repair Costs Chart, PM Schedules, Ranking History Chart, Ranking Survey, RCM, 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
Warranties	Equipment > Warranty > Warranties	Equipment, Parts, Components, EMRS Codes, Warranty Claim vs. Settlement Chart
Warranty Claims	Equipment > Warranty > Warranty Claims	Activities, Claim Lines, Addresses
Workspaces	Equipment > Additional Features > Workspaces	Employees, Equipment, Furnishings, Translations
Workspace Moves	Equipment > Additional Features > Workspace Moves	Translations, Associations

Materials menu

This table shows the default navigation path for the Materials menu screens:

Screen	Default navigation
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.
Breakup Kit	Materials > Kits > Breakup Kit
Build Kit	Materials > Kits > Build Kit
Calculate EOQ	Materials > Process > Calculate EOQ
Commodities	Materials > Setup > Commodities
Create Requisition	Materials > Create Requisition
Currencies	Materials > Setup > Currencies

Screen	Default navigation
Greenhouse Gases	Materials > Setup > Greenhouse Gases
Generate ABC Analysis	Materials > Process > Generate ABC Analysis
Generate Requisitions	Materials > Process > Generate Requisitions
Held Items Transfer	Materials > Held Items Management > Held Items Transfer
Held Items to Stock Transfer	Materials > Held Items Management > Held Items to Stock Transfer
Internal Repair Receipts	Materials > Transactions > Internal Repair Receipts
iProcure Vendors	Materials > Setup > iProcure Vendors
Issue/Return Parts	Materials > Transactions > Issue/Return Parts
Lots	Materials > Setup > Lots
Manufacturer Part Numbers	Materials > Overview > Manufacturer Part Numbers
Manufacturers	Materials > Setup > Manufacturers
Non-PO Receipts	Materials > Transactions > Non-PO Receipts
Packages	Materials > Held Items Management > Packages
Part Condition Templates	Materials > Setup > Part Condition Templates
Part Hierarchy Codes	Materials > Setup > Part Hierarchy Codes
Part Inspections	Materials > Transactions > Part Inspections
Part Number History	Materials > Overview > Part Number History
Part Reservations	Materials > Overview > Part Reservations
Part Requisitions	Materials > Part Requisitions
Part Warranty Claims	Materials > Part Warranty Claims
Parts	Materials > Parts
Physical Inventory	Materials > Transactions > Physical Inventory
Pick Tickets	Materials > Pick Tickets
PO Receipts	Materials > Transactions > PO Receipts
Quick Store-to-Store Transfer	Materials > Transactions > Quick Store-to-Store Transfer
Reasons for Return	Materials > Setup > Reasons for Return
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.
Requisitions	Materials > Requisitions
Review/Approve Requisitions	Materials > Review/Approve Requisitions
Stock to Held Items Transfer	Materials > Held Items Management > Stock to Held Items Transfer
Store Groups	Materials > Setup > Store Groups
Store-to-Store Issues	Materials > Transactions > Store-to-Store Issues
Store-to-Store Receipts	Materials > Transactions > Store-to-Store Receipts
Store-to-Store Requisitions	Materials > Store-to-Store Requisitions

Screen	Default navigation
Stores	Materials > Setup > Stores
Supplier Part Numbers	Materials > Overview > Supplier Part Numbers
Supplier Returns	Materials > Transactions > Supplier Returns
Suppliers	Materials > Setup > Suppliers
Tax Codes	Materials > Setup > Tax Codes
Tax Rate Types	Materials > Setup > Tax Rate Types
Tax Rates	Materials > Setup > Tax Rates
Units of Measure	Materials > Setup > Units of Measure
View Requisitions	Materials > View Requisitions

Operations menu

This table shows the default navigation path for the Operations menu screens:

Screen	Default navigation
Analytics Variable Setup	Operations > Analytics Variable Setup
Budget Calendar Types	Operations > Budgets > Budget Calendar Types
Budget Groups	Operations > Budgets > Budget Groups
Budget Structures	Operations > Budgets > Budget Structures
Budget Terms	Operations > Budgets > Budget Terms
Budgets	Operations > Budgets > Budgets
Bulletin Board Notices	Operations > Setup > Bulletin Board Notices
Calendar Groups	Operations > Setup > Calendar Groups
Call Center	Operations > Call Center
Call Center Setup	Operations > Setup > Call Center Setup
Case Management	Operations > Case Management
Case Management Tasks	Operations > Case Management Tasks
Contact Information	Operations > Setup > Contact Information
Customer Surveys	Operations > Setup > Customer Surveys
Data Warehouse Run Log	Operations > Data Warehouse Run Log
Data Warehouse Run Parameters	Operations > Data Warehouse Run Parameters
Event Log Type Filter	Operations > Setup > Event Log Type Filter
Knowledge Base Articles	Operations > Setup > Knowledge Base Articles
Overview	Operations > Overview
Providers	Operations > Setup > Providers

Screen	Default navigation
Service Categories	Operations > Setup > Service Categories
Service Codes	Operations > Setup > Service Codes

Purchasing menu

This table shows the default navigation path for the Purchasing menu screens:

Screen	Default navigation
Assets for PO	Purchasing > Assets for PO
Blanket Orders	Purchasing > Blanket Orders
Clauses of Contract Classes	Purchasing > Contracts > Clauses of Contract Classes
Credit Cards	Purchasing > Setup > Credit Cards
Delivery Addresses	Purchasing > Setup > Delivery Addresses
Generate POs	Purchasing > Process > Generate POs
Invoice Allocations	Purchasing > Invoice Allocations
Invoice Lines per Buyer	Purchasing > Overview > Invoice Lines per Buyer
Invoice Vouchers	Purchasing > Invoice Vouchers
PO Revision History	Purchasing > PO Revision History
PO Terms	Purchasing > Setup > PO Terms
PO Update	Purchasing > Process > PO Update
Purchase Orders	Purchasing > Purchase Orders
Purchasing Clauses	Purchasing > Setup > Purchasing Clauses
Purchasing Contracts	Purchasing > Contracts > Purchasing Contracts
Purchasing Contract Text	Purchasing > Contracts > Purchasing Contract Text
Quotations	Purchasing > Quotes > Quotations
Requests for Quotations	Purchasing > Quotes > Requests for Quotations

Work menu

This table shows the default navigation path for the Work menu screens:

Screen	Default navigation
Adjustments	Work > Customer Contracts > Adjustments

Screen	Default navigation
Advanced Maintenance Planning Configuration	Work > Additional Features > Advanced Maintenance Planning Configuration
AMS-Approve Customer Charges	Work > Additional Features > Asset Management Services > AMS-Approve Customer Charges
AMS-Customer Contracts	Work > Additional Features > Asset Management Services > AMS-Customer Contracts
AMS-Customer Invoice Lines Overview	Work > Additional Features > Asset Management Services > AMS-Customer Invoice Lines Overview
AMS-Customer Invoices	Work > Additional Features > Asset Management Services > AMS-Customer Invoices
AMS-Customers	Work > Additional Features > Service Request > AMS-Customers
AMS-Pricing Schedules	Work > Additional Features > Asset Management Services > AMS-Pricing Schedules
Approval Lists	Work > Revision Control > Approval Lists
Approve Inspection Results	Work > Process > Approve Inspection Results
Aspects	Work > Inspections > Aspects
Assets Healthcare	Work > Verticals > Healthcare > Assets Healthcare
Batch Fuel Issues	Work > Fuel Management > Batch Fuel Issues
Book Labor By Employee	Work > Process > Book Labor By Employee
Book PO Labor	Work > Process > Book PO Labor
Calibration Results	Work > Additional Features > Calibration Results
Campaigns	Work > Projects > Campaigns
Capital Planning Requests	Work > Additional Features > Capital Planning Requests
Conditions	Work > Inspections > Conditions
Contract Templates	Work > Contract Management > Contract Templates
Contractor Portal	Work > Contractor Portal
Customers	Work > Contract Management > Customers
Customer Contracts	Work > Contract Management > Customer Contracts
Customer Invoices	Work > Contract Management > Customer Invoices
Depots	Work > Fuel Management > Depots
Deferred Maintenance	Work > WO Planning > Deferred Maintenance
Employees	Work > Setup > Employees
Facilities	Work > Verticals > Hospitality > Facilities
Findings	Work > Inspections > Findings
Fleet Billing Codes	Work > Additional Features > Fleet > Fleet Billing Codes
Fleet Bills	Work > Additional Features > Fleet > Fleet Bills
Fleet Configuration	Work > Additional Features > Fleet > Fleet Configuration
Fleet Cost Code Search & Replace	Work > Additional Features > Fleet > Fleet Cost Code Search & Replace

Screen	Default navigation
Fleet Customers	Work > Additional Features > Fleet > Fleet Customers
Fleet Markup Codes	Work > Additional Features > Fleet > Fleet Markup Codes
Fleet Vehicle Tickets	Work > Additional Features > Fleet > Fleet Vehicle Tickets
Formulas	Work > Inspections > Formulas
Fuel Physical Inventory	Work > Fuel Management > Fuel Physical Inventory
Fuel Issues	Work > Fuel Management > Fuel Issues
Fuel Receipts	Work > Fuel Management > Fuel Receipts
Fuels	Work > Fuel Management > Fuels
Generate Production Requests	Work > Additional Features > Advanced Maintenance Planning > Generate Production Requests
Generate WOs	Work > Process > Generate WOs
Hazards	Work > Permit to Work > Hazards
Incident Requests	Work > Verticals > Hospitality > Incident Requests
Information Requests	Work > Service Request > Information Requests
Isolation Points	Work > Permit to Work > Isolation Points
Job Plan	Work > Job Plans
Lockout Boxes	Work > Permit to Work > Lockout Boxes
Material Lists	Work > WO Planning > Material Lists
Maintenance Patterns	Work > WO Planning > Maintenance Patterns
Mechanic's Workbench	Work > Mechanic's Workbench
Methods	Work > Inspections > Methods
Monitored Data	Work > Inspections > Monitored Data
Operator Checklist	Work > Additional Features > Operator Checklist
Permits	Work > Permit to Work > Permits
Permit to Work	Work > Permit to Work > Permit to Work
Permit to Work Setup	Work > Permit to Work > Permit to Work Setup
Point Types	Work > Inspections > Point Types
PM Forecasting	Work > WO Planning > PM Forecasting
PM Plans	Work > WO Planning > PM Plans
PM Schedules	Work > WO Planning > PM Schedules
PM Work Packages	Work > WO Planning > PM Work Packages
Precautions	Work > Permit to Work > Precautions
Production Requests	Work > Additional Features > Advanced Maintenance Planning > Production Requests
Projects	Work > Projects > Projects
Project Budgets	Work > Projects > Project Budgets

Screen	Default navigation
Properties	Work > Service Request > Properties
Properties Healthcare	Work > Verticals > Healthcare > Properties Healthcare
Property Information	Work > Service Request > Property Information
Qualifications	Work > Setup > Qualifications
Release Individual PM WOs	Work > Process > Release Individual PM WOs
Reservation Requests	Work > Contract Management > Reservation Requests
Reservations	Work > Contract Management > Reservations
Review Reservation Requests	Work > Contract Management > Review Reservation Requests
Review Operator Checklist	Work > Additional Features > Operator Checklist > Review Operator Checklists
Review Work Requests	Work > Review Work Requests
Revision Approval	Work > Revision Control > Revision Approval
Revision Control History	Work > Revision Control > Revision Control History
Revision Control Setup	Work > Revision Control > Revision Control Setup
Rooms	Work > Verticals > Hospitality > Rooms
Routes	Work > WO Planning > Routes
Service Codes	Work > Service Request > Service Codes
Service Request Portal	Accessed via a special URL.
Service Request Portal - Create Request	Accessed via a special URL.
Service Requests	Work > Service Requests
Shifts	Work > Setup > Shifts
Shutdowns	Work > Projects > Shutdowns
Standard WOs	Work > WO Planning > Standard WOs
Supervisors	Work > Setup > Supervisors
Systems Healthcare	Work > Verticals > Healthcare > Systems Healthcare
Task Plan	Work > WO Planning > Task Plans
Tools	Work > Setup > Tools
Trades	Work > Setup > Trades
Unreturned Cores	Work > Overview > Unreturned Cores
Vehicles	Work > Verticals > Hospitality > Vehicles
Work Requests	Work > Work Requests
EMRS Codes	Work > Setup > EMRS Codes
WO Daily Scheduling	Work > WO Planning > WO Daily Scheduling
WO Load Balancing	Work > WO Planning > WO Load Balancing
WO Scheduling	Work > WO Planning > WO Scheduling
WO Quick Close	Work > WO Quick Close

Screen	Default navigation
WO Quick Entry	Work > WO Quick Entry
WO Update	Work > Process > WO Update
Work Orders Healthcare	Work > Verticals > Healthcare > Work Orders Healthcare
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