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Contents

About this guide................................................................................................................................35
Contacting Infor..................................................................................................................................37

Chapter 1: Basics..............................................................................................................................39
Starting Infor EAM ..........................................................................................................................39
Navigation and user interface..........................................................................................................40
  Header..........................................................................................................................................40
  Menu bar......................................................................................................................................41
  Toolbar.........................................................................................................................................41
  Tabs.............................................................................................................................................42
  Message bar.................................................................................................................................43
  Keyboard shortcuts......................................................................................................................43
  Right-click options....................................................................................................................45
Fields...............................................................................................................................................45
  Updating fields.............................................................................................................................45
  Hidden fields...............................................................................................................................46
  Entering information into fields..................................................................................................46
  Entering dates and times into fields............................................................................................47
  Entering information into fields with the equipment lookup......................................................48
  Entering custom fields................................................................................................................50
  Entering user defined fields........................................................................................................50
Lists..................................................................................................................................................52
  Selecting rows in a list................................................................................................................52
  Defining quick filters on forms....................................................................................................52
  Defining quick filters on lookups................................................................................................54
  Sorting lists..................................................................................................................................56
  Arranging columns in a list..........................................................................................................56
  Resizing columns in a list............................................................................................................56
Contents

Saving the list layout .................................................................................................................... 57
Copying records ........................................................................................................................... 57
Exporting records ......................................................................................................................... 58
Displaying the total record count .................................................................................................. 58
Associating documents .................................................................................................................... 58
Uploading documents .................................................................................................................... 60
Entering comments ....................................................................................................................... 60
  Adding comments ....................................................................................................................... 60
  Modifying comments .................................................................................................................. 61
  Viewing audits for comments ...................................................................................................... 62
Entering description translations .................................................................................................... 63
Viewing electronic records and signatures .................................................................................... 63
Associating addresses .................................................................................................................. 63
Associating parts .......................................................................................................................... 64
Dataspy ........................................................................................................................................ 65
  Editing an existing Dataspy .......................................................................................................... 65
  Creating and saving a new Dataspy ............................................................................................. 66
  Creating a copy of an existing Dataspy ....................................................................................... 66
  Deleting a saved Dataspy ............................................................................................................ 67
  Specifying Dataspy criteria .......................................................................................................... 67
  Hiding global Dataspies .............................................................................................................. 70
Viewing the Start Center ............................................................................................................. 71
Understanding the Start Center inbox .......................................................................................... 71
  Setting up the Start Center inbox ............................................................................................... 72
  Accessing screens from the Start Center inbox ........................................................................ 73
Understanding the Start Center KPIs ............................................................................................ 73
  Setting up the Start Center KPIs .................................................................................................. 73
  Accessing screens from Start Center KPIs ................................................................................ 74
Managing your account ............................................................................................................... 75

Chapter 2: Asset management ...................................................................................................... 77
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding equipment</td>
<td>77</td>
</tr>
<tr>
<td>Setting up initial equipment information</td>
<td>78</td>
</tr>
<tr>
<td>Setting up equipment categories</td>
<td>78</td>
</tr>
<tr>
<td>Setting up closing codes</td>
<td>78</td>
</tr>
<tr>
<td>Setting up departments</td>
<td>80</td>
</tr>
<tr>
<td>Setting up warranties</td>
<td>81</td>
</tr>
<tr>
<td>Creating equipment profiles</td>
<td>83</td>
</tr>
<tr>
<td>Defining equipment</td>
<td>84</td>
</tr>
<tr>
<td>Defining assets</td>
<td>85</td>
</tr>
<tr>
<td>Defining positions</td>
<td>89</td>
</tr>
<tr>
<td>Defining systems</td>
<td>92</td>
</tr>
<tr>
<td>Defining locations</td>
<td>95</td>
</tr>
<tr>
<td>Defining linear equipment</td>
<td>96</td>
</tr>
<tr>
<td>Defining VMRS equipment</td>
<td>97</td>
</tr>
<tr>
<td>Defining equipment using profiles</td>
<td>97</td>
</tr>
<tr>
<td>Defining healthcare assets</td>
<td>98</td>
</tr>
<tr>
<td>Defining healthcare properties</td>
<td>100</td>
</tr>
<tr>
<td>Defining healthcare systems</td>
<td>103</td>
</tr>
<tr>
<td>Creating equipment hierarchies</td>
<td>106</td>
</tr>
<tr>
<td>Defining equipment hierarchies</td>
<td>106</td>
</tr>
<tr>
<td>Reorganizing equipment hierarchies</td>
<td>106</td>
</tr>
<tr>
<td>Viewing equipment hierarchies</td>
<td>107</td>
</tr>
<tr>
<td>Unlinking equipment</td>
<td>107</td>
</tr>
<tr>
<td>Toggling cost rollup</td>
<td>108</td>
</tr>
<tr>
<td>Viewing the parents of assets, positions, or systems</td>
<td>108</td>
</tr>
<tr>
<td>Viewing the parent of a location</td>
<td>108</td>
</tr>
<tr>
<td>Creating work orders</td>
<td>109</td>
</tr>
<tr>
<td>Printing the WO repair costs chart for equipment</td>
<td>109</td>
</tr>
<tr>
<td>Printing the PM repair costs chart for equipment</td>
<td>110</td>
</tr>
<tr>
<td>Associating references with linear equipment</td>
<td>110</td>
</tr>
<tr>
<td>Adding references to linear equipment</td>
<td>110</td>
</tr>
</tbody>
</table>
Searching for references............................................................................................................111
Defining meter information........................................................................................................112
  Defining physical meters......................................................................................................112
  Defining logical meters.......................................................................................................113
Entering meter readings for logical meters.................................................................................114
Viewing meter history..............................................................................................................114
Deleting meter readings from history.........................................................................................114
Associating warranties with equipment....................................................................................115
  Adding calendar-based warranty coverage to equipment..................................................115
  Adding usage-based warranty coverage to equipment.......................................................116
Creating warranty claims.........................................................................................................117
  Entering settlement details for warranty claims...............................................................118
  Printing warranty claim vs. settlement chart..................................................................119
Associating permits with equipment.......................................................................................119
Adding PM schedules to equipment.........................................................................................120
Transferring equipment between organizations.......................................................................122
  Understanding equipment transfer..................................................................................123
  Transferring equipment....................................................................................................124
Creating equipment configurations.........................................................................................124
  Associating child equipment with equipment configurations.......................................127
  Viewing equipment configuration hierarchies.................................................................128
  Defining logical meters for equipment configurations....................................................128
Adding calendar-based warranty coverage to equipment configurations...............................129
Adding usage-based warranty coverage to equipment configurations.....................................129
Generating equipment using equipment configurations........................................................130
  Defining equipment details for equipment generation....................................................131
  Previewing equipment generations..................................................................................131
Tracking asset depreciation......................................................................................................132
  Understanding depreciation methods and daily calculations........................................133
  Understanding periodic depreciation and book value calculations..............................135
  Entering depreciation data..............................................................................................137
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering stock information for parts</td>
<td>215</td>
</tr>
<tr>
<td>Recording stockouts for parts</td>
<td>217</td>
</tr>
<tr>
<td>Calculating economic order quantity (EOQ)</td>
<td>217</td>
</tr>
<tr>
<td>Transferring parts between bins</td>
<td>218</td>
</tr>
<tr>
<td>Transferring parts without requisitions</td>
<td>219</td>
</tr>
<tr>
<td>Generating requisitions</td>
<td>221</td>
</tr>
<tr>
<td>Creating requisitions</td>
<td>224</td>
</tr>
<tr>
<td>Creating requisition headers</td>
<td>225</td>
</tr>
<tr>
<td>Adding parts to requisitions</td>
<td>226</td>
</tr>
<tr>
<td>Adding services to requisitions</td>
<td>231</td>
</tr>
<tr>
<td>Copying requisitions</td>
<td>234</td>
</tr>
<tr>
<td>Creating work orders and activities on the Services page</td>
<td>234</td>
</tr>
<tr>
<td>Manually assigning repair details for core tracked parts on requisitions</td>
<td>235</td>
</tr>
<tr>
<td>Viewing transactions for requisitions</td>
<td>236</td>
</tr>
<tr>
<td>Generating RFQs from requisitions</td>
<td>236</td>
</tr>
<tr>
<td>Approving and rejecting purchasing requisitions</td>
<td>236</td>
</tr>
<tr>
<td>Approving requisitions</td>
<td>237</td>
</tr>
<tr>
<td>Rejecting requisitions</td>
<td>237</td>
</tr>
<tr>
<td>Understanding automatic purchase order generation</td>
<td>237</td>
</tr>
<tr>
<td>Creating a new purchase order from requisition line items</td>
<td>239</td>
</tr>
<tr>
<td>Adding requisition line items to an existing purchase order</td>
<td>240</td>
</tr>
<tr>
<td>Receiving parts</td>
<td>241</td>
</tr>
<tr>
<td>Receiving parts against purchase orders</td>
<td>241</td>
</tr>
<tr>
<td>Viewing processed lines for PO receipts</td>
<td>247</td>
</tr>
<tr>
<td>Creating non-purchase order receipts</td>
<td>249</td>
</tr>
<tr>
<td>Issuing and returning parts</td>
<td>251</td>
</tr>
<tr>
<td>Issuing parts to work orders, equipment, or projects</td>
<td>251</td>
</tr>
<tr>
<td>Issuing parts to multiple equipment work orders</td>
<td>254</td>
</tr>
<tr>
<td>Adding parts on a material list to an issue</td>
<td>256</td>
</tr>
<tr>
<td>Adding parts on a pick ticket to an issue/return</td>
<td>258</td>
</tr>
<tr>
<td>Returning parts from work orders, equipment, or projects</td>
<td>259</td>
</tr>
</tbody>
</table>
Returning parts from multiple equipment work orders ............................................................... 262
Issuing parts from a stock record of a part ................................................................................. 265
Returning parts from a stock record of a part ............................................................................. 266
Returning parts to a supplier ...................................................................................................... 266
Defining part condition templates ............................................................................................ 269
Adding conditions to part condition templates ......................................................................... 269
Changing conditions for parts ................................................................................................. 270
Defining kit template parts ........................................................................................................ 270
Building kits ............................................................................................................................. 271
Breaking up kits ....................................................................................................................... 272
Creating store groups ................................................................................................................ 273
Defining transfer fees for store groups ....................................................................................... 273
Creating store-to-store requisitions .......................................................................................... 274
Creating store-to-store requisition headers ............................................................................. 274
Adding parts to store-to-store requisitions ............................................................................... 276
Creating store-to-store issues ................................................................................................... 277
Creating store-to-store issue headers ...................................................................................... 278
Adding parts to store-to-store issues ....................................................................................... 279
Creating store-to-store receipts ............................................................................................... 281
Creating store-to-store receipt headers ................................................................................... 281
Adding parts to store-to-store receipts .................................................................................... 283
Creating a return requisition for core tracked parts from a store-to-store receipt ...................... 284
Creating internal repair receipts ............................................................................................... 286
Creating internal repair receipt headers ................................................................................... 286
Adding parts to internal repair receipts ................................................................................... 287
Creating pick tickets ................................................................................................................ 289
Defining pick ticket headers ..................................................................................................... 289
Adding parts to a pick ticket ..................................................................................................... 290
Importing a parts list for a pick ticket ....................................................................................... 290
Performing a physical inventory ............................................................................................... 291
Generating a physical inventory counting sheet ...................................................................... 291
Chapter 4: Purchasing management

Defining initial purchase information
Defining purchase order terms
Defining purchasing clauses
Defining delivery addresses
Defining credit cards
Defining users for credit cards
Creating and revising purchase orders
Creating purchase order headers
Adding part details to purchase orders
Creating assets for purchase order items
Adding service details to purchase orders
Associating clauses with purchase orders
Copying purchase orders
Viewing transactions for purchase orders
Viewing tracking for purchase orders
Viewing purchase order history
Updating purchase orders
Creating and using blanket orders
Creating blanket order headers
Adding part details to blanket orders
Adding service details to blanket orders
Associating clauses with blanket orders
Associating purchase order terms with blanket orders
Defining blanket order user authorizations
Creating partial order blanket orders
Recording invoice vouchers
Creating regular invoice vouchers.................................................................339
Booking invoice allocations........................................................................345
Defining requests for quotations..................................................................346
Calculating costs for RFQs.........................................................................348
Defining clauses for RFQs..........................................................................348
Associating parts with RFQs.................................................................348
Selecting items on RFQs...........................................................................350
Defining suppliers for RFQs.................................................................353
Defining services for RFQs......................................................................353
Copying RFQs.........................................................................................354
Editing quotations......................................................................................354
Defining services price information for quotations.................................355
Defining parts price information for quotations........................................356

Chapter 5: Work management.....................................................................357
Defining initial work information.............................................................357
Defining supervisors................................................................................358
Defining permits......................................................................................358
Defining qualifications..........................................................................360
Defining trades.......................................................................................361
Defining employee information...............................................................363
Defining shift information.................................................................369
Defining crews.........................................................................................371
Defining task information......................................................................372
Defining tools.........................................................................................378
Defining material lists...........................................................................379
Copying material lists...........................................................................380
Defining VMRS codes...........................................................................380
Approving and rejecting work requests.................................................381
Approving work requests....................................................................381
Rejecting work requests......................................................................381
Creating incident requests.................................................................382
Creating standard work orders...............................................................383
  Defining standard work order headers...............................................383
  Defining standard work order activities..............................................384
  Copying standard work orders..........................................................385
  Assigning child work orders to standard work orders.......................386
  Managing tools for standard work orders..........................................386
  Associating permits with standard work orders..............................387
  Adding safety hazards and precautions to standard work orders........388
Creating regular work orders...............................................................388
  Defining regular work order headers...............................................389
  Defining regular work order activities..............................................393
  Defining additional costs for work orders........................................395
  Creating a labor requisition...............................................................396
  Scheduling labor for work orders.....................................................397
  Copying an existing labor schedule..................................................398
  Adding equipment to work orders to split work order costs..............398
  Importing equipment from an existing equipment route to work orders...400
  Associating qualifications with work order activities......................401
  Importing unlinked qualifications...................................................401
  Booking labor for work orders........................................................402
  Booking vendor hours for work orders............................................404
  Booking labor by employee.............................................................406
  Booking labor for work orders in a batch.........................................407
  Adding comments to work orders in a batch.....................................408
  Entering work orders on the quick entry form................................408
  Managing parts for work orders......................................................415
  Entering monitored data results for work orders..............................424
  Issuing and returning parts for work orders....................................424
  Entering batch meter readings.........................................................428
  Adding child work orders to a parent work order............................428
Adding permits to work orders....................................................................................................429
Scheduling tools for work orders.............................................................................................430
Recording tool usage for work orders.....................................................................................431
Adding safety hazards and precautions to work orders..........................................................432
Viewing and modifying work orders.......................................................................................433
Updating work orders.............................................................................................................433
Viewing work order costs........................................................................................................434
Viewing child work orders on a parent work order....................................................................438
Viewing service request details..............................................................................................438
Viewing equipment custom fields from a work order...............................................................438
Viewing purchasing for work orders.......................................................................................439
Booking labor for purchase orders.........................................................................................439
Creating capital planning requests........................................................................................440
Creating preventive maintenance work orders.......................................................................441
Defining PM routes and equipment within routes..................................................................442
Defining preventive maintenance schedules.........................................................................443
Defining activities of PM work orders....................................................................................446
Defining equipment for PM schedules...................................................................................447
Viewing work orders per PM schedule..................................................................................450
Viewing comments for PM work order activities....................................................................450
Requesting tools for PM work orders.....................................................................................451
Adding safety hazards and precautions to PM schedules.......................................................451
Releasing PM work orders.......................................................................................................452
Understanding PM work packages.........................................................................................453
Creating and editing PM work packages................................................................................453
Defining equipment for PM work packages............................................................................454
Scheduling employees for PM work packages.......................................................................455
Defining equipment parameters for PM forecasting...............................................................455
Understanding PM forecasting...............................................................................................457
Defining equipment parameters for PM forecasting...............................................................458
Forecasting PMs......................................................................................................................460
Generating work orders..................................................................................................................464
Generating work orders for repairable core parts.............................................................................467
Scheduling work ..................................................................................................................................468
  Viewing the work order schedule ......................................................................................................468
  Calculating labor availability .............................................................................................................469
  Viewing labor utilization ....................................................................................................................470
  Scheduling or rescheduling work orders ............................................................................................471
  Viewing work order comments ..........................................................................................................472
  Changing work order status ..............................................................................................................472
  Freezing and unfreezing activity schedules .......................................................................................473
  Balancing the workload .....................................................................................................................473
  Viewing work order details while balancing the workload .................................................................474
Completing work ..................................................................................................................................475
  Closing work orders ..........................................................................................................................475
  Closing work orders on the quick close form ....................................................................................477
  Updating closing details for work orders in a batch ..........................................................................478
  Reopening closed work orders .........................................................................................................479
Performing revision control ................................................................................................................480
  Defining revision control approval lists .............................................................................................480
  Approving revisions ..........................................................................................................................481
  Rejecting revisions ............................................................................................................................481
  Viewing approvers ............................................................................................................................481
  Approving parent PMs for revision control .......................................................................................481
  Viewing revision control approval history .......................................................................................482
  Setting up revision control for PM work orders ..............................................................................482
  Setting up revision control for hazards ............................................................................................482
  Setting up revision control for isolation points ...............................................................................483
  Setting up revision control for precautions .....................................................................................483
  Setting up revision control for permits ............................................................................................483
Defining initial service request information ........................................................................................484
  Defining customer information .........................................................................................................484
Contents

Associating clauses with customer contracts................................................................. 533
Defining charges for customer contracts........................................................................ 533
Associating adjustments with customer contracts......................................................... 537
Copying customer contracts......................................................................................... 538
Defining customer rental contracts.............................................................................. 539
Associating adjustments with customer rental contracts............................................. 540
Viewing charge definitions for customer rental contracts............................................ 541
Viewing customer invoices......................................................................................... 542
Viewing contract items for customer invoices......................................................... 542
Viewing and modifying customer invoice details....................................................... 542
Viewing invoice generation errors............................................................................. 543
Viewing unreturned core parts.................................................................................. 543
Managing permits to work....................................................................................... 543
Defining permit to work setup.................................................................................. 543
Defining hazards........................................................................................................ 544
Defining precautions................................................................................................. 545
Defining isolation points for equipment.................................................................... 546
Defining lockout boxes for lockout/tagout procedures.............................................. 547
Defining permits to work......................................................................................... 548

Chapter 6: Inspection management............................................................................. 555

Inspection management terms.................................................................................... 555
Defining inspection codes......................................................................................... 558
Defining inspection aspects...................................................................................... 558
Defining inspection point types................................................................................ 559
Defining inspection methods..................................................................................... 559
Defining inspection conditions................................................................................... 560
Defining inspection findings...................................................................................... 560
Viewing monitored data........................................................................................... 561
Defining points.......................................................................................................... 561
Defining equipment inspection points....................................................................... 562
Chapter 9: Reports

Generating reports.................................................................603
Specifying report parameters.............................................603
Specifying report fields layout.........................................603
Specifying report sort order...............................................604
Specifying report group order............................................605
Saving report parameters....................................................605
Retrieving saved report parameters.................................605
Deleting saved report parameters......................................606
Asset reports........................................................................606
Annual energy reduction comparison...............................606
Annual energy use..............................................................607
Asset failures by service life..............................................607
Calibration equipment.........................................................608
Contract reports.............................................................................................................................639
Contract classes............................................................................................................................639
List of debit discounts.................................................................................................................639
List of existing contracts.............................................................................................................640
List of purchases under contract...............................................................................................640
Print contract..............................................................................................................................640
Request discount based on purchases......................................................................................641
Fleet reports...................................................................................................................................641
Fleet billing report.......................................................................................................................641
Vehicle ticket report....................................................................................................................642
VMRS activities..........................................................................................................................643
Healthcare reports.........................................................................................................................643
Print healthcare work orders......................................................................................................643
Equipment list detail-healthcare.................................................................................................644
Labor productivity-healthcare.....................................................................................................645
Medical equipment work orders by criticality..............................................................................645
PM completion for life support equipment..................................................................................646
Work order list-detail-healthcare................................................................................................646
Hospitality reports..........................................................................................................................647
Actual labor hours against estimated - hospitality......................................................................647
Annual energy use-hospitality....................................................................................................647
CO2 emissions-hospitality..........................................................................................................648
Capital performance evaluation-hospitality................................................................................648
Degree day analysis-hospitality..................................................................................................649
GAS index analysis-hospitality....................................................................................................650
Heating and cooling degree days vs. energy consumption type analysis-hospitality.................650
Heating and cooling degree days vs. energy costs analysis-hospitality....................................651
Print hospitality work orders......................................................................................................651
Incident response time chart-hospitality.....................................................................................652
Incident summary chart-hospitality.............................................................................................652
WO backlog hospitality report....................................................................................................653
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WO cost list-hospitality</td>
<td>653</td>
</tr>
<tr>
<td>WO cost summary-hospitality</td>
<td>654</td>
</tr>
<tr>
<td>Inspection reports</td>
<td>654</td>
</tr>
<tr>
<td>Inspection route Report</td>
<td>655</td>
</tr>
<tr>
<td>List of inspection results</td>
<td>655</td>
</tr>
<tr>
<td>List of points to be inspected</td>
<td>656</td>
</tr>
<tr>
<td>Status of inspection points</td>
<td>656</td>
</tr>
<tr>
<td>Materials reports</td>
<td>656</td>
</tr>
<tr>
<td>Average monthly usage analysis</td>
<td>657</td>
</tr>
<tr>
<td>Consignment activity</td>
<td>657</td>
</tr>
<tr>
<td>Goods received note</td>
<td>657</td>
</tr>
<tr>
<td>Goods return note</td>
<td>658</td>
</tr>
<tr>
<td>Inventory standard</td>
<td>658</td>
</tr>
<tr>
<td>Kit templates list</td>
<td>659</td>
</tr>
<tr>
<td>List of expired kits</td>
<td>659</td>
</tr>
<tr>
<td>List of kits</td>
<td>660</td>
</tr>
<tr>
<td>List of outstanding requisition items</td>
<td>660</td>
</tr>
<tr>
<td>List of stock</td>
<td>661</td>
</tr>
<tr>
<td>Monthly usage trends</td>
<td>661</td>
</tr>
<tr>
<td>Parts currently reserved/allocated</td>
<td>662</td>
</tr>
<tr>
<td>Part stockouts</td>
<td>662</td>
</tr>
<tr>
<td>Physical inventory discrepancy</td>
<td>662</td>
</tr>
<tr>
<td>Print build kit list</td>
<td>663</td>
</tr>
<tr>
<td>Print kit restock list</td>
<td>663</td>
</tr>
<tr>
<td>Print physical inventory list</td>
<td>664</td>
</tr>
<tr>
<td>Print pick ticket</td>
<td>664</td>
</tr>
<tr>
<td>Print requisition</td>
<td>665</td>
</tr>
<tr>
<td>Purchase history per item/supplier</td>
<td>665</td>
</tr>
<tr>
<td>Return summary</td>
<td>666</td>
</tr>
<tr>
<td>Stock issues history by part</td>
<td>666</td>
</tr>
<tr>
<td>Stock transactions</td>
<td>667</td>
</tr>
</tbody>
</table>
Contents

Stock value listing by part type.................................................................667

Project reports..........................................................................................668

Cost summary by project and area.............................................................668

List of WOs for project..............................................................................668

Project budget code cost summary............................................................669

Project cost breakdown............................................................................669

Project cost summary...............................................................................670

Project POs..................................................................................................670

Project summary chart.............................................................................671

Purchasing reports....................................................................................671

Approved POs awaiting delivery...............................................................671

Blanket order list.......................................................................................672

List of invoices..........................................................................................672

Pricing variance.........................................................................................673

Print PO.......................................................................................................673

Purchase history per PO/supplier...............................................................674

PO cost summary.......................................................................................674

PO status....................................................................................................675

POs awaiting invoicing..............................................................................676

Quotation summary..................................................................................676

Request for quotation...............................................................................677

Request for quotation summary...............................................................677

Vendor lead time report............................................................................678

Work reports.............................................................................................678

Actual labor hours against estimated......................................................678

Batch work order generation summary..................................................679

Booked labor by activity...........................................................................679

Call Center WO.........................................................................................680

Cost summary by transaction date............................................................680

Customer invoice details.........................................................................681

Customer request chart..........................................................................681
<table>
<thead>
<tr>
<th>Contents</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily hours worked per employee</td>
<td>682</td>
</tr>
<tr>
<td>Daily trade schedule</td>
<td>682</td>
</tr>
<tr>
<td>Delinquent PM summary</td>
<td>683</td>
</tr>
<tr>
<td>Equipment profile</td>
<td>683</td>
</tr>
<tr>
<td>Expired warranties</td>
<td>684</td>
</tr>
<tr>
<td>Future maintenance cost</td>
<td>684</td>
</tr>
<tr>
<td>Hours needed for tasks</td>
<td>685</td>
</tr>
<tr>
<td>Labor required per day or trade</td>
<td>685</td>
</tr>
<tr>
<td>List of all PM schedules</td>
<td>686</td>
</tr>
<tr>
<td>List of permit issues</td>
<td>686</td>
</tr>
<tr>
<td>List of WOs bypassed due to nesting</td>
<td>687</td>
</tr>
<tr>
<td>List of work orders</td>
<td>687</td>
</tr>
<tr>
<td>Long term WO list</td>
<td>688</td>
</tr>
<tr>
<td>Material requirements analysis</td>
<td>688</td>
</tr>
<tr>
<td>Meter based PM due report</td>
<td>689</td>
</tr>
<tr>
<td>Monthly scheduling details</td>
<td>689</td>
</tr>
<tr>
<td>Part failures</td>
<td>690</td>
</tr>
<tr>
<td>Permits for WOs</td>
<td>690</td>
</tr>
<tr>
<td>PM compliance</td>
<td>691</td>
</tr>
<tr>
<td>PM forecasting</td>
<td>691</td>
</tr>
<tr>
<td>PM schedule profile</td>
<td>691</td>
</tr>
<tr>
<td>Print customer contract</td>
<td>692</td>
</tr>
<tr>
<td>Print permit to work</td>
<td>693</td>
</tr>
<tr>
<td>Print short WO cards</td>
<td>693</td>
</tr>
<tr>
<td>Print work order</td>
<td>695</td>
</tr>
<tr>
<td>Proof of delivery</td>
<td>696</td>
</tr>
<tr>
<td>Qualification expiration report</td>
<td>696</td>
</tr>
<tr>
<td>Qualification requirement report</td>
<td>697</td>
</tr>
<tr>
<td>Resource load graph</td>
<td>697</td>
</tr>
<tr>
<td>Safety review required report</td>
<td>697</td>
</tr>
<tr>
<td>Schedule attainment</td>
<td>698</td>
</tr>
</tbody>
</table>
Chapter 10: GIS integration

Linking Infor EAM equipment and GIS features................................................................. 707
  Processing rules for defining equipment records within ESRI......................................... 707
  Defining Infor EAM equipment (ESRI)............................................................................. 709
  Processing rules for defining GIS features within Infor EAM........................................... 709
  Defining GIS features (Infor EAM).................................................................................. 710
Synchronizing records (ESRI)........................................................................................... 710
  Synchronizing equipment with features (ESRI)............................................................... 710
  Synchronizing features with equipment (ESRI)............................................................... 711
  Synchronizing attributes (ESRI)..................................................................................... 712
Applying a data filter (ESRI)............................................................................................. 715
  Running a data filter (ESRI)............................................................................................ 715
  Saving filter criteria (ESRI)............................................................................................ 716
  Running existing data filters (ESRI)................................................................................ 717
  Viewing data filter results (ESRI)................................................................................... 717
Understanding fleet management terms..........................................................743
Understanding motor pool management..........................................................746
Understanding the fleet billing process..........................................................746
Creating vehicle tickets..................................................................................747
   Associating billing exceptions with vehicle tickets......................................749
   Viewing billing adjustments for vehicle tickets...........................................749
Viewing fleet bills..........................................................................................750
   Modifying fleet bills...................................................................................750
   Viewing billing details for fleet bills...........................................................750
   Creating pool and loaner adjustments for fleet bills.....................................752
   Creating assignment adjustments for fleet bills..........................................753

Chapter 12: Infor EAM Microsoft Project interface...........................................755
   Installing the Infor EAM MS Project interface...........................................755
   Choosing a Language for the Infor EAM MS Project Interface....................756
   Setting up connection information...............................................................756
   Associating Infor EAM priority codes with MS Project priority codes.........757
   Creating scheduling sessions in Infor EAM................................................757
   Importing sessions into MS Project from Infor EAM.................................759
   Creating and adding work orders and activities to scheduling sessions........760
      Creating a work order and adding it to an existing scheduling session.......760
      Creating a work order activity and adding it to an existing scheduling session...761
   Importing work orders into open MS Project scheduling sessions from Infor EAM..762
   Exporting sessions from MS Project to Infor EAM.....................................762
   Canceling sessions......................................................................................763

Chapter 13: Asset management services.........................................................765
   Creating customer contracts.......................................................................765
   Creating fixed charge schedules for customer contracts.............................766
   Creating pricing schedules.........................................................................767
   Creating custom trade rates.......................................................................768
Chapter 17: Web service prompt execution

Executing web service prompts

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

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

Glossary
About this guide

Objectives
This guide contains procedures for basic operations, asset management, materials management, data collection, purchasing management, work management, budget management, inspections management, project management, reports, and call center management within Infor EAM.

Intended audience
This guide is intended for the Infor EAM user.

Organization of this guide
This table describes the chapters of this guide:

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basics</td>
<td>Instructions on basic operation of Infor EAM</td>
</tr>
<tr>
<td>Asset management</td>
<td>Instructions on how to control the organization and use of material equipment</td>
</tr>
<tr>
<td>Materials management</td>
<td>Instructions on how to maintain materials inventory using an online catalog of parts, stores, manufacturers, and suppliers</td>
</tr>
<tr>
<td>Purchasing management</td>
<td>Instructions on how to facilitate the process of purchasing goods</td>
</tr>
<tr>
<td>Work management</td>
<td>Instructions on how to manage work by creating, planning, and scheduling work orders</td>
</tr>
<tr>
<td>Inspection management</td>
<td>Instructions on how to control preventive maintenance (PM) functions within your organization</td>
</tr>
<tr>
<td>Calibration management</td>
<td>Instructions on how to maintain calibration data to ensure the accuracy of your equipment</td>
</tr>
<tr>
<td>Project management</td>
<td>Instructions on how to define special projects in addition to the work defined in the work management and asset management modules</td>
</tr>
<tr>
<td>Reports</td>
<td>Instructions on how to specify report parameters and generate reports within Infor EAM</td>
</tr>
</tbody>
</table>
### About this guide

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

- *Infor EAM System Administrator's Guide*
- *Infor EAM Installation Guide*

### Table of contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GIS integration</td>
<td>Instructions on how to show equipment spatially via maps to better locate the equipment, directions to the equipment, work history of the equipment, and the surrounding area of the equipment</td>
</tr>
<tr>
<td>Fleet management</td>
<td>Instructions on how to manage fleet motor pools and the fleet billing process</td>
</tr>
<tr>
<td>Infor EAM Microsoft Project interface</td>
<td>Instructions on how to facilitate work order scheduling and resource assignment in MS Project and the Infor EAM database</td>
</tr>
<tr>
<td>Asset management services</td>
<td>Instructions on how to operate as a business unit and charge the cost of maintenance work to the customers for whom the work is performed</td>
</tr>
<tr>
<td>Budgets</td>
<td>Instructions on how to define budgets to track expenses and set spending limits for specified time periods or items</td>
</tr>
<tr>
<td>Contracts</td>
<td>Instructions on how to define purchasing contracts for details on agreements for parts</td>
</tr>
<tr>
<td>Call Center</td>
<td>Instructions on how to handle incoming customer requests for action, information, or comments</td>
</tr>
<tr>
<td>Web service prompt execution</td>
<td>Instructions on how to create user-defined screens that utilize web services on which the system is architected</td>
</tr>
</tbody>
</table>

### Related documents

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

- *Infor EAM System Administrator's Guide*
- *Infor EAM Installation Guide*
Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

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

If you have comments about Infor documentation, contact documentation@infor.com.
This chapter describes Infor EAM features and outlines the procedures for basic operation.

## Starting Infor EAM

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

To start Infor EAM:

1. Choose **Start > Programs > Internet Explorer** from the Windows taskbar.
2. **Address**—Enter the URL provided by your system administrator. Internet Explorer displays the login page.
3. **UserID**—Enter your user ID.
4. **Password**—Enter your password.
   
   **Note:** Users can change passwords at any time. Periodically, the system requires that you change your password.

5. **Click Log In.**

   If you have query rights for the Start Center home page, the system displays work orders, purchase requisitions, and service requests assigned to you. To see the record details, double-click the selected record.

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

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

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

See the following sample screen, which details the user interface:

![User Interface Diagram]

**Header**

Access basic functions on the header drop-down, which is displayed in the left-hand pane on all pages. Additionally, click on the navigation tabs to access the major functional areas or modules within the system.

See the following descriptions when accessing options on the header:

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>START CENTER</td>
<td>Displays the <strong>Start Center home</strong> page</td>
</tr>
<tr>
<td>MY ACCOUNT</td>
<td>Displays the <strong>My Account</strong> page, which allows you to view and change your e-mail address, system language, login password, and success message information</td>
</tr>
</tbody>
</table>
HELP
Displays help topics covering system procedures and a link to the User's Guide

ABOUT
Displays system application information, such as application name, version number, schema name, and user ID

LOGOUT
Logs out of Infor EAM

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

Click the drop-down menu to view the screens currently in the history queue. This includes most recently viewed screens during a session, and the cached screen folder, with cached screens displaying alphabetically. The entire history is cleared when you log out and therefore won’t be available when you log back in.

Toolbar
Access basic system functions on the toolbar. Hover the cursor over a button to view a pop-up description of the button’s function.

See the following descriptions when accessing buttons on the toolbar:

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Screen</td>
<td>Returns to the previous page</td>
<td>CTRL+Left Arrow or F11</td>
</tr>
<tr>
<td>Save Record</td>
<td>Saves the current record</td>
<td>CTRL+S or F10</td>
</tr>
<tr>
<td>New Record</td>
<td>Inserts a new record</td>
<td>CTRL+N or F6</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Deletes the record</td>
<td>CTRL+D or CTRL+F6</td>
</tr>
<tr>
<td>Next Record</td>
<td>Displays the next record</td>
<td>CTRL+Down Arrow</td>
</tr>
<tr>
<td>Previous Record</td>
<td>Displays the previous record</td>
<td>CTRL+Up Arrow</td>
</tr>
</tbody>
</table>
**Copy Record**—Copies the current record. See "Copying records" on page 57.

**Reset Screen**—Clears changes to the current record

**Print Record**—Prints the current record

**Print Preview**—Displays a preview of the current report

**Help**—Displays online help for the current page

**Screen Designer**—Displays the page in designer mode, for system administrators only

**EPAK**—Opens a link to Infor’s Education Performance Accelerator Kit (EPAK), an end-user training and support application to help you get up and running quickly.

**Expand Left**—Closes the summary grid and displays the full record view layout.

**Split View**—Restores the split view layout with a summary grid of records on the left-pane and a record view layout on the right-pane.

**Expand Right**—Closes the record view and displays a full list view layout.

**Tabs**

Some forms within the system include multiple tabs. Each tab displays a page on the form. Some tabs are displayed by default, and others must be manually added to the form.

To add a tab to a form, click , and then choose the tab to add. The added tab will not be saved by default after you log out of the system. Permanently adding a tab is a security function performed by your system administrator. Contact your system administrator for more information.
Message bar

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

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

Keyboard shortcuts

Keyboard shortcuts are keys or key combinations for functions within Infor EAM.

System keyboard shortcuts

The following keyboard shortcuts allow easy access to the system-level functions available on the header.

<table>
<thead>
<tr>
<th>Function</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Account</td>
<td>CTRL+F9</td>
</tr>
<tr>
<td>Help</td>
<td>CTRL+H</td>
</tr>
<tr>
<td>About</td>
<td>CTRL+F10</td>
</tr>
<tr>
<td>Log Out</td>
<td>CTRL+Q</td>
</tr>
<tr>
<td>Opens first listing in the Main Menu</td>
<td>CTRL+M</td>
</tr>
</tbody>
</table>

Screen-level keyboard shortcuts

The following keyboard shortcuts allow easy access to screen-level functions.

<table>
<thead>
<tr>
<th>Function</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next record</td>
<td>CTRL+Down Arrow</td>
</tr>
<tr>
<td>Previous record</td>
<td>CTRL+Up Arrow</td>
</tr>
</tbody>
</table>
## Keyboard shortcuts

**Shortcut Function**  

<table>
<thead>
<tr>
<th>Function</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy record</td>
<td>CTRL+F or F4</td>
</tr>
<tr>
<td>New record</td>
<td>CTRL+N (not supported for Chrome) or F6</td>
</tr>
<tr>
<td>Save record</td>
<td>CTRL+S or F10</td>
</tr>
<tr>
<td>Reset screen</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Back/Previous screen</td>
<td>CTRL+Left or F11</td>
</tr>
<tr>
<td>Delete record</td>
<td>CTRL+D or CTRL+F6</td>
</tr>
<tr>
<td>Help (toolbar button)</td>
<td>ALT+H</td>
</tr>
<tr>
<td>EPAK</td>
<td>ALT+K</td>
</tr>
<tr>
<td>Open lookup</td>
<td>F9</td>
</tr>
<tr>
<td>Screen-level help</td>
<td>F1</td>
</tr>
<tr>
<td>Print screen</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Open/close the multi-field search on List View and Record View screens</td>
<td>F7</td>
</tr>
<tr>
<td>Execute a multi-field search</td>
<td>F8</td>
</tr>
<tr>
<td>Open the Jump to Screen popup</td>
<td>CTRL+F2</td>
</tr>
<tr>
<td>Clear the filter values and reset the operators in the multi-field search</td>
<td>ALT+C</td>
</tr>
</tbody>
</table>

## 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>
<thead>
<tr>
<th>Function</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save layout</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Open group selection</td>
<td>CTRL+G</td>
</tr>
<tr>
<td>Switch to preview mode</td>
<td>CTRL+W</td>
</tr>
<tr>
<td>Switch to screen designer mode</td>
<td>ALT+E</td>
</tr>
<tr>
<td>Exit screen designer mode</td>
<td>CTRL+I</td>
</tr>
</tbody>
</table>
Right-click options

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

Screen-level options

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

System-level options

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

Fields

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

Updating fields

Right-click in a field within a grid to update selected rows. Updating fields in Infor EAM follows the standard Windows controls for selecting rows:

- **CTRL+CLICK**: Individually selects and unselects rows
- **SHIFT+CLICK**: Selects all rows between the clicked row and the most recently selected row.
  
  Shift+Click also unselects all rows that do not meet the criteria above.

The header at the top of the form will not update for subsequent selections; it will always show the first record selected. Therefore, if the List View page has multiple records selected, the system remains on the record displayed in the header. The multi-selection is lost when you leave the page.

If you click off the record that is currently being displayed in the header, the system displays the top-most selected record in the header.

**Note**: The update fields feature is available only on the following List View pages: Work Orders, Parts, Equipment, Requisitions, Purchase Orders, and User ID.

To update fields:

1. Select the records to update.
2. Right-click on a selected record, and then select **Update Field**.
3. **Field**—Select the field to update.
Note: Not all fields are available for update in the right-click options. If a field is Protected or Hidden, it is not included in the list. In addition, some fields with associated special business rules, i.e., prompting the user with a yes/no question, are excluded.

4 **New Value**—Enter the new value for the field.
5 **Set Value to Null**—Select to set the field to null.
6 **Click Submit**.

Hidden fields

The system only displays certain fields by default upon delivery. The user documentation includes steps and procedures for all fields, even if they are hidden upon delivery. Your system administrator has the rights to hide and unhide fields as necessary.

Entering information into fields

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

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Entering Information and Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text box</td>
<td>Enter information directly into the field.</td>
</tr>
<tr>
<td>Drop-down list</td>
<td>Click the drop-down list, and then select the value from the displayed list.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: Begin typing in the field to quickly narrow the list of selections.</td>
</tr>
<tr>
<td>Lookup</td>
<td>Enter the value or click <strong>Lookup</strong>, and then select the value from the lookup page.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: If the field calling the lookup has two levels, then you can select a top-level record and then view and select the second-level record. When you select the second-level record, the system returns both values.</td>
</tr>
<tr>
<td>Equipment Lookup</td>
<td>Enter the value or click <strong>Lookup</strong>, The system displays the Equipment Lookup popup.</td>
</tr>
<tr>
<td>Task Lookup</td>
<td>Enter the value or click <strong>Lookup</strong>, The system displays the Tasks popup.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: The system displays the task instructions for the selected task.</td>
</tr>
</tbody>
</table>
Select the task, and then click **OK**. The system closes the Tasks popup and populates **Task**.

<table>
<thead>
<tr>
<th>Bin Lookup</th>
<th>Enter the value or click <strong>Lookup</strong>. The system displays either the Bins popup or the Bin Lookup popup depending on the calling form. If the system displays the Bins popup, apply a filter as necessary. Select a record from the Bins list, and then click <strong>OK</strong>. If the system displays the Bin Lookup popup, select to view <strong>All Bins</strong>, <strong>Bins for Part</strong>, or <strong>Unassociated Bins</strong>. Select a record from the Bins list, and then click <strong>OK</strong>.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Enter text directly into the comment field. Use the scroll bar to scroll through a comment that extends beyond the provided area.</td>
</tr>
<tr>
<td>Radio button</td>
<td>Select one of the values.</td>
</tr>
<tr>
<td>Check box</td>
<td>Select to activate/deactivate the option.</td>
</tr>
</tbody>
</table>

### Entering dates and times into fields

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

### Entering dates with the calendar

To enter dates with the calendar:

1. Click **Calendar** next to the date field.
   
   **Note**: Press F9 while your cursor is positioned in the date field to display the calendar.

2. Select the month and year from the drop-down lists on the top of the calendar.
   
   **Note**: Click **Previous Month** next to the month or year drop-down lists to select the month or year previous to the displayed value. Click **Next Month** beside the month or year drop-down lists to select the month or year following the displayed value.

3. Click the desired date. The system automatically populates the selected date in the field.
Entering dates and times with the calendar

To enter dates and times with the calendar:

1. Click next to the date/time field.

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

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

   **Note:** Click next to the month or year drop-down lists to select the month or year previous to the displayed value.
   Click next to the month or year drop-down lists to select the month or year following the displayed value.

3. Click the desired date, and then enter the desired time for **Hour** and **Minute**. The system automatically populates the selected date and time in the field.

Entering dates with keyboard shortcuts

To enter dates with keyboard shortcuts:

1. Position the cursor in the date field.

2. Choose one of the following options as necessary:
   - **Enter the current date**—Press SPACEBAR.
   - **Enter a specific date or partial date**—Press numeric keys to enter the desired date (e.g., 070102), and then press TAB to exit the field. The system evaluates the date and displays the closest match in the required format (e.g., Jul/01/2002).

   **Note:** Use the "+" and "+" keys to change the date when the cursor is in the date field. Press the "+" key to add one day to the date. Press the "+" key to subtract one day from the date.

Entering information into fields with the equipment lookup

The equipment lookup enables you to search for assets, positions, systems, and locations and retrieves them to fields and forms within the system. You can filter the list of records in the lookup based on the key fields and many attributes of the equipment. You can also view an equipment’s hierarchy using the equipment lookup and retrieve equipment records to fields and forms within the system from the Structure Details.

**Note:** When invoked from some forms within the system, the equipment lookup enables you to retrieve multiple equipment records to forms at once.
Entering equipment with the equipment lookup

To enter equipment with the equipment lookup:

1. From any form containing the equipment lookup, click .

   **Note:** Enter the first few characters of the value for which you are searching, and then click . The system displays all values beginning with the characters you entered.

   If you entered the first few characters of the piece of equipment and only one equipment record that begins with those characters exists in the database, the system automatically displays the equipment record on the **Structure** page. The system does not display any equipment records until you conduct a search.

2. Choose one of the following options:
   - **Dataspy**—Select an existing Dataspy or edit an existing dataspy. The system applies the Dataspy to the list view.
   - **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**. The system displays equipment records that are not Out of Service or Withdrawn.

3. Choose one of the following options:
   - Double click the row containing the equipment to retrieve. The system retrieves the equipment record to the form.
   - **Select**—Select for each equipment record to retrieve, and then click **OK**. The system retrieves the selected equipment record(s) to the form.

4. Click **OK**. The system displays the equipment on the form.

Viewing equipment hierarchies with the equipment lookup

View equipment hierarchies of parent/child relationships between equipment. Select records within the hierarchy to retrieve equipment forms and fields within the system.

To view equipment hierarchies with the equipment lookup:

1. From any form containing the equipment lookup, click .
2. **Dataspy and Quick Filter**—Query for the equipment for which to view a hierarchy.
3. Select the record for which to view the equipment hierarchy, and then click the **Structure** tab.
4. Choose one of the following options as necessary:
   - Click **Display as Focal Point**. The system sets the focus of the **Structure** tab to the selected record.
   - Click **Show Details**. The system returns to the **Search** page and updates the Equipment list with only the selected record.

   **Note:** Click the **Search** tab to return to the **Search** page without selecting a specific record from the equipment hierarchy.
5 Select the record(s) to retrieve, and then click OK.

Entering custom fields
Further define records with custom fields.

**Note:** Define custom fields on the **Custom Fields** form and the **Associate Custom Fields** form. Contact your system administrator for more information.

To enter custom fields:

1 From any form, click the **Record View** tab.
2 Enter information in the fields as necessary.
3 Click **Save Record**.

Entering user defined fields
Enter user defined fields as an alternative to custom fields. User defined fields are stored in the parent table of each record (rather than in a separate table as with custom fields).

To enter user defined fields:

1 From any form containing user defined fields, click the **Record View** tab.
2 Enter information in the fields as necessary.
3 Click **Save Record**.

**Note:** Fields types available are text, date/time, number, and checkbox.

Defining options for user defined text fields
To define options for user defined text fields:

1 Click the **Record View** tab.
2 In Screen Designer mode, right-click in a user defined text field, and then select **User Defined Field Options**.
3 **Lookup Type**—Choose one of the following options:
   - **None**
   - **Code**
   - **Code and Description**
   - **Entity**
4 **Lookup Entity**—Enter the entity to be used for the lookup.
Note: Lookup Entity is available only for Lookup Types of Entity.

5 Minimum Value—Enter the minimum value for the field.
6 Maximum Value—Enter the maximum value for the field.
7 Validate Against Lookup—Select to validate this field against the lookup.
8 Print UDF on Supported Reports—Select to print this field on reports with the Print UDF option.
9 Enable UDF for Add-ons—Select to enable this field for add-ons.
10 Click Submit.

Defining options for user defined date/time fields

To define options for user defined date/time fields:

1 Click the Record View tab.
2 In Screen Designer mode, right-click in a user defined date/time field, and then select User Defined Field Options.
3 Minimum Value—Enter the minimum value for the field.
4 Maximum Value—Enter the maximum value for the field.
5 Display Time Element—Select to display the time element adjacent to the date.
6 Print UDF on Supported Reports—Select to print this field on supported reports.
7 Enable UDF for Add-ons—Select to enable this field for add-ons.
8 Click Submit.

Defining options for user defined number fields

To define options for user defined number fields:

1 Click the Record View tab.
2 In Screen Designer mode, right-click in a user defined number field, and then select User Defined Field Options.
3 Minimum Value—Enter the minimum value for the field.
4 Maximum Value—Enter the maximum value for the field.
5 Number Type—Choose one of the following options:
   • Number
   • Currency
   • Integer
5 UOM Value—Enter the unit of measure for the field.
7 Print UDF on Supported Reports—Select to print this field on supported reports.
8 Enable UDF for Add-ons—Select to enable this field for add-ons.
9 Click Submit.
Defining options for user defined checkbox fields

To define options for user defined checkbox fields:

1. Click the Record View tab.
2. Enter information in the fields as necessary.
3. In Screen Designer mode, right-click in a user defined checkbox field, and then select User Defined Field Options.
4. Print UDF on Supported Reports—Select to print this field on reports with the Print UDF option.
5. Enable UDF for Add-ons—Select to enable this field for add-ons.
6. Click Submit.

Lists

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

Selecting rows in a list

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

To select rows in a list:

1. Open any page or lookup containing a list of records.
2. Click anywhere in the row to select the row.
3. Choose one of the following options:
   • Perform an action on the selected row—Click the button corresponding with the action.
   • If the row is in a list view, view the details of the record associated with the row—Double-click the row.
   • If the row is in a lookup list view, copy the row data to fields on the original page—Double-click the row (or select the row, and then click OK).

Defining quick filters on forms

Filter a list of records on forms to display only those records that meet your specified criteria.
**Note:** The system applies the filter in addition to any filter criteria specified in a Dataspy that is applied to the list.

**Note:** To filter multiple fields simultaneously on the list view, click Grid Menu, and then select **Show Filter Row**. The system displays the filter row on the list view. Select the operators for multiple fields, click **Filter Menu**, and then click **Run Filter Menu**. The system displays the records matching the filter criteria.

To define quick filters on forms:

1. Open any form containing a list of records.
   
   **Note:** On list views, the system displays the number of records that were located using the specified Dataspy on the filter bar.

2. **Filter**—Select the field on which to filter from the first drop-down list.
   
   **Note:** For forms that include custom fields, the custom fields are displayed at the end of the filter drop-down list. Only custom fields associated to the entity of the screen AND associated to a class with an organization for which the user has query rights will be displayed. If more than one entity exists for the screen, then only the primary entity will be used.

   The field being queried, which is the first field of the three, defaults to the first column in the grid unless the first column is a non-data bound select checkbox. To change the default quick filter, modify the grid layout then save the changes. See "Saving the list layout" on page 57. The operator of the quick filter, which is the second field of the three, can default to Starts With or Contains. Set the value of the QUICKDEF install parameter to S or C.

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

<table>
<thead>
<tr>
<th>Operator</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starts With</td>
<td>Search for items with a description that begins with the entered value.</td>
</tr>
<tr>
<td>Equals</td>
<td>Search for items with a value equal to the entered value.</td>
</tr>
<tr>
<td>Does Not Equal</td>
<td>Search for items with a description that does not equal the entered value.</td>
</tr>
<tr>
<td>Contains</td>
<td>Search for items with a description that contains the entered value.</td>
</tr>
<tr>
<td>Does Not Contain</td>
<td>Search for items with a description that does not contain the entered value.</td>
</tr>
<tr>
<td>Ends With</td>
<td>Search for items with a description that ends with the entered value.</td>
</tr>
<tr>
<td>Is Empty</td>
<td>Search for items with a description that has no entered value.</td>
</tr>
<tr>
<td>Is Not Empty</td>
<td>Search for items with a description that has any entered value.</td>
</tr>
</tbody>
</table>
### Definition

<table>
<thead>
<tr>
<th>Operator</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than</td>
<td>Search for items with a value less than the entered value.</td>
</tr>
<tr>
<td>Greater Than</td>
<td>Search for items with a value greater than the entered value.</td>
</tr>
<tr>
<td>Less Than or Equals</td>
<td>Search for items with a value less than or equal to the entered value.</td>
</tr>
<tr>
<td>Greater Than or Equals</td>
<td>Search for items with a value greater than or equal to the entered value.</td>
</tr>
<tr>
<td>Selected</td>
<td>Search for items where the checkbox is selected. This applies to checkbox fields only.</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Search for items where the checkbox is not selected. This applies to checkbox fields only.</td>
</tr>
<tr>
<td>Either Selected or Not Selected</td>
<td>Search for items where the checkbox is either selected or not selected. This applies to checkbox fields only.</td>
</tr>
</tbody>
</table>

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

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

5 Click **Run**.

### Defining quick filters on lookups

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

**Note:** The system applies the filter in addition to any filter criteria specified in a Dataspy that is applied to the list.

To define quick filters on lookups:

1 Open any lookup containing a list of records.
2 **Filter**—Select the field on which to filter from the first drop-down list.

**Note:** For forms that include custom fields, the custom fields are displayed at the end of the filter drop-down list. Only custom fields associated to the entity of the screen AND associated to a class with an organization for which the user has query rights will be displayed. If more than one entity exists for the screen, then only the primary entity will be used.

3 Select an operator from the second drop-down list. See the following table for operator options:
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<tr>
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</tr>
<tr>
<td>Does Not Contain</td>
<td>Search for items with a description that does not contain the entered value.</td>
</tr>
<tr>
<td>Ends With</td>
<td>Search for items with a description that ends with the entered value.</td>
</tr>
<tr>
<td>Is Empty</td>
<td>Search for items with a description that has no entered value.</td>
</tr>
<tr>
<td>Is Not Empty</td>
<td>Search for items with a description that has any entered value.</td>
</tr>
<tr>
<td>Less Than</td>
<td>Search for items with a value less than the entered value.</td>
</tr>
<tr>
<td>Greater Than</td>
<td>Search for items with a value greater than the entered value.</td>
</tr>
<tr>
<td>Less Than or Equals</td>
<td>Search for items with a value less than or equal to the entered value.</td>
</tr>
<tr>
<td>Greater Than or Equals</td>
<td>Search for items with a value greater than or equal to the entered value.</td>
</tr>
</tbody>
</table>

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

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

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

6 Click the AND/OR hyperlink to select one of the following join operators:
   • Include records that include all joined conditions—Select AND.
   • Include records that contain one or the other condition—Select OR.

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

8 Enter additional conditions by which to filter as necessary.

9 DefaultDataspy—Select to make the Dataspy the default Dataspy for the form.
Click Run.

Note: You can also press ENTER to display the records matching the filter criteria.

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

To sort lists:

1. Open any page or lookup containing a list of records.
2. Choose one of the following options:
   - Sort the records in ascending (A-Z) order—Double-click the column header of the column by which to sort the list. The system displays † on the header.
   - Sort the records in descending (Z-A) order—Double-click the column header of the column by which to sort the list, and then double-click the column header again. The system displays ‡ on the header.

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

To arrange columns in a list:

1. Open any page or lookup containing a list of records.
2. Click and hold the column header of the column to move.
3. Holding the mouse button down, drag the header on top of the column header next to which you want the column to appear until the target column header is highlighted.

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

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

   Note: To save the order and sizes of the columns, click Save Record in the upper-right part of the list view.

Resizing columns in a list
Specify the widths of columns in a list.

To resize columns in a list:
1 Open any page or lookup containing a list of records.
2 Position your mouse over the right-hand border of the column to resize. The system displays <-> as the mouse icon.
3 Click and hold the column border, and then drag the border in the desired direction to increase or decrease the width of the column.
4 Release the mouse button. The system resizes the column.

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

---

Saving the list layout

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

To save the list layout:

1 Open the form for which to save the layout.
2 Modify the page layout as necessary.
3 Click Grid Menu in the upper-right part of the list view.
4 Click Save Grid Layout.
5 Click OK.

---

Copying records

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

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

To copy records:

1 Open the form for which to copy records.
2 Select the record to copy, and then click Copy Record. The system copies values from the previously selected record to the new record, including custom fields, and displays the form in insert mode.

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

3 Modify the record as necessary.
4 Click Save Record.
Exporting records

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

To export records:

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

2. Click Grid Menu.

3. Click Save Grid to Excel. The system opens a new browser window and displays the exported records in Excel format.
   
   **Note**: The export to Excel function exports a maximum of 64,000 records.

4. Save the file as necessary.

Displaying the total record count

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

To display the total record count:

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

2. Click Show Total Record Count. The system displays a message indicating the total number of records.

3. Click OK.

Associating documents

Associate documents with records using the Documents page and specify whether the system copies and/or prints document attachments linked to work orders. For example, a technician who created an equipment record needs to attach a document to the record, e.g., schematics, drawings, warranties, etc.

The copy and print options displayed on the Documents popup change dynamically depending on the record to which you are linking a document. Documents can be of any file type. The documents being associated must have already been created using the Documents form.
**Note:** You can only print document attachments that are Adobe Acrobat Portable Document Format (.PDF) files for work orders.

To associate documents:

1. From any form, click the **Documents** tab.
2. Click **Add Document**.
3. **Document**—Enter the document to associate. The system automatically populates the **Document Description**.
4. Choose one or more of the following options as necessary:
   - **Print with Work Order/Print with Purchase Order**—Select to enable the system to print document attachments when you print the work order or purchase order. If selected, the system prints the .PDF attachments from the purchase order or work order. **Print with Work Order** is only displayed for document attachments associated with assets, systems, positions, categories, profiles, work orders, and preventive maintenance schedules. **Print with Purchase Order** is only displayed for documents associated with parts and purchase orders.
   - **Copy to Work Order/Copy to Purchase Order**—Select to enable the system to copy any document attachments associated with a part on a purchase order line to the purchase order or to copy any document attachments associated with a piece of equipment on a work order to the work order. If selected, the system copies the document attachments from the part, equipment, PM, or standard work order to the purchase order or new work order. **Copy to Work Order** is only displayed for document attachments associated with the OBJ, STWO, or PPM entities. **Copy to Purchase Order** is only displayed for document attachments associated with the PART entity.

   **Note:** You can only select to copy a document attachment to a purchase order or work order when you originally create the purchase order or work order. After saving a purchase order or work order to the database, modifying the copy settings for document attachments for a part, equipment, PM, or standard work order will not roll down and affect any existing purchase orders or work orders. Any changes made to the copy settings for document attachments after initially saving them to the database will only affect any purchase orders or work orders for the part, equipment, PM, or standard work order when a new purchase order or work order is generated for the modified part, equipment, PM, or standard work order.

   Choose one of the following options:
   - **Copy Link**—Select to copy the link to the document.
   - **Copy Document**—Select to make a copy the document and link the copy to the work order.
   - **Print with Report**—Select to enable the system to print document attachments when you print reports. If selected, the system prints the .PDF attachments from the report. **Print with Report** is not displayed for document attachments associated with assets, systems, positions, work orders, parts, purchase orders, or customer requests.

   **Note:** Although the **Print with Report** checkbox is available on all entities, only some reports support the Print Attachments option.

5. Click **Save**. The system updates the Documents list.
**Uploading documents**

Upload a document from your local system to the web server. The system uploads the document and creates a new document record. If the new document record is created from the Documents tab of a form, the system associates the new document record to the selected record on the specific form. For example, a foreman may create a piece of equipment and attach a document such as a drawing, a warranty, or other schematic to the equipment by uploading the document to the equipment record.

To upload documents:

1. From any form, click the **Documents** tab.
2. Click **Create/Upload Document**.
3. **Document Code**—Enter a unique code identifying the document, and then enter a description of the document in the adjacent field code.
4. **Organization**—Enter a document organization.
5. Choose one of the following options as necessary:
   - **Create File System Document**—Select to create a file system document.
   - **Upload Document**—Select to upload a document.
6. **File Name**—Enter the file name, or click **Browse**.
7. **File Path**—Enter the file path.
8. Click **Submit**.

**Entering comments**

Enter comments for most modules in the system using the **Comments** page. You can also specify whether the comment should print with the specified record.

Access the Add/Edit Comments page via the Add/Edit Comments link on certain forms. The procedures for entering comments are the same, regardless of how you access the Add/Edit Comments page.

**Adding comments**

Enter comments on records.
To add comments:

1. From any form which supports comments, select the record for which to add comments, and then choose one of the following options:
   - **Using the Comments tab**—Click the Comments tab. The system displays the Comments page. Click on Add/Edit Comments. At the bottom of the page, the system expands the Add/Edit Comments section with HTML Editor Capabilities.
   - **Using the Add/Edit Comments link**—Click Add/Edit Comments for a selected record on the details tab of a form that supports adding comments, i.e., select a work order record, and then click the Activities tab of the Work Orders form. The system displays the Comments page. Click on Add/Edit Comments. At the bottom of the page, the system expands the Add/Edit Comments section with HTML Editor Capabilities.

   **Note:** Set HTMLCOMM to ON to view the HTML Editor toolbar. Contact your system administrator for more information on installation parameters.

Crystal Clear Reports and Cognos Reports do not support HTML formatting. For Cognos Reports, the system will display comments as text without formatting.

The **Work Order Quick Close** and **Batch WO Update** forms do not support adding HTML formatted comments.

To access spell check functionality within the HTML Editor, download and install iSpell at [www.iespell.com](http://www.iespell.com).

2. **Language**—Select the language of the comment.

3. **Comments**—Enter the comments on the form.

   **Note:** Format comments using the HTML Editor toolbar.

4. **Print with Document**—Select to indicate that the comments print on the associated report.

5. Click **Save**.

   **Note:** To save a comment, click Save Record. The system saves the comment.

   To clear a comment, click **Clear Comment**.

   To delete a comment, click **Delete Comment**.

Modifying comments

Modify comments on records.

**Note:** The **Work Order Quick Close** form does not support modifying HTML formatted comments.

To modify comments:

1. From any form which supports comments, select the record for which to modify comments, and then choose one of the following options:
Using the Comments tab—Click the Comments tab. The system displays the Comments page. Click the comment to modify. At the bottom of the page, the system expands the Add/Edit Comments section with HTML Editor Capabilities.

Using the Add/Edit Comments link—Click Add/Edit Comments. The system displays the Comments page. Click Expand/Collapse on Add/Edit Comments. At the bottom of the page, the system expands the Add/Edit Comments section with HTML Editor Capabilities.

Note: To view or edit comments entered in another language, select the desired Language. The system displays that language’s Comments. If no comments were entered for the selected language, the system displays the comments for the user’s default language.

2 Modify the existing comments as necessary.
3 Click Save.

Note: On the Comments page, the system does not display a link for the original Created comment after the comment is modified. To preserve all comments, do not delete any previous comment text when modifying comments.

To save a comment, click Save Record.
To clear a comment, click Clear Comment.
To delete a comment, click Delete Comment.

Viewing audits for comments

View audits in order to monitor changes in comments.

To view audits for comments:

1 Open any entity form.
2 Select the record for which to view the audit.
3 Click the Comments tab.
4 Click View Audit Trail.
5 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. Contact your system administrator for more information.

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

6 Click Close.
Entering description translations

Enter description translations for languages. For example, when an asset is created, the description becomes the record’s description for every language. If the asset’s description is entered in English, it will appear in English to all users.

Use the Translations tab to translate the description into specific languages. This feature only applies to multilingual installations.

**Note:** When you update a description on the Record View page of any entity record, if that description has previously been translated, the translation becomes invalid and the system unselects Translated.

To enter description translations:

1. From any form associated with an entity, select the record you wish to translate, and then click the Translations tab.
2. Select the description to translate.
3. Translated Description—Enter the translated description for the language. The system automatically selects Translated.
4. Translated—Select to indicate that you have entered a translated description.
5. Click Submit.

Viewing electronic records and signatures

View electronic records and signatures for entities. The system stores information concerning snapshots and signatures, including the date and type of the snapshot or signature, name of the person who signed or updated the record, the type of the signature entered, and the new status of the record.

To view electronic records and signatures:

1. Open any form requiring electronic signatures for status changes.
2. Select the record for which to view the eRecord, and then click the eRecords tab.
3. View the snapshot and electronic signature information.

**Note:** You can also print the electronic records directly from the eRecords page. Click Print All eRecords to print all records in the list for that entity, or click Print Selected eRecord to print only a specific record for the entity.

Associating addresses

Associate mail, invoice, and delivery addresses with records and functions. Enter contact information such as address, telephone, fax, and e-mail address.

To associate addresses:
1 From any form associated with an entity, select the record with which to associate or edit the address, and then click the **Addresses** tab.

2 Click **Add Address**.

3 **Address Type**—Select one of the following options:
   - **Mail**—Select to create a mailing address.
   - **Invoice**—Select to create an invoice address.
   - **Delivery**—Select to create a delivery address.

4 Enter the appropriate contact information.

5 **Full Address**—Enter the full address as well as any comments.

6 Click **Submit**.

   **Note:** To delete an address, select the address to delete, and then click **Delete Address**.

---

**Associating parts**

Associate parts with records and functions. For example, associate specific parts to an asset, position, system, or location. You can also modify the quantity of an existing part or remove a part from the **Parts Associated** page.

**Note:** Define parts on the **Parts** form.

To associate parts:

1 From any form associated with an entity, select the record with which to associate parts, and then click the **Parts Associated** tab.

2 Click **Add Part**.

3 **Part**—Enter the part to associate with the record.
   
   The system automatically populates the part description, **Part Org.**, **Primary Manufacturer**, **Primary Manufacturer Part Number** and **Component Location**.

   **Note:** Click **Stock Info** to view stock information.
   
   Click **Substitutes** to view alternate part information.
   
   Click **Suppliers** to view supplier information for the part.
   
   Click **Manufacturers** to view manufacturer information.
   
   Click **Where Used** to view information on where the part is used.

4 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system automatically populates **Condition**.

5 **Quantity**—Enter the number of parts to associate with the record. This number must be greater than zero.

6 **Comments**—Enter additional comments as necessary.

7 Click **Submit**. The system updates the Parts Associated list.
Note: To remove a part, select the part to remove, and then click Remove Part. The system updates the Parts Associated list.

Dataspy

A Dataspy is a named, predefined view of a list of records or set of data that can be used on any page, lookup, or data area that contains that same list of records.

A Dataspy consists of the following four basic components:

- **Filter**—Contains the conditional statements that make up a filter. For example, a Dataspy might filter for all requisitions that have a Status "equal to" Approved, and a Creation Date "greater than" last Friday.

- **Sort**—Specifies the order in which the records should be sorted. For example, a Dataspy might sort the requisitions so that the most recently created requisitions are displayed at the top of the list in descending order.

- **Layout**—Specifies the fields that are displayed in the list and the order in which those fields should be displayed. For example, a Dataspy might specify that the Requisition Description column is displayed to the left of the Requisition Number column and that the Storeroom field is not displayed in the list.

- **Advanced**—Specifies an additional Where clause used for filtering data. The Where clause is appended to the Where clause generated by the Dataspy Filter.

Note: You can also specify column order by arranging the columns in a list view.

If a custom field saved in a Dataspy is ever unassociated, then that custom field will no longer appear in the Dataspy nor will it impact the Dataspy. If the same custom field is ever associated again, the relationship in the Dataspy will automatically be restored.

Editing an existing Dataspy

Edit the values in an existing Dataspy.

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

To edit an existing Dataspy:

1. On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click Edit.
   
   Note: You can select a different Dataspy name from the drop-down list on the Dataspy editor header.

2. Edit the Dataspy criteria as necessary.

   Note: Click Run to apply the Dataspy to the list without saving changes.
   Select Default Dataspy to save the selected Dataspy as the default.
3 Click Save. The system applies the Dataspy to the list view from which the Dataspy editor was launched.

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

## Creating and saving a new Dataspy

To create and save a new Dataspy:

1. Open an existing Dataspy from a list view, and then click **New**.
2. Enter a title for the Dataspy in the text box.
3. Edit the Dataspy criteria as necessary.

**Note:** Click Run to apply the Dataspy to the list without saving changes. Click **Cancel New** to cancel the creation of a new Dataspy and return to the previous view. Select **Default Dataspy** to save the selected Dataspy as the default.

**Note:** You can also press **ENTER** to display the records matching the filter criteria.

4. Click Save. The system applies the Dataspy to the list view from which the Dataspy editor was launched.

## Creating a copy of an existing Dataspy

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

To create a copy of an existing Dataspy:

1. On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2. Click **Copy**.
3. Modify the title for the Dataspy in the text box as necessary.
4. Edit the Dataspy criteria as necessary.

**Note:** Click **Cancel Copy** to cancel the creation of a new Dataspy and return to the previous view. Select **Default Dataspy** to save the selected Dataspy as the default.

5. Click **Save**. The system applies the Dataspy to the list view from which the Dataspy editor was launched.
Deleting a saved Dataspy

To delete a saved Dataspy:

1. On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2. Click **Delete**.
   
   **Note:** You can only delete Dataspies that you created.

Specifying Dataspy criteria

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

Specifying Dataspy filter criteria

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

To specify Dataspy filter criteria:

1. On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2. Click **Filter** from the left-hand column of the Dataspy editor.
3. Select a field on which to filter from the first drop-down list.
4. Select an operator from the second drop-down list. See the following table for operator options:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starts With</td>
<td>Search for items with a description that begins with the entered value.</td>
</tr>
<tr>
<td>Equals</td>
<td>Search for items with a value equal to the entered value.</td>
</tr>
<tr>
<td>Does Not Equal</td>
<td>Search for items with a description that does not equal the entered value.</td>
</tr>
<tr>
<td>Contains</td>
<td>Search for items with a description that contains the entered value.</td>
</tr>
<tr>
<td>Does Not Contain</td>
<td>Search for items with a description that does not contain the entered value.</td>
</tr>
<tr>
<td>Ends With</td>
<td>Search for items with a description that ends with the entered value.</td>
</tr>
</tbody>
</table>
**Operator** | **Definition**
---|---
Is Empty | Search for items with a description that has no entered value.
Is Not Empty | Search for items with a description that has any entered value.
Less Than | Search for items with a value less than the entered value.
Greater Than | Search for items with a value greater than the entered value.
Less Than or Equals | Search for items with a value less than or equal to the entered value.
Greater Than or Equals | Search for items with a value greater than or equal to the entered value.
Selected | Search for items where the checkbox is selected. This applies to checkbox fields only.
Not Selected | Search for items where the checkbox is not selected. This applies to checkbox fields only.

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

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

6 Click the **AND/OR** hyperlink to select one of the following join operators:
   - *Include records that include all joined conditions*—Select **AND**.
   - *Include records that contain one or the other condition*—Select **OR**.

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

8 Enter additional conditions by which to filter as necessary.

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

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

**Specifying Dataspy sort criteria**

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

To specify Dataspy sort criteria:

1 On any list view page, select the Dataspy to edit from the drop-down list on the filter bar, and then click **Edit**.
2 Click **Sort** from the left-hand column of the Dataspy editor.
3 **1st**—Select the first field by which to sort the records.

4 Click to select one of the following sort orders:
   - *Sort records either alphabetically or numerically by the selected field (ascending)*—Select **Sort Ascending**.
   - *Sort records in either reverse alphabetical or reverse numerical order by the selected field (descending)*—Select **Sort Descending**.

5 Enter additional fields by which to sort as necessary.

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

---

### Specifying Dataspy layout criteria

Select the columns to display when the Dataspy is applied to a list of records, and then specify the order in which the fields will be displayed.

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

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

To specify Dataspy layout criteria:

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

2 Click **Layout** from the left-hand column of the Dataspy editor.

3 **Available Fields** lists all fields that are available but not visible in the list of records, while **Visible Fields** lists all fields displayed as columns in the list of records.

4 See the following table when selecting or ordering fields:

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a field</td>
<td>Select the field in <strong>Available Fields</strong>, and then click <strong>Add a field</strong>.</td>
</tr>
<tr>
<td>Remove a field</td>
<td>Select the field in <strong>Visible Fields</strong>, and then click <strong>Remove a field</strong>.</td>
</tr>
<tr>
<td>Add all fields</td>
<td>Click <strong>Add all fields</strong>.</td>
</tr>
<tr>
<td>Remove all fields</td>
<td>Click <strong>Remove all fields</strong>.</td>
</tr>
</tbody>
</table>
Reorder fields

Select the field in **Visible Fields**, and then click either **Reorder up** or **Reorder down** to move the field up or down in the order.

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

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

7 Click **Save**.

**Specifying Dataspy advanced criteria**

To specify Dataspy advanced criteria:

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

2 Click **Advanced** from the left-hand column of the Dataspy editor.

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

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

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

**Hiding global Dataspies**

Choose to hide global Dataspies from selected user groups on specific screens or tabs.

To hide global Dataspies:

1 Open the **User Groups** form.

2 Select the user group for which to hide Dataspies, and then click the **Screen Permissions** tab.

3 Select the screen or tab for which to hide Dataspies, and then click **Hide Global Dataspies**. The system automatically populates **Dataspy Name** and **Global Default**.

4 **Hide Dataspy**—Select to hide specific Dataspies from the selected user group.

5 Click **Submit**.
Viewing the **Start Center**

View inbox entries, KPIs, and charts on the **Start Center** page.

To view the **Start Center**:

1. **Log in to Infor EAM.**
   - **Note:** To return to the **Start Center** from any other form, click **Start Center** on the header.

2. **View the Inbox, Chart Controls and KPIs sections.**
   - **Note:** The system automatically recalculates the values of inbox entries and the KPI data that have **Auto Refresh** activated when you open the **Start Center** page. To manually refresh the inbox entries and KPIs, click **Refresh**.

---

Understanding the **Start Center** inbox

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

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

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

Depending on your system privileges, you can also modify the inbox by adding and/or deleting entries. You can also modify the order and sequence in which entries are displayed.

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

For example, the system administrator sets up an inbox entry to approve work orders for your company’s maintenance manager. When the maintenance manager accesses the **Start Center**, the SQL statement defined for the work order approval inbox entry queries the system database and displays an inbox entry to approve work orders in the inbox. The inbox entry indicates that there are three outstanding work orders to approve. The maintenance manager calls the **Work Orders** form directly from the work order approval entry on the inbox by double-clicking, and the Dataspy defined for the screen automatically retrieves the three work orders requiring approval on the **Work Orders** form.

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

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

Specifying the default **Start Center** inbox tab

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

To specify the default **Start Center** Inbox tab:

1. Open the **Start Center** page.
2. Select the inbox tab to set as the default.
3. Click **Save as Default**.

Adding entries to the **Start Center** inbox

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

To add entries to the **Start Center** inbox:

1. Open the **Start Center** page.
2. Click **Personalize**.
3. Click **Insert Inbox Entry**.
4. **Sequence Number**—Enter the sequence in which the inbox entry will be displayed in the inbox.
5. **Inbox Code**—Enter the inbox entry to add to the inbox. The system automatically populates the inbox description.
6. **Folder**—Select the folder on which to place the inbox entry.
7. **Auto Refresh**—Select to enable the system to automatically refresh the inbox every time the **Start Center** is invoked.
8. Click **Submit**.
9. Click **Close**.

Modifying the sequence of inbox entries

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

To modify the sequence of inbox entries:

1. Open the **Start Center** page.
2. Click **Personalize**.
Select the inbox entry for which to modify the display sequence, and then enter a new value for Sequence Number.

Click Submit.

Click Close.

Accessing screens from the Start Center inbox

Access screens associated with inbox entries directly from the inbox.

To access screens from the Start Center inbox:

1. Open the Start Center page.
2. Locate the inbox entry for which to call a screen, and then double-click the entry.

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

Understanding the Start Center KPIs

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

The system administrator defines and grants access to the KPIs. KPIs can either be user-group specific or public. Public KPIs can be displayed for all users.

Access KPIs on the Start Center or have the system administrator set up the Start Center to open automatically when you log on to Infor EAM. Depending on system privileges, you can configure the Start Center to display KPIs based on your preferences.

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

Setting up the Start Center KPIs

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

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

To add KPIs to the **Start Center**:

1. Open the **Start Center** page.
2. Click **Personalize**.
3. Click **Insert KPI Entry**.
4. **Sequence Number**—Enter the sequence in which the KPI will be displayed in the **Start Center**.
5. **KPI Code**—Enter the KPI to add to the **Start Center**. The system automatically populates the KPI description.
6. **Auto Refresh**—Select to enable the system to automatically refresh the KPI every time the **Start Center** is invoked.
7. Click **Submit**.
8. Click **Close**.

Modifying the sequence of KPIs

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

To modify the sequence of KPIs:

1. Open the **Start Center** page.
2. Click **Personalize**.
3. Select the KPI for which to modify the display sequence, and then enter the new value for **Sequence Number**.
4. Click **Submit**.
5. Click **Close**.

Accessing screens from **Start Center** KPIs

Access screens associated with KPIs directly from the **Start Center**.

To access screens from **Start Center** KPIs:

1. Open the **Start Center** page.
2. Locate the KPI entry for which to call a screen, and then double-click the entry. The system calls the screen.
   
   A parent arrow in the KPI entry title indicates that the entry is a parent KPI. The arrow only appears when children have been added to the parent. The arrow does not automatically appear by selecting **Parent** during KPI setup.
   
   To access the children KPIs, click the parent arrow. The system refreshes the KPIs and displays all children KPIs. Double-click the child KPI for which to call a screen. The system calls the screen.
Note: The system automatically queries for and retrieves the records associated with the KPI entry to the called screen if you defined a Dataspy for the called screen when defining the KPI entry.

Managing your account

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

Note: If you change your user password and have any report schedules in Infor EAM Advanced Reporting, you must renew your credentials in Infor EAM Advanced Reporting. Contact your system administrator for more information.

To manage your account:

1. Click MY ACCOUNT on the header.
2. Success Msg. Timeout—Select the timeframe for which you want the message bar to display success messages.
3. E-mail—Enter a new e-mail address as necessary.
4. Language—Select the language to use for your account.
   Note: If you modify Success Msg. Timeout or Language, you must log out, close all browser sessions, and then log in to see the changes.
5. Current Password—Enter the password you used to log in.
6. New Password—Enter the new password.
7. Confirm Password—Re-enter the new password.
   Note: If LDAP is enabled, the Current Password, New Password, and Confirm Password fields are not displayed.
8. Click Save Record.
Asset management

The equipment module controls the organization and use of material equipment. Track equipment and their associated costs by defining them as assets, positions, systems, or locations; create equipment profiles to use as templates when defining new equipment records, and place equipment in hierarchical relationships. Define equipment records as vehicles, linear equipment, and/or VMRS equipment to thoroughly track information pertinent to each distinct equipment record.

In addition, define meter information, and then associate a logical meter with a piece of equipment. Meter readings allow you to track equipment usage and more effectively manage preventive maintenance.

Manage equipment warranties, file claims when necessary, and schedule preventive maintenance to safeguard against costly equipment failures. Finally, track the value of your equipment's depreciation expense.

Understanding equipment

Pieces of equipment are entities for which you store data and create work orders. Equipment can be of many different types, but the four main types are locations, systems, positions, and assets.

- **Locations** — Physical locations of systems, positions, and assets. For example, a pumping system is located in Room 104.

- **Systems** — Collections of positions and/or assets that work together so that when one part goes down, all parts are affected. For example, if a pump stops working, you must turn off the entire water line to repair it.

- **Positions** — Functions performed by a general kind of asset. For example, the pump that moves water from one tank to another is a functional position, which can be filled by any number of actual, physical pumps (assets). Positions are also called "functional positions."

- **Assets** — Generally, physical objects. Assets are the base unit of equipment information and the smallest tracking unit for capital investments.

Locations, systems, positions, and assets form a hierarchy of equipment information, with locations at the top of the hierarchy and assets at the bottom. Data is shared among the levels of the equipment hierarchy. For example, data for a work order performed on an asset is also stored in the position, system, and location equipment to which the asset belongs. This data sharing allows you to track assets
and their performance in detail and under differing conditions, to evaluate the performance of entire systems, and to assess the effect that locations and positions have on systems and assets.

For example, you might have a pump (PU-9476-96) working in a functional position (PUMP-03) in a system on the first floor (FLOOR-01). The pump fails, and you remove it from the system to repair it and place another pump (PU-4854-93) in that position. The work order data for the failed pump is stored not only with the pump equipment (PU-9476-96) but also with the position equipment (PUMP-03) and the location equipment (FLOOR-01). When the pump is repaired, you place it in a different functional position (PUMP-02) on the second floor (FLOOR-02). After the pump is in that position for a while, you can compare

- the performance of PU-9476-96 to the performance of PU-4854-93 in position PUMP-03 in location FLOOR-01 and
- the performance of PU-9476-96 in position PUMP-03 at location FLOOR-01 to its performance in position PUMP-02 at location FLOOR-02.

Setting up initial equipment information

Set up initial equipment information before using the equipment module.

Setting up equipment categories

Categories provide a way to further organize pieces of equipment. For example, if a class is defined for motors, create a category for motor types and sizes.

**Note:** If you created custom attributes for equipment classes, those attributes roll down to the category level and are visible in the Custom Fields section of the Record View page.

To set up equipment categories:

1. Open the Categories form.
2. Click New Record.
3. **Category**—Enter a unique code identifying the category, and then enter a description of the category in the adjacent field.
4. **Equipment Class**—Enter the equipment class of the category.
5. **Manufacturer**—Enter the manufacturer.
6. Click Save Record.

Setting up closing codes

The system contains four types of closing codes—action codes, cause codes, failure codes, and problem codes. Action codes describe the steps necessary to correct the problem (e.g., add lubricant
to a pump). Cause codes identify what caused the component or type of component to fail, i.e., the root cause of the problem. Failure codes identify the reason the equipment failed. Finally, problem codes identify the observed equipment failure (e.g., a leak from a faucet or the overheating of a pump).

To set up closing codes:

1. Open the Closing Codes form.
2. Click New Record.
3. Closing Code—Enter the name of the closing code, and then enter a description of the closing code in the adjacent field.
4. Type—Select the type of closing code.
5. Group—Enter the group to which to associate the closing code. This closing code will display in a tree of closing codes in lookups grouped as selected.
6. Out of Service—Select to mark the closing code out of service so that the closing code won't display in lookups.
7. Valid for all Equipment Classes—Select to make the closing code available to associate with any equipment regardless of the class defined for the equipment. General closing codes apply to general terms. See “Associating closing codes with classes” on page 79.
   
   **Note:** If classes have been created for the closing code, you cannot select General.

8. Enable for Work Orders—Select to display this closing codes for work orders.
9. Enable for Part Failures—Select to display this closing code for part failures.
10. Click Save Record.

**Associating closing codes with classes**

Associate closing codes with classes, e.g., equipment with a class of HVAC can have different closing codes than equipment with a class of MOTOR. A closing code can be associated with multiple classes.

**Note:** You cannot associate classes with general closing codes.

To associate closing codes with classes:

1. Open the Closing Codes form.
2. Select the closing code with which to associate classes, and then click the Classes tab.
3. Click Add Class.
4. Class—Enter the class to associate with the closing code. The system automatically populates the class description and Class Org.
5. Click Submit.

**Defining closing code hierarchies**

Define parent/child hierarchy details for closing codes.

To define closing code hierarchies:
1. Open the **Closing Code Hierarchy** form.
2. Click **Add Relationship**.
3. **Parent Closing Code**—Enter the parent closing code. The system automatically populates the parent description and **Parent Type**.
4. **Child Closing Code**—Enter the child closing code. The system automatically populates the child description and **Child Type**.
5. **Equipment**—Enter the equipment to which to associate the closing code hierarchy. The system automatically populates **Equipment Org**.
6. Click **Submit**.

**Setting up departments**

A department is the center or area that is responsible for the maintenance of equipment, such as an asset, a position, a system, or a location. The department coordinates the work, assigns the appropriate crew, plans the work, and approves respective work orders.

When defining equipment, assign it to a department. The department can be modified if needed on work orders. When creating work orders (for maintenance or repairs to equipment), the system rolls up the associated costs to the department of the work order. Set up a default store for each department as well as a default supervisor. When reserving parts for a work order, the system stores them in the specified store.

**Note:** You cannot delete departments if they have already been used elsewhere in the system.

To set up departments:

1. Open the **Departments** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the department belongs if you use multi-organization security.
4. **Department**—Enter a unique code identifying the department, and then enter a description of the department in the adjacent field.
5. **Class**—Enter the class of the department.
6. **Screener**—Enter the user responsible for screening work requests for the department.
7. **Default Supervisor**—Enter the supervisor of the department.
8. **Account Segment Value**—Enter the general ledger account code segment that represents the department in your accounting structure. See your chart of accounts for more information.
9. **Default Store**—Enter the store of the department.
10. **Out of Service**—Select to indicate the department is no longer in use.
11. Click **Save Record**.
Associating tools with departments

Associate tools with departments for scheduling purposes. Once you have associated a tool with a department, the system allows you to schedule the tool on a work order for the department.

To associate tools with departments:

1. Open the Departments form.
2. Select the department with which to associate a tool, and then click the Tools tab.
3. Click Add Tool.
4. Organization—Enter the organization to which the tool belongs if you use multi-organization security.
5. Tool—Enter the tool to associate with the department. The system automatically populates Tool Org.
6. Quantity—Enter the available quantity of the tool.
7. Rate—Enter the hourly rate for the tool.
8. Hours—Enter the number of hours the tool is available.
9. Currency—The system displays the base currency of the organization.
10. Click Submit.

Setting up warranties

Define warranty documents to set up supplier and/or manufacturer information for the warranty and enter general warranty information. Specify the duration of the warranty and the percentages indicating how much the warranty covers for different material and labor expenses.

You may view documents previously associated with the warranty. Click View Document to open and view the document.

To set up warranties:

1. Open the Warranties form.
2. Click New Record.
3. Organization—Enter the organization to which the warranty belongs if you use multi-organization security.
4. Warranty—Enter a unique code identifying the warranty, and then enter a description of the warranty in the adjacent field.
5. Class—Enter the class of the warranty.
6. Manufacturer—Enter the manufacturer if the document is a manufacturer’s warranty for equipment or parts.
7. Supplier—Enter the supplier if the document is a supplier’s warranty for equipment or parts. The system automatically populates Supplier Org.
8. Start Date—Enter the start date of the warranty.
9. Expiration Date—Enter the expiration date of the warranty.
10. Class—Enter the class of the warranty. The system automatically populates Class Org.
11 **Duration**—Enter the duration in days of the warranty.
12 **Renewal Threshold**—Enter the renewal threshold for the warranty.
13 **File**—Enter the file name of the document.
14 **File Type**—Enter the type of the file, e.g., word document, spreadsheet, etc.
15 **Revision Number**—Enter the revision number of the document, e.g., if you have updated the document since the document was entered in Infor EAM, enter 1.
16 **Revision Date**—Enter the date of the latest document revision.
17 **Original Code**—Enter the code defined by the originator.
18 **File Location**—Enter the location where the document is stored.
19 **Pages**—Enter the number of pages in the document.
20 **Labor %**—Enter the percentage of labor costs covered by this warranty.
21 **Hired Labor %**—Enter the percentage of hired labor costs covered by this warranty.
22 **Services %**—Enter the percentage of service costs covered by this warranty.
23 **Stock Items %**—Enter the percentage of stock material costs covered by this warranty.
24 **Direct Purchases %**—Enter the percentage of direct purchase material costs covered by this warranty.
25 **Tools %**—Enter the percentage of tool costs covered by this warranty.
26 Click **Save Record**.

**Associating VMRS codes with warranties**

Associate VMRS codes with warranties to track warranty information for vehicle components. If you do not associate any VMRS codes with a warranty, the warranty covers all components of referenced vehicles.

The system allows you to associate multiple VMRS codes with each warranty.

Define VMRS codes before associating them with warranties. See "Defining VMRS codes" on page 380.

To associate VMRS codes with warranties:

1 Open the **Warranties** form.
2 Select the warranty with which to associate VMRS codes, and then click the **VMRS Codes** tab.
3 Click **Add VMRS Code**.
4 **System Level**—Enter the VMRS code identifying the system associated with the vehicle.
5 **Assembly Level**—Enter the VMRS code identifying the assembly associated with the vehicle.

**Note:** You cannot enter an **Assembly Level** unless you entered a **System Level**.

6 **Component Level**—Enter the VMRS code identifying the component associated with the vehicle. The system automatically populates **Description** based on the **System Level**, **Assembly Level**, and **Component Level** combination.

**Note:** You cannot enter a **Component Level** unless you entered an **Assembly Level**.
Creating equipment profiles

Create equipment profiles to use as equipment templates. After creating a profile, use it to quickly create equipment records that require the same information as is contained on the profile.

To create equipment profiles:

1. Open the Profiles form.
2. Click New Record.
3. Organization—Enter the organization to which the profile belongs if you use multi-organization security.
4. Profile—Enter a unique code identifying the profile, and then enter a description of the profile in the adjacent field.
5. Department—Enter the department of the equipment to define with this profile.
6. Type—Select the type of equipment to define with this profile.
7. Status—Select the status of the equipment to define with this profile.
8. Class—Enter the class of the equipment to define with this profile.
   
   Note: If you enter a Class, the system displays any custom fields associated with that class.
9. Category—Enter the category of the equipment to define with this profile. The system automatically populates Manufacturer and custom fields based on the information you entered on the Categories form.
10. GIS Profile—Select to flag the profile as a GIS profile.
    
    Note: Once you create a GIS profile, associate it with a GIS layer. See "Defining preferences for the creation of Infor EAM equipment (ESRI)" in Chapter 6 GIS Integration of the System Administrator's Guide. GIS and Infor EAM use the GIS profile and layer information to create equipment records in the respective systems.
11. Equipment Value—Enter the value of the equipment to define with this profile.
12. Meter Unit—Enter the meter unit of the equipment to define with this profile.
13. Manufacturer—Enter the manufacturer of the equipment to define with this profile.
14. Revision—Enter the revision of the equipment to define with this profile.
15. Model—Enter the model of the equipment to define with this profile.
16. Part—Enter the part code of the equipment to define with this profile. The system automatically populates Part Org.
17. Store—Enter the store of the equipment to define with this profile.
18. Variable 1, Variable 2, Variable 3, Variable 4, Variable 5, and Variable 6—Enter any additional information to be included on the equipment to define with this profile.
19. Click Save Record.
Defining equipment

Define your organization’s assets, positions, systems, and locations as equipment.

**Note:** You can only delete equipment records that do not have histories or other associated records.

If you have purchased the GIS integration, automatically define ESRI GIS features as you define Infor EAM assets, positions, or systems. See *Defining GIS features (Infor EAM)* Chapter 10 GIS integration.

In addition, view equipment on a GIS map from the Assets, Positions, or Systems forms. See *Viewing GIS maps from equipment records (Infor EAM)* in Chapter 10 GIS integration for more information.

As you define an equipment record, specify that it is subject to the United States Food and Drug Administration (FDA) Current Good Manufacturing Practices (cGMP) standards as necessary. Depending on your system configuration, the system creates electronic records and/or requires signatures for any work performed on cGMP equipment. Contact your system administrator for more information.

Create a large number of identical equipment records quickly with equipment profiles. See "Defining equipment using profiles" on page 97.

Define linear equipment records for equipment that spans a length of space, e.g., a bridge. See "Defining linear equipment" on page 96.

Define Vehicle Maintenance Reporting System (VMRS) equipment as necessary. See "Defining VMRS equipment" on page 97.

Define equipment before associating parts or permits with that equipment or before setting up parent/child relationships. See "Defining equipment hierarchies" on page 106.

**Note:** When the selected equipment is dependent on a parent, the equipment inherits its location from that parent. Equipment cannot be dependent on more than one parent.

When equipment is directly associated with a location, the relationship is automatically a dependent one.

Multiple system parents can exist for assets, positions, and systems; therefore, this relationship cannot be established or maintained on the **Record View** pages of these forms.

Because equipment records are central to all functionality, the system allows you to perform a number of functions directly from the Assets, Positions, or Systems forms. Right-click to access the functionality. See the following table, which displays the functionality available from the Assets, Positions, and Systems forms and directs you to the section and chapter within this guide that provides instructions for use:

<table>
<thead>
<tr>
<th>Right-Click Option</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create GIS Feature</td>
<td>&quot;Defining GIS features (Infor EAM)&quot; on page 710</td>
</tr>
<tr>
<td>View GIS Map</td>
<td>&quot;Viewing GIS maps from equipment records (Infor EAM)&quot; on page 738</td>
</tr>
<tr>
<td>View GIS Attributes</td>
<td>&quot;Identifying features (Infor EAM)&quot; on page 730</td>
</tr>
<tr>
<td>Create WO</td>
<td>&quot;Defining regular work order headers&quot; on page 389 and &quot;Defining regular work order activities&quot; on page 393</td>
</tr>
</tbody>
</table>
Defining assets

Define your organization’s assets as equipment.

**Note:** The installation parameter ASSETASS determines whether assets are recognized at purchase order creation or upon receipt. See "Defining installation parameters".

To define assets:

1. Open the **Assets** form.
2. Click **New Record**. The system automatically populates **Type**, **Status**, **Production**, **Commission Date**, and **State** if available.
3. **Organization**—Enter the organization to which the asset belongs if you use multi-organization security.
4. **Asset**—Enter a unique code identifying the asset, and then enter a description of the asset in the adjacent field.
   **Note:** If the AUTOANUM installation parameter is set to YES, the system automatically assigns the asset number if the **Asset** code is not entered.
5. **Department**—Enter the asset’s department. The system automatically populates **GIS ID**, **Layer**, **Location X**, **Location Y**, **Map**, and **Map Org.**
6. **Type**—Select the equipment type.
7. **Status**—Select the asset status. See the following list for default status values:
   - **Awaiting purchase**—Interacts with the purchasing module. If assets are recognized at purchase order creation, then an asset must be created at time of purchase order generation. The ASSETASS installation parameter determines when assets are recognized: at receipt (R) or at purchase order creation (P).
   - **In store**—Reserved for new assets received into a firm’s store. Select the **Status** value **In store** only when defining an asset in the inventory store.
   - **Installed**—Assigned when an asset is in place and operating within the business organization.
   - **Withdrawn**—Assigned when an asset is no longer available for use. This status is not available during initial asset creation. The system automatically populates **Withdrawal Date**.
8. **Class**—Enter the class of the asset.
9. **Category**—Enter the asset’s category.
Note: If you enter a category for which calibration data has been defined, the system copies the calibration and test point data to the asset.

10 Profile—Enter the profile on which to base this equipment record.

11 Cost Code—Enter the asset’s cost code.

12 Production—Select if the asset is used in production.

13 Safety—Select to observe safety precautions when working with this asset.

14 Out of Service—Select if the asset is not used.

15 Prevent WO Completion—Select to indicate that work orders for this asset should not be closed.

16 System Level, Assembly Level, and Component Level—Enter the VMRS codes identifying the system, assembly, and component associated with the vehicle. The system automatically populates VMRS Description.

17 Commission Date—Enter the asset’s installation date.

Note: The Commission Date defaults to the current date when you create an asset.

18 Equipment Value—Enter the asset’s value (generally, purchase price).

19 Assigned To—Enter the person responsible for the asset.

20 Meter Unit—Enter the asset’s primary unit of measure.

21 Criticality—Enter a criticality code to indicate the relative importance of the asset to the overall production of goods or services for your organization.

Note: Criticality proceeds to work orders when the asset requires maintenance.

22 State—Select the state of the asset.

Note: If you select CN pending, CN In Process, or CN Completed, the system requires a value for Change Notice be entered. If you select Good or Defective, the system clears Change Notice.

23 Withdrawal Date—Enter the date on which the equipment is withdrawn from service.

24 Change Notice—Enter the change notice for the asset.

Note: If you enter or change the value for Change Notice, the system will change State to CN Pending if State is not populated. If you clear Change Notice, the State changes to Good.

25 cGMP—Select to indicate that the equipment is subject to cGMP standards.

26 Dormant Start—Enter the date on which the dormant period for any PM work orders for the equipment begins.

27 Dormant End—Enter the date on which the dormant period for any PM work orders for the equipment ends.

28 Reuse Dormant Period—Select to use the same specified dormant period for any PM work orders for the equipment on an annual basis.

29 Track Resources—Select to track the resources directly related to this equipment.

30 Sold/Scrap Date—Enter the date on which the asset is sold or scrapped.

31 Manufacturer—Enter the asset’s manufacturer.

32 Serial Number—Enter the asset’s serial number.

33 Model—Enter the asset’s model number.
34 **Revision**—Enter the manufacturer’s revision number.

35 **Part**—Enter the equipment’s part number.

   **Note:** Only enter parts that are tracked by asset.

36 **Store**—Enter the store in which the asset is stocked.

   **Note:** You can enter a **Store** and **Bin** only if the equipment’s **Status** is **Awaiting purchase** or **In store**.

37 **Bin**—Enter the bin storing the asset.

38 **Lot**—Enter the lot number, or batch, of the part.

39 **Variable 1, Variable 2, Variable 3, Variable 4, Variable 5, and Variable 6**—Enter any additional information to be included on this asset record.

40 **Vehicle**—Select if the asset is a vehicle.

41 **Fleet Customer**—Enter the fleet customer with which to associate the asset. The system automatically populates **Fleet Customer Org**.

42 **Billing Code**—Enter the billing code with which to associate the asset. The system automatically populates **Billing Code Org**.

43 **Markup Code**—Enter the markup code with which to associate the asset. The system automatically populates **Markup Code Org**.

   **Note:** If a **Billing Code** and/or a **Markup Code** are associated directly to the asset, the ticketing process will always assign these codes to the ticket, regardless of the **Billing Codes** associated with the fleet customer on the **Billing Codes** form.

   The **Vehicle Status** must be Available to be issued via a ticket.

   The **Fleet Customer, Cost Code, Vehicle Status, and Issued To** values should be controlled primarily through the ticketing process for vehicles. See "Fleet management" on page 743.

44 **Vehicle Status**—Select the status of the vehicle. Enter the following Call Center Details:

45 **Calendar Group**—Enter the calendar group for the asset. The system automatically populates **Calendar Group Org**.

46 **Penalty Factor**—Enter the penalty factor for the asset.

47 **Service Delivery Matrix**—Select to restrict work orders for this equipment to a pre-defined service delivery matrix.

   **Note:** **Service Delivery Matrix** must be selected for **Service Problem Code Validation** on the **Call Center Setup** form.

48 **Minimum Deduction/Currency**—Enter the minimum deduction allowed.

49 **Parent Asset**—Enter the parent asset.

50 **Dependent**—Select if the asset is dependent on the parent asset.

51 **Cost Roll-up**—Select if costs should roll up to the parent asset.

52 **Position**—Enter the position of the asset.

53 **Dependent**—Select if the asset is dependent on the position.

54 **Cost Roll-up**—Select if costs should roll up to the position.

55 **Location**—Enter the location of the asset.
56 Equipment Length, Equip. Length UOM, Linear Ref. UOM, Ref. Precision, and Geographical Ref.—Enter the linear equipment information. Enter the following Facility Condition Index (FCI) Details:

**Note**: The values of the FCI details should be entered based on the planning budget and investment figures from a third party audit.

57 Cost of Needed Repairs—Enter the cost of necessary repairs. The system automatically populates the currency, and defaults Eligible for Energy Star Label to unselected.

58 Replacement Value—Enter the current replacement value for the equipment. The system automatically populates the currency.

59 Facility Condition Index—Enter the resultant FCI based on the maintenance details. \( \text{Cost of Needed Repairs/Current Replacement Value}=\text{FCI} \)

60 Utility Bill Level—Select to mark the asset as having capabilities to record utility bills.

61 GAS Tracked—Select to set the equipment as GAS (Global Asset Sustainability) Tracked.

**Note**: If data exists on the Design Consumption or Actual Consumption forms, the equipment must remain as GAS Tracked.

62 Floor Area—Enter the floor area, and then enter the unit of measure for the floor area.

63 Estimated Revenue—Enter the estimated revenue the piece of equipment can generate.

64 Region—Enter the region for the equipment. The system automatically populates Region Org.

65 Primary Use—Enter the primary use for the equipment.

66 Year Built—Enter the year built for the equipment.

67 Service Life (years)—Enter the service life of the equipment.

68 Lock Reliability Ranking Values—Select to lock the reliability ranking values for the equipment on the Reliability Survey tab of the Equipment screen.

**Note**: If Lock Reliability Ranking Values is selected, the system will not allow the user to modify the reliability survey answers and calculate reliability ranking values for the equipment. The system also prevents the selection of equipment for update on the Batch Update Reliability Ranking Values form.

69 Reliability Ranking—Enter the reliability ranking code for the equipment. The system automatically populates Reliability Ranking Index, Reliability Ranking Score, Reliability Ranking Values Out of Sync, Reliability Ranking Values Last Calculated, Reliability Survey Last Updated, and Reliability Ranking Setup Last Updated, after answering the reliability survey.

70 Target Power Factor—Enter the target power factor that has been determined for the asset.

71 Target Peak Demand (W)—Enter the target peak demand in watts for the asset.

72 Start Billing Period—Enter the date that the billing period begins. The Peak Demand measurements are relevant after this date.

**Note**: The Peak Demand alert will update this field based on the specified Bill Every, but manual changes may be required depending on the actual utility invoices received.

73 Bill Every—Enter the length of the interval of time to pass before the system expects the next bill, and then select the unit of measure in the adjacent field.

74 Eff. Loss 1% Phase Imb.—Enter the efficiency loss per 1 percent imbalance.
75 **Eff. Loss 2% Phase Imb.**—Enter the efficiency loss per 2 percent imbalance.

76 **Eff. Loss 3% Phase Imb.**—Enter the efficiency loss per 3 percent imbalance.

77 **Eff. Loss 4% Phase Imb.**—Enter the efficiency loss per 4 percent imbalance.

78 **Eff. Loss 5% Phase Imb.**—Enter the efficiency loss per 5 percent imbalance.

79 **Performance Manager**—Enter the energy performance manager who is responsible for the equipment.

80 **Electric Sub-meter Interval**—Enter the length of the interval of time in minutes indicating how frequently the electric sub-meter is read.

81 **Electric Usage Threshold**—Enter the current in amps above which the equipment is considered running (on).

82 Click **Save Record**. If a review has been performed on the **Safety** tab, the system automatically populates **Safety Date Review Required** and **Safety Reviewed By**. If a review has been performed on the **Permits** tab, the system automatically populates **Permit Date Review Required** and **Permit Reviewed By**. If a review has been performed on the **LOTO** tab, the system automatically populates **LOTO Date Review Required** and **LOTO Reviewed By**. The system automatically populates **Equipment Configuration**, **Equipment Configuration Org.**, and **Equipment Configuration Revision**.

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**Defining positions**

Define your organization’s functional positions as equipment.

To define positions:

1. Open the **Positions** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the position belongs if you use multi-organization security. The system automatically populates **Transfer Date** and **Org**.
4. **Position**—Enter a unique code identifying the position, and then enter a description of the position in the adjacent field.
   
   **Note**: If the AUTOANUM installation parameter is set to YES, the system automatically assigns the position number if the **Position** code is not entered.
5. **Department**—Enter the position’s department. The system automatically populates **GIS ID**, **Layer**, **Location X**, **Location Y**, **Map**, and **Map Org**.
6. **Type**—Select the equipment type.
7. **Status**—The system defaults **Status** to Installed; this value cannot be changed. Enter the following Equipment Details:
8. **Class**—Enter the class of the position.
9. **Category**—Enter the position’s category.
   
   **Note**: If you enter a category for which calibration data has been defined, the system copies the calibration and test point data to the position.
10 **Cost Code**—Enter the position’s cost code.

11 **Production**—Select if the position is used in production.

12 **Safety**—Select to observe safety precautions when working with this position.

13 **Profile**—Enter the profile on which to base this equipment record.

14 **Out of Service**—Select if the position is not used.

15 **Prevent WO Completion**—Select to indicate that work orders for this position should not be closed.

16 **System Level, Assembly Level, and Component Level**—Enter the VMRS codes identifying the system, assembly, and component associated with the vehicle. The system automatically populates **VMRS Description**.

17 **Commission Date**—Enter the installation date for the position.

    **Note:** The **Commission Date** defaults to the current date when you create a position.

18 **Assigned To**—Enter the person responsible for the position.

19 **Meter Unit**—Enter the position’s primary unit of measure.

20 **Criticality**—Enter a criticality code to indicate the relative importance of the position to the overall production of goods or services for your organization.

21 **cGMP**—Select to indicate that the equipment is subject to cGMP standards.

22 **Dormant Start**—Enter the date on which the dormant period for any PM work orders for the equipment begins.

23 **Dormant End**—Enter the date on which the dormant period for any PM work orders for the equipment ends.

24 **Reuse Dormant Period**—Select to use the same specified dormant period for any PM work orders for the equipment on an annual basis.

25 **Track Resources**—Select to track the resources directly related to this position.

26 **Sold/Scrap Date**—Enter the date on which the asset is sold or scrapped. Enter the following Tracking Details:

27 **Manufacturer**—Enter the manufacturer of the position.

28 **Serial Number**—Enter the serial number of the position.

29 **Model**—Enter the model of the position.

30 **Revision**—Enter the revision of the position. Enter the following Variables:

31 **Variable 1, Variable 2, Variable 3, Variable 4, Variable 5, and Variable 6**—Enter the variables of the position. Enter the following Call Center Details:

32 **Calendar Group**—Enter the calendar group for the position. The system automatically populates **Calendar Group Org**.

33 **Penalty Factor**—Enter the penalty factor for the position.

34 **Minimum Deduction/Currency**—Enter the minimum deduction allowed. Enter the following Hierarchy details:

35 **Asset**—Enter the asset for the position.

36 **Dependent**—Select if the position is dependent upon the Asset.

37 **Cost Roll-up**—Select if costs should roll up to the Asset.

38 **Location**—Enter the location of the position.
39 **Parent Position**—Enter the parent position.

40 **Dependent**—Select if the position is dependent upon the Parent Position

41 **Cost Roll-up**—Select if costs should roll up to the Parent Position. Enter the following Linear Reference Details.

42 **Equipment Length, Equip. Length UOM, Linear Ref. UOM, Ref. Precision, and Geographical Ref.**—Enter the linear equipment information. Enter the following Facility Condition Index (FCI) Details:

   **Note:** The values of the FCI details should be entered based on the planning budget and investment figures from a third party audit.

43 **Cost of Needed Repairs**—Enter the cost of necessary repairs. The system automatically populates the currency.

44 **Replacement Value**—Enter the current replacement value for the equipment. The system automatically populates the currency.

45 **Facility Condition Index**—Enter the resultant FCI based on the maintenance details. Cost of Needed Repairs/Current Replacement Value=FCI

46 **Utility Bill Level**—Select to mark the asset as having capabilities to record utility bills.

47 **GAS Tracked**—Select to set the equipment as GAS (Global Asset Sustainability) Tracked.

   **Note:** If data exists on the **Design Consumption** or **Actual Consumption** forms, the equipment must remain as GAS Tracked.

48 **Facility**—Select this checkbox to add the facility record in the ENX Suite list of facilities.

   **Note:** Facility is available for Oracle installations only.

49 **Floor Area**—Enter the floor area, and then enter the unit of measure for the floor area.

50 **Estimated Revenue**—Enter the estimated revenue the piece of equipment can generate.

51 **Region**—Enter the region for the equipment. The system automatically populates Region Org.

52 **Country**—Select the country.

   **Note:** Country is available for Oracle installations only.

53 **Primary Use**—Enter the primary use for the equipment.

54 **Year Built**—Enter the year built for the equipment.

55 **Service Life (years)**—Enter the service life of the equipment.

56 **Lock Reliability Ranking Values**—Select to lock the reliability ranking values for the equipment on the Reliability Survey tab of the Equipment screen.

   **Note:** If **Lock Reliability Ranking Values** is selected, the system will not allow the user to modify the reliability survey answers and calculate reliability ranking values for the equipment. The system also prevents the selection of equipment for update on the **Batch Update Reliability Ranking Values** form.

57 **Reliability Ranking**—Enter the reliability ranking code for the equipment. The system automatically populates Reliability Ranking Index, Reliability Ranking Score, Reliability Ranking Values Out of Sync, Reliability Ranking Values Last Calculated, Reliability Survey Last Updated, and Reliability Ranking Setup Last Updated, after answering the reliability survey.
58 **Target Power Factor**—Enter the target power factor that has been determined for the asset.

59 **Target Peak Demand (W)**—Enter the target peak demand in watts for the asset.

60 **Start Billing Period**—Enter the date that the billing period begins. The Peak Demand measurements are relevant after this date.

   **Note:** The Peak Demand alert will update this field based on the specified **Bill Every**, but manual changes may be required depending on the actual utility invoices received.

61 **Bill Every**—Enter the length of the interval of time to pass before the system expects the next bill, and then select the unit of measure in the adjacent field.

62 **Eff. Loss 1% Phase Imb.**—Enter the efficiency loss per 1 percent imbalance.

63 **Eff. Loss 2% Phase Imb.**—Enter the efficiency loss per 2 percent imbalance.

64 **Eff. Loss 3% Phase Imb.**—Enter the efficiency loss per 3 percent imbalance.

65 **Eff. Loss 4% Phase Imb.**—Enter the efficiency loss per 4 percent imbalance.

66 **Eff. Loss 5% Phase Imb.**—Enter the efficiency loss per 5 percent imbalance.

67 **Performance Manager**—Enter the energy performance manager who is responsible for the equipment.

68 **Electric Sub-meter Interval**—Enter the length of the interval of time in minutes indicating how frequently the electric sub-meter is read.

69 **Electric Usage Threshold**—Enter the current in amps above which the equipment is considered running (on).

70 Click **Save Record**. If a review has been performed on the **Safety** tab, the system automatically populates **Safety Date Review Required** and **Safety Reviewed By**. If a review has been performed on the **Permits** tab, the system automatically populates **Permit Date Review Required** and **Permit Reviewed By**. If a review has been performed on the **LOTO** tab, the system automatically populates **LOTO Date Review Required** and **LOTO Reviewed By**. The system automatically populates **Equipment Configuration**, **Equipment Configuration Org.**, and **Equipment Configuration Revision**.

   **Note:** Click **Linear Equipment Search** to locate linear equipment for the selected position.

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**Defining systems**

Define your organization’s systems as equipment.

To define systems:

1 Open the **Systems** form.

2 Click **New Record**.

3 **Organization**—Enter the organization to which the system belongs if you use multi-organization security.

4 **System**—Enter a unique code identifying the system, and then enter a description of the system in the adjacent field.
Note: If the AUTOANUM installation parameter is set to YES, the system automatically assigns the system number if the System code is not entered.

5 Department—Enter the system’s department. The system automatically populates GIS ID, Layer, Location X, Location Y, Map, and Map Org.

6 Type—Select the equipment type.

7 Status—The system defaults the Status to Installed; this value cannot be changed. Enter the following Equipment Details:

8 Class—Enter the class of the system.

9 Category—Enter the system’s category.

Note: If you enter a category for which calibration data has been defined, the system copies the calibration and test point data to the system.

10 Cost Code—Enter the system’s cost code.

11 Production—Select if the system is used in production.

12 Safety—Select to observe safety precautions when working with this system.

13 Profile—Enter the profile on which to base this equipment record. See “Defining equipment using profiles” on page 97

14 Out of Service—Select if the system is not used.

15 Prevent WO Completion—Select to indicate that work orders for this system should not be closed.

16 System Level, Assembly Level, and Component Level—Enter the VMRS codes identifying the system, assembly, and component associated with the vehicle. See “Defining VMRS equipment” on page 97. The system automatically populates VMRS Description.

17 Commission Date—Enter the installation date for the system. The Commission Date defaults to the current date when you create a system.

18 Assigned To—Enter the person responsible for the system.

19 Meter Unit—Enter the system’s primary unit of measure.

20 Criticality—Select a criticality code to indicate the relative importance of the system to the overall production of goods or services for your organization.

21 cGMP—Select to indicate that the equipment is subject to cGMP standards.

22 Dormant Start—Enter the date on which the dormant period for any PM work orders for the equipment begins.

23 Dormant End—Enter the date on which the dormant period for any PM work orders for the equipment ends.

24 Reuse Dormant Period—Select to use the same specified dormant period for any PM work orders for the equipment on an annual basis.

25 Track Resources—Select to track the resources directly related to this equipment.

26 Sold/Scrap Date—Enter the date on which the asset is sold or scrapped. Enter the following Tracking Details:

27 Manufacturer—Enter the manufacturer of the system.

28 Serial Number—Enter the serial number of the system.

29 Model—Enter the model of the system.

30 Revision—Enter the revision of the system. Enter the following Variables:
31 Variable 1, Variable 2, Variable 3, Variable 4, Variable 5, and Variable 6—Enter the variables of the system. Enter the following Call Center Details:

32 Calendar Group—Enter the calendar group for the system. The system automatically populates Calendar Group Org.

33 Penalty Factor—Enter the penalty factor for the system.

34 Minimum Deduction/Currency—Enter the minimum deduction allowed.

35 Location—Enter the location of the system.

36 Equipment Length, Equip. Length UOM, Linear Ref. UOM, Ref. Precision, and Geographical Ref.—Enter the linear equipment information. See “Defining linear equipment” on page 96

37 Cost of Needed Repairs—Enter the cost of necessary repairs. The system automatically populates the currency.

38 Replacement Value—Enter the current replacement value for the equipment. The system automatically populates the currency.

39 Facility Condition Index—Enter the resultant FCI based on the maintenance details.

40 Utility Bill Level—Select to mark the asset as having capabilities to record utility bills.

41 GAS Tracked—Select to set the equipment as GAS (Global Asset Sustainability) Tracked.

42 Floor Area—Enter the floor area, and then enter the unit of measure for the floor area.

43 Estimated Revenue—Enter the estimated revenue the piece of equipment can generate.

44 Region—Enter the region for the equipment. The system automatically populates Region Org.

45 Primary Use—Enter the primary use for the equipment.

46 Year Built—Enter the year built for the equipment.

47 Service Life (years)—Enter the service life of the equipment.

48 Lock Reliability Ranking Values—Select to lock the reliability ranking values for the equipment on the Reliability Survey tab of the Equipment screen.

49 Reliability Ranking—Enter the reliability ranking code for the equipment. The system automatically populates Reliability Ranking Idex, Reliability Ranking Score, Reliability Ranking Values Out of Sync, Reliability Ranking Values Last Calculated, Reliability Survey Last Updated, and Reliability Ranking Setup Last Updated, after answering the reliability survey.

50 Click Save Record. If a review has been performed on the Safety tab, the system automatically populates Safety Date Review Required and Safety Reviewed By. If a review has been performed
on the Permits tab, the system automatically populates Permit Date Review Required and Permit Reviewed By. If a review has been performed on the LOTO tab, the system automatically populates LOTO Date Review Required and LOTO Reviewed By. The system automatically populates Equipment Configuration, Equipment Configuration Org., and Equipment Configuration Revision.

Defining locations

Locations are the top level of the equipment hierarchy and, like other equipment, can have parents and children with many sublevels. For example, a facility can be a parent to children such as wings, floors, and levels.

Locations can also mean two different things. One location can tell you a piece of equipment’s physical location, e.g., the pump in Boiler Room 2. Another location can be equipment itself, e.g., Boiler Room 2. Keep in mind that equipment keeps its location until it is moved; in other words, it can only be in one place at one time.

Note: Set up parent locations before setting up child locations. You cannot delete parent locations if child locations exist.

To define locations:

1. Open the Locations form.
2. Click New Record.
3. Organization—Enter the organization to which the location belongs if you use multi-organization security.
4. Location—Enter a unique code identifying the location, and then enter a description of the location in the adjacent field.
5. Department—Enter the location’s department.
6. Class—Enter the class of the location.
7. Safety—Select to observe safety precautions when working at this location.
8. Out of Service—Select if the location is not used.
9. Cost Code—Enter the location’s cost code.
10. cGMP—Select to indicate that the equipment is subject to cGMP standards. Enter the following Call Center Details:
11. Calendar Group—Enter the calendar group for the location. The system automatically populates Calendar Group Org.
12. Penalty Factor—Enter the penalty factor for the location.
13. Minimum Deduction/Currency—Enter the minimum deduction allowed. Enter the following Hierarchy details:
14. Parent Location—Enter the parent location. The system automatically populates Safety Date Review Required and Safety Reviewed By if the selected equipment has hazards and precautions added on the Safety page.
15. Click Save Record. If a review has been performed on the Safety tab, the system automatically populates Safety Date Review Required and Safety Reviewed By. If a review has been performed...
on the Permits tab, the system automatically populates Permit Date Review Required and Permit Reviewed By. If a review has been performed on the LOTO tab, the system automatically populates LOTO Date Review Required and LOTO Reviewed By.

Defining linear equipment

Linear equipment occupies a length of space, e.g., an interstate or bridge. Create work orders for specific points or segments of linear equipment records, allowing you to track work orders, costs, and events along the equipment.

After you define a linear equipment record, add linear references. See "Adding references to linear equipment" on page 110.

**Note:** You can edit Equipment Length or Equip. Length UOM for an existing equipment record as long as there are no linear references that fall outside of the newly entered length in the Linear Ref. UOM.

If you edit the length of a linear equipment record, the system may automatically edit associated PM records when installation parameter PMRVCTRL is set to No. If the new equipment length falls on or within the length of the PM, the system automatically updates the To Point of the PM record based on the new equipment length. If the new equipment length falls outside of the length of the PM, the system does not update the PM record.

To define linear equipment:

1. Open the Assets, Positions, or Systems form.
2. Click New Record.
3. Enter the information necessary to define the piece of equipment. See "Defining assets" on page 85, "Defining positions" on page 89, or "Defining systems" on page 92.
4. Equipment Length—Enter the length of the equipment.
5. Equip. Length UOM—Enter the unit of measure for the Equipment Length.
6. Linear Ref. UOM—Enter the unit of measure for linear references. The system populates the from and to point unit of measure for work orders based on the Linear Ref. UOM. Linear references can have a different UOM than the Equipment Length, e.g., if the system is integrated with ESRI’s GIS, the equipment’s map units may be in feet, but linear references, e.g., mile posts, may be defined in miles.
7. Ref. Precision—Enter the number of decimal places to include in linear reference measurements.
   **Note:** If you do not enter a Reference Precision, the system automatically sets the precision to 0.
8. Geographical Ref.—Enter a geographical reference for the equipment.
9. Click Save Record.
Defining VMRS equipment

Define equipment records as VMRS equipment as you enter the equipment information on the Assets, Positions, or Systems form. Before you can define VMRS equipment, you must define VMRS codes. See "Defining VMRS codes" on page 380.

Once you define VMRS equipment records, track work orders and warranties associated to the piece of equipment based on the specified VMRS codes. See "Associating VMRS codes with warranties" on page 82.

To define VMRS equipment:

1. Open the Assets, Positions, or Systems form.
2. Click New Record.
3. Enter the information necessary to define the piece of equipment. See "Defining assets" on page 85, "Defining positions" on page 89, or "Defining systems" on page 92 earlier in this chapter.
4. System Level—Enter the VMRS code identifying the system associated with the vehicle.
5. Assembly Level—Enter the VMRS code identifying the assembly associated with the vehicle.
6. Component Level—Enter the VMRS code identifying the component associated with the vehicle.
   - The system automatically populates VMRS Description based on the System Level, Assembly Level, and Component Level combination.
   - **Note:** You cannot enter a Component Level unless you entered an Assembly Level.
7. Click Save Record.

Defining equipment using profiles

Before defining equipment records using profiles, create profiles. See "Creating equipment profiles" on page 83 for more information.

To define equipment using profiles:

1. Open the Assets, Positions, or Systems form.
2. Click New Record.
3. Enter the information necessary to define the piece of equipment. See "Defining assets" on page 85, "Defining positions" on page 89, or "Defining systems" on page 92 earlier in this chapter.
4. Profile—Enter the profile. The system automatically populates the description, Department, Class, Category, Equipment Value, Meter Unit, Manufacturer, Model, Revision, Part, Variable 1 through Variable 6, and any custom fields on the Record View page. The system automatically populates Part and its description, Part Org., Quantity and its unit of measure, and Comments on the Parts Associated page of the record.
5. Click Save Record.
Defining healthcare assets

Define your organization’s healthcare equipment as assets. Assets and properties work together to create a system. When assets and properties are linked to define a system then the entire system is affected by actions or movements of one individual piece, e.g., if one piece of equipment breaks down, the entire system must be taken offline.

To define healthcare assets:

1. Open the Assets form.
2. Click New Record.
3. **Organization**—Enter the organization to which the asset belongs if you use multi-organization security.
4. **Department**—Enter the asset's department.
5. **Type**—Select the asset type.
6. **Asset**—Enter a unique code identifying the asset, and then enter a description of the asset in the adjacent field. Enter the following Equipment Details:
   - **Status**—Select the system status.
   - **Class**—Enter the class of the asset.
   - **Category**—Enter the asset's category or sub-class.
   - **Criticality**—Enter a criticality code to indicate the relative importance of the equipment to the overall production of goods or services for your system.
   - **Safety**—Select to observe safety precautions when working with this equipment.
   - **Profile**—Enter the profile on which to base this asset record.
   - **Meter Unit**—Enter the asset’s primary unit of measure.
   - **Assigned To**—Enter the person responsible for the asset.
   - **Cost Code**—Enter the asset's cost code.
   - **Temperature Monitored**—Select if it is necessary or required to monitor the equipment's temperature.
   - **Out of Service**—Select if the asset is not used. The system automatically populates Withdrawal Date. Enter the following Tracking Details:
     - **Manufacturer**—Enter the asset's manufacturer.
     - **Model**—Enter the asset's model number.
     - **Serial Number**—Enter the asset's serial number.
     - **Hardware Version**—Enter the hardware version.
     - **Software Version**—Enter the software version.
     - **Purchasing Asset ID**—Enter the code identifying the asset as associated to the purchasing department.
     - **Biomedical Asset ID**—Enter the code identifying the asset as a biomedical asset.
     - **Revision**—Enter the manufacturer’s revision number.
     - **UMDNS Code**—Enter the code identifying the asset in the Universal Medical Device Nomenclature System™ (UMDNS) which is a standard international nomenclature and computer coding system for medical devices.
27 **OEM Site/System ID**—Enter the site and/or system identification for service companies and original equipment manufacturer for the asset.

28 **Vendor**—Enter the vendor.

29 **Coverage Type**—Select the maintenance coverage type for the asset. Select **Calendar** to indicate that the warranty is based on number of days used or **Usage** to indicate that the warranty is based on actual usage.

30 **X Coordinate**—Enter the X Coordinate for which GIS features should appear.

31 **Y Coordinate**—Enter the Y Coordinate for which GIS features should appear.

32 **Z Coordinate**—Enter the Z Coordinate for which GIS features should appear. Enter the following Part Association Details:

33 **Part**—Enter the asset's part number.

   **Note:** Only enter parts that are track by asset.

34 **Store**—Enter the store in which the asset is stocked.

35 **Bin**—Enter the bin storing the asset.

36 **Lot**—Enter the lot number, or batch, of the part. Enter the following Compliance Association Details:

37 **Lockout/Tagout**—Select if the asset equipment complies with OSHA regulations on lockout/tagout procedures. This regulation ensures machines are properly shut down and that they do not start again until service or maintenance on the machine is completed.

38 **Personal Protective Equipment**—Select if OSHA requires the use of personal protective equipment when operating the equipment to reduce exposure to hazards or injury.

39 **Confined Space**—Select if the equipment is located in an area defined as a confined space as per OSHA regulations.

40 **Statement of Conditions**—Select to indicate the asset's equipment relates to the Statement of Conditions as required by The Joint Commission.

41 **Building Maintenance Program**—Select to indicate the asset equipment is inventoried in the building maintenance program.

42 **HIPAA Confidentiality**—Select to indicate the asset equipment contains confidential patient health information and the equipment must comply with regulations. Enter the following Hierarchy Details:

43 **Parent Asset**—Enter the parent asset of the equipment and/or asset.

44 **Dependent**—Select if the asset is dependent on the parent asset.

45 **Cost Roll-up**—Select if costs should roll up to the parent asset.

46 **Property**—Enter the property location of the asset.

47 **Dependent**—Select if the asset is dependent on the property.

48 **Cost Roll-up**—Select if costs should roll up to the parent property of the child asset. Enter the following Financial and Disposition Details:

49 **Ownership Type**—Select the ownership details of the asset equipment, e.g., select **Lease** if the equipment is leased.

50 **Inventory Verification Date**—Select the date the equipment was last verified for inventory purposes.

51 **Equipment Value**—Enter the value of the equipment to define with this system.

52 **External PO No.**—Enter the purchase order number for which the part was received from an external vendor.
53 **Purchase Order #**—Enter the purchase order number for which the part was received. The system automatically populates **Purchase Order-Line**.

54 **Purchase Date**—Select the purchase order date.

55 **Purchase Cost**—Enter the purchase cost of the part.

56 **Install Date**—Select the date the equipment was installed.

57 **Commission Date**—Enter the commission or startup date of the asset. **Commission Date** defaults to the current date when you create an asset.

58 **Cost of Needed Repairs**—Enter the cost of necessary repairs. The system automatically populates the currency, and defaults **Eligible for Energy Star Label** to unselected.

59 **Replacement Value**—Enter the current replacement value for the equipment. The system automatically populates the currency.

60 **Facility Condition Index**—Enter the resultant FCI based on the maintenance details. \( \text{Cost of Needed Repairs/Current Replacement Value} = \text{FCI} \)

61 **Disposal Type**—Enter the manner in which the asset was disposed.

62 **Disposal Date**—Enter the date on which the asset is sold, scrapped, or disposed. Enter the following Facility Details:

63 **Primary Use**—Enter the primary use for the asset.

64 **Year Built**—Enter the year the asset was built.

65 **Floor Area**—Enter the floor area, and then enter the unit of measure for the floor area.

66 **Service Life (years)**—Enter the service life of the asset. Enter the following Risk Assessment Details:

67 **Lock Risk Assessment Values**—Select to lock the reliability ranking values for the equipment on the Risk Assessment tab of the Equipment screen.

**Note:** If **Lock Risk Assessment Values** is selected, the system will not allow the user to modify the risk assessment survey answers and calculate risk assessment values for the equipment. The system also prevents the selection of equipment for update on the Batch Update Risk Assessment Values form.

68 **Risk Assessment**—Enter the risk assessment code for the equipment.


69 Click **Save Record**.

---

**Defining healthcare properties**

Define a property or a collection of properties and/or assets that work together to create a system. When assets and properties are linked to define a system then the entire system is affected by actions or movements of one individual piece, e.g., if one piece of equipment breaks down, the entire system must be taken offline.
To define properties for healthcare:

1. Open the **Properties** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the property belongs if you use multi-organization security.
4. **Department**—Enter the property's department.
5. **Type**—Select the property type. Enter the following Equipment Details:
6. **Status**—Select the property status.
7. **Class**—Enter the class of the property.
8. **Category**—Enter the property's category or sub-class.
9. **Criticality**—Enter a criticality code to indicate the relative importance of the equipment to the overall production of goods or services for your property.
10. **Profile**—Enter the profile on which to base this equipment record.
11. **Meter Unit**—Enter the equipment's primary unit of measure.
12. **Assigned To**—Enter the person responsible for the equipment.
13. **Cost Code**—Enter the equipment's cost code.
14. **Safety**—Select to observe safety precautions when working with this equipment.
15. **Temperature Monitored**—Select if it is necessary or required to monitor the equipment's temperature.
16. **Out of Service**—Select if the equipment is not used. The system automatically populates **Withdrawal Date**. Enter the following Tracking Details:
17. **Manufacturer**—Enter the equipment's manufacturer.
18. **Model**—Enter the equipment's model number.
19. **Serial Number**—Enter the equipment's serial number.
20. **Hardware Version**—Enter the hardware version.
21. **Software Version**—Enter the software version. The system automatically populates **Revision**.
22. **Purchasing Asset ID**—Enter the code identifying the equipment as associated to the purchasing department.
23. **Biomedical Asset ID**—Enter the code identifying the equipment as a biomedical equipment.
24. **UMDNS Code**—Enter the code identifying the asset in the Universal Medical Device Nomenclature System™ (UMDNS) which is a standard international nomenclature and computer coding system for medical devices.
25. **OEM Site/System ID**—Enter the site and/or system identification for service companies and original equipment manufacturer for the property.
26. **Vendor**—Enter the vendor.
27. **Coverage Type**—Select the maintenance coverage type for the equipment. Select **Calendar** to indicate that the warranty is based on number of days used or **Usage** to indicate that the warranty is based on actual usage.
28. **X Coordinate**—Enter the X Coordinate for which GIS features should appear.
29. **Y Coordinate**—Enter the Y Coordinate for which GIS features should appear.
30 **Z Coordinate**—Enter the Z Coordinate for which GIS features should appear. Enter the following Compliance Association Details:

31 **Lockout/Tagout**—Select if the property equipment complies with OSHA regulations on lockout/tagout procedures. This regulation ensures machines are properly shut down and locked so that they do not start again until service or maintenance on the machine is completed.

32 **Personal Protective Equipment**—Select if OSHA requires the use of personal protective equipment when operating the equipment to reduce exposure to hazards or injury.

33 **Confined Space**—Select if the equipment is located in an area defined as a confined space as per OSHA regulations.

34 **Statement of Conditions**—Select to indicate the property relates to the Statement of Conditions as required by The Joint Commission.

35 **Building Maintenance Program**—Select to indicate the property equipment is inventoried in the building maintenance program.

36 **HIPAA Confidentiality**—Select to indicate the property equipment contains confidential patient health information and the equipment must comply with regulations. Enter the following Hierarchy Details:

37 **Parent Property**—Enter the parent property of the equipment and/or property.

38 **Dependent**—Select if the property is dependent on the parent property.

39 **Cost Roll-up**—Select if costs should roll up to the parent property.

40 **Asset**—Enter the asset to categorize as a child of the property in the parent/child hierarchy.

41 **Dependent**—Select if the asset is dependent on the property.

42 **Cost Roll-up**—Select if costs should roll up to the parent property of the child asset.

43 **Location**—Enter the location of the asset. Enter the following Financial and Disposition Details:

44 **Ownership Type**—Select the ownership details of the property equipment, e.g., select **Lease** if the equipment is leased.

45 **Inventory Verification Date**—Select the date the equipment was last verified for inventory purposes.

46 **Equipment Value**—Enter the value of the equipment to define with this property.

47 **Purchase Order #**—Enter the purchase order number for which the part was received. The system automatically populates **Purchase Order-Line**.

48 **Purchase Date**—Select the purchase order date.

49 **Purchase Cost**—Enter the purchase cost of the part.

50 **Install Date**—Select the date the equipment was installed.

51 **Commission Date**—Enter the commission or startup date for the property. **Commission Date** defaults to the current date when you create a property.

52 **Cost of Needed Repairs**—Enter the cost of necessary repairs. The system automatically populates **Eligible for Energy Star Label** to unselected.

53 **Replacement Value**—Enter the current replacement value for the equipment. The system automatically populates the currency.

54 **Facility Condition Index**—Enter the resultant FCI based on the maintenance details. **Cost of Needed Repairs/Current Replacement Value=FCI**

55 **Disposal Type**—Enter the manner in which the equipment was disposed.
56 Disposal Date—Enter the date on which the equipment is sold, scrapped, or disposed. Enter the following Facility Details:

57 Primary Use—Enter the primary use for the equipment.

58 Year Built—Enter the year the equipment was built.

59 Floor Area—Enter the floor area, and then enter the unit of measure for the floor area.

60 Service Life (years)—Enter the service life of the equipment. Enter the following Risk Assessment Details:

61 Lock Risk Assessment Values—Select to lock the reliability ranking values for the equipment on the Risk Assessment tab of the Equipment screen.

Note: If Lock Risk Assessment Values is selected, the system will not allow the user to modify the risk assessment survey answers and calculate risk assessment values for the equipment. The system also prevents the selection of equipment for update on the Batch Update Reliability Ranking Values form.

62 Risk Assessment—Enter the risk assessment code for the equipment.

Note: The system automatically populates Risk Assessment Index, Risk Assessment Score, Risk Assessment Values Out of Sync, Risk Assessment Values Last Calculated, Risk Assessment Survey Last Updated, and Risk Assessment Setup Last Updated, after answering the risk assessment survey.

63 Click Save Record.

Note: To create a work order for the property, right-click on the form, and then click Create WO.

Defining healthcare systems

Define a system consisting of a collection of properties and/or assets that work together to create a system. When assets and properties are linked to define a system then the entire system is affected by actions or movements of one individual piece, e.g., if one piece of equipment breaks down, the entire system must be taken offline.

To define systems for healthcare:

1 Open the Systems form.
2 Click New Record.
3 Organization—Enter the organization to which the system belongs if you use multi-organization security.
4 Department—Enter the system's department.
5 Type—Select the system type. Enter the following Property Details:
6 Equipment No.—Enter the equipment number and then enter a description of the equipment in the adjacent field.
7 Status—Select the system status.
8 Class—Enter the class of the system.
9 **Category**—Enter the system's category or sub-class.

10 **Criticality**—Enter a criticality code to indicate the relative importance of the equipment to the overall production of goods or services for your system.

11 **Safety**—Select to observe safety precautions when working with this equipment.

12 **Profile**—Enter the profile on which to base this equipment record.

13 **Meter Unit**—Enter the equipment's primary unit of measure.

14 **Assigned To**—Enter the person responsible for the equipment.

15 **Cost Code**—Enter the equipment's cost code.

16 **Temperature Monitored**—Select if it is necessary or required to monitor the equipment's temperature.

17 **Out of Service**—Select if the asset is not used. The system automatically populates Withdrawal Date. Enter the following Tracking Details:

18 **Manufacturer**—Enter the equipment's manufacturer.

19 **Model**—Enter the equipment's model number.

20 **Serial Number**—Enter the equipment's serial number.

21 **Hardware Version**—Enter the hardware version.

22 **Software Version**—Enter the software version.

23 **Revision**—Enter the manufacturer’s revision number.

24 **Purchasing Asset ID**—Enter the code identifying the asset as associated to the purchasing department.

25 **Biomedical Asset ID**—Enter the code identifying the asset as a biomedical equipment.

26 **UMDNS Code**—Enter the code identifying the asset in the Universal Medical Device Nomenclature System™ (UMDNS) which is a standard international nomenclature and computer coding system for medical devices.

27 **OEM Site/System ID**—Enter the site and/or system identification for service companies and original equipment manufacturer for the system.

28 **Vendor**—Enter the vendor.

29 **Coverage Type**—Select the maintenance coverage type for the asset. Select Calendar to indicate that the warranty is based on number of days used or Usage to indicate that the warranty is based on actual usage.

30 **X Coordinate**—Enter the X Coordinate for which GIS features should appear.

31 **Y Coordinate**—Enter the Y Coordinate for which GIS features should appear.

32 **Z Coordinate**—Enter the Z Coordinate for which GIS features should appear. Enter the following Compliance Association Details:

33 **Lockout/Tagout**—Select if the system equipment complies with OSHA regulations on lockout/tagout procedures. This regulation ensures machines are properly shut down and that they do not start again until service or maintenance on the machine is completed.

34 **Personal Protective Equipment**—Select if OSHA requires the use of personal protective equipment when operating the equipment to reduce exposure to hazards or injury.

35 **Confined Space**—Select if the equipment is located in an area defined as a confined space as per OSHA regulations.
36 **Statement of Conditions**—Select to indicate the system relates to the Statement of Conditions as required by The Joint Commission.

37 **Building Maintenance Program**—Select to indicate the system equipment is inventoried in the building maintenance program.

38 **HIPAA Confidentiality**—Select to indicate the system equipment contains confidential patient health information and the equipment must comply with regulations. Enter the following Financial and Disposition Details:

39 **Ownership Type**—Select the ownership details of the system equipment, e.g., select **Lease** if the equipment is leased.

40 **Inventory Verification Date**—Select the date the equipment was last verified for inventory purposes.

41 **Equipment Value**—Enter the value of the equipment to define with this system.

42 **Purchase Order #**—Enter the purchase order number for which the part was received. The system automatically populates **Purchase Order-Line**.

43 **Purchase Date**—Select the purchase order date.

44 **Install Date**—Select the date the equipment was installed.

45 **Commission Date**—Enter the commission or startup date of the system. **Commission Date** defaults to the current date when you create a system.

46 **Cost of Needed Repairs**—Enter the cost of necessary repairs. The system automatically populates the currency, and defaults **Eligible for Energy Star Label** to unselected.

47 **Replacement Value**—Enter the current replacement value for the equipment. The system automatically populates the currency.

48 **Facility Condition Index**—Enter the resultant FCI based on the maintenance details. Cost of Needed Repairs/Current Replacement Value=FCI

49 **Disposal Type**—Enter the manner in which the equipment was disposed.

50 **Disposal Date**—Enter the date on which the equipment is sold, scrapped, or disposed. Enter the following Facility Details:

51 **Primary Use**—Enter the primary use for the equipment.

52 **Year Built**—Enter the year the equipment was built.

53 **Floor Area**—Enter the floor area, and then enter the unit of measure for the floor area.

54 **Service Life (years)**—Enter the service life of the equipment. Enter the following Risk Assessment Details:

55 **Lock Risk Assessment Values**—Select to lock the reliability ranking values for the equipment on the Risk Assessment Survey tab of the Equipment screen.

**Note:** If **Lock Risk Assessment Values** is selected, the system will not allow the user to modify the risk assessment survey answers and calculate risk assessment values for the equipment. The system also prevents the selection of equipment for update on the Batch Update Risk Assessment Values form.

56 **Risk Assessment**—Enter the reliability ranking code for the equipment.

57 Click **Save Record**.

---

### Creating equipment hierarchies

Define parent/child relationships among equipment to link costs and meter readings.

### Defining equipment hierarchies

Define parent/child relationships among equipment. Define parent records before child records. If you add a third level, the child becomes a parent, and the added piece of equipment is its child.

**Note:** Equipment hierarchies must be consistent with the hierarchy rules described in "Understanding equipment" on page 77 earlier in this chapter, e.g., a system cannot be the parent of a location because locations are at the top of the hierarchy of equipment information. Assets, however, are the exception to this rule. Although assets are at the bottom of the hierarchy of equipment information, an asset can be the parent of a position.

To define equipment hierarchies:

1. Open the **Assets, Positions, Systems**, or **Locations** form.
2. Select the equipment for which to define a hierarchy, and then click the **Structure** tab.
3. **Dataspy** and **Filter**—Query for the equipment for which to define a hierarchy.
4. Choose one of the following options:
   - *Define a parent for a piece of equipment*—Drag and drop the equipment record from the grid to the Add Parent drop point in the Structure Details.
   - *Define a child for a piece of equipment*—Drag and drop the equipment record from the grid to the selected parent equipment record in the Structure Details. The system indicates the piece of equipment is a child with the blue flag icon.

   **Note:** Drag and drop an equipment record from the grid to the blue flag icon next to an existing record. The system adds the record from the grid as a sibling immediately below the record next to the blue flag icon.

5. Click **Save Record**.

---

### Reorganizing equipment hierarchies

Drag and drop equipment records within an equipment hierarchy to reorganize its structure.

To reorganize equipment hierarchies:

1. Open the **Assets, Positions, Systems**, or **Locations** form.
2 Select the equipment for which to reorganize a hierarchy, and then click the **Structure** tab.

3 Choose one of the following options:

   - *Change the order in which child equipment records appear*—Drag and drop an equipment record from its current location in the Structure Details to the blue flag icon next to the sibling record under which you want the equipment to appear.
   
   - *Move a piece of equipment under a new parent*—Drag and drop the equipment record from its current location in the Structure Details to its new parent record. The system transfers cost and meter roll-up data for the equipment record to its new parent.

4 Click **Save Record**.

### Viewing equipment hierarchies

The system displays the hierarchical structure of a piece of equipment.

To view equipment hierarchies:

1 Open the **Assets**, **Positions**, **Systems**, or **Locations** form.
2 Select the equipment for which to view the hierarchy, and then click the **Structure** tab.
3 **Dataspy** and **Filter**—Query for the equipment for which to define a hierarchy.
4 View the equipment hierarchy on the left side of the form under Structure Details.

   - A number (e.g., 2003001) followed by the equipment type (A, P) indicates that this is the highest level for that equipment type.
   
   - A plus sign (+) indicates that the equipment may have children, but they are not displayed. To display an equipment’s children, click the plus sign.
   
   - A minus sign (−) indicates that the equipment has children and the children are visible. Click the minus sign to hide the children.
   
   - Click on a piece of equipment to make it active; the equipment then becomes highlighted in blue. The children of the active row on the hierarchical area (on the left) are shown in detail on the right side of the form.
   
   - To change the focus of the Structure Details, select an equipment record in the tree view, and then click **Display as Focal Point**. The system updates the Structure Details.
   
   - To view the record details, select an equipment record in the tree view, and then click **Go to Selection**. The system displays the **Record View** page for the selected equipment.

### Unlinking equipment

Unlink equipment records from the Structure Details tree view by unlinking the equipment record from other equipment records.

To unlink equipment:
1 Open the **Assets, Positions, Systems, or Locations** form.
2 Select the equipment for which to unlink the structure, and then click the **Structure** tab.
3 Select the parent or child equipment record to unlink, and then click **Un-Link**.

### Toggling cost rollup

Roll up costs and history to a particular parent piece of equipment (assets, positions, and systems only).

To toggle cost rollup:

1 Open the **Assets, Positions, Systems, or Locations** form.
2 Select the equipment for which to toggle cost rollup, and then click the **Structure** tab.
   
   **Note:** If an equipment record has a toggle equipment cost icon next to it, the equipment’s costs do not roll up to the parent equipment. Toggle the cost rollup to modify the equipment record.

3 Select the parent or child equipment record for which to toggle cost rollup, and then click **Toggle Cost Rollup**.

### Viewing the parents of assets, positions, or systems

View a list of all immediate parents defined for equipment.

To view a list of parent equipment:

1 Open the **Assets, Positions, or Systems** form.
2 Select the equipment for which to view parents, and then click the **Structure** tab.
3 Select the equipment record for which to view parents, and then click **Show Parents**.
4 **Dependent**—Select if the child is dependent on the parent.
   
   **Note:** You can only select **Dependent** for one parent. You can also specify that no parent is **Dependent**.

   When the selected equipment is an asset, position, or system, and a location is listed as a parent of the equipment, the **Dependent** checkbox is unchecked for all parents listed.

   Checking the checkbox for one of the other parents listed will result in the removal of the direct relationship with the location.

5 Click **Submit**.

### Viewing the parent of a location

View the immediate parent location of another location.
To view the parent location:

1. Open the Locations form.
2. Select the equipment for which to view the parent, and then click the Structure tab.
3. Select the location record for which to view the parent, and then click Show Parents.

   **Note:** This checkbox is always selected when both the parent and the child are locations.

4. **Dependent**—This checkbox is always selected when both the parent and the child are locations.

   **Note:** You cannot change the setting of the Dependent checkbox in this case.

5. Click Submit.

Creating work orders

You can create a work order for any equipment in the hierarchy.

**Note:** See "Defining regular work order headers" on page 389 for more information on creating work orders, entering linear reference information, and adding the first activity to a work order.

To create work orders:

1. Open the Assets, Positions, Systems, or Locations form.
2. Select the equipment for which to create a work order, and then click the Structure tab.
3. Select the equipment record for which to create a work order, and then click Create WO.
4. Enter the information necessary to create the work order.
5. Enter linear reference information.

   **Note:** The system only displays Linear Reference Details if the equipment record for which to create the work order is a linear equipment record.

6. Enter the information necessary to add the first activity to the work order.
7. Click Submit.

Printing the WO repair costs chart for equipment

Print the work order repair costs chart report for equipment. The report displays a list of all work orders with a status of Released and Completed, and the costs associated for selected equipment.

To print the work order repair costs chart for equipment:

1. Open the Assets form.
2. Click the Work Order Repair Costs Chart tab.
3. Start Date—Enter the starting date for which to retrieve the data.
4. End Date—Enter the ending date for which to retrieve the data. The system displays the total work order cost for the selected equipment by cost type.
Printing the PM repair costs chart for equipment

Print the PM work order repair costs chart report for equipment. The report displays a chart that breaks down total PM costs by cost type. The report also contains a detail section that lists individual PM work orders and the costs associated for selected equipment.

To print the PM repair costs chart for equipment:

1. Open the **Assets** form.
2. Click the **PM Repair Costs Chart** tab.
3. **Start Date**—Enter the starting date for which to retrieve the data.
4. **End Date**—Enter the ending date for which to retrieve the data. The system displays the total PM work order cost for the selected equipment by cost type.

Associating references with linear equipment

Associate linear references with linear equipment and specify the point or segment at which the reference is located. See "Defining linear equipment" on page 96 for more information about defining equipment as linear equipment.

Linear references enable you to dynamically segment work orders and equipment costs based on meaningful reference descriptions.

Adding references to linear equipment

Add linear references to linear equipment records. A linear reference is a point or line along a linear equipment record and serves as a reference point.

**Note**: If two linear equipment records intersect, you must define the point of intersection as a linear reference on each equipment record, e.g., if Main St. and Washington Ave. intersect, define Main St. as a linear reference on Washington Ave.’s equipment record and define Washington Ave. as a linear reference on Main St.’s equipment record. If you do not define the point of intersection as linear references on both equipment records, the system will calculate linear distance incorrectly when searching for equipment. See "Searching for references" on page 111.

To add references to linear equipment:

1. Open the **Assets**, **Systems**, or **Positions** form.
2. Select the asset, system, or position for which to add a linear reference, and then click the **Linear References** tab. The system automatically populates **Equipment Length** and the unit of measure in the adjacent field.
3. Click **Add Reference**.
4. **Type**—Select one of the following options:
Reference types are linked to the LRTP entity for which you must define your reference type codes. Depending on your system configuration, the codes listed below are not the codes that appear in the dropdown. Contact your system administrator for more information.

5 Linear reference system—Select to indicate that this reference denotes the measurement system by which to locate a point, line, or piece of equipment along the linear equipment record, e.g., mile markers on an interstate.

6 Related equipment—Select to indicate that this reference denotes equipment that is located along the linear equipment record, e.g., exit ramps along an interstate.

7 Point of interest—Select to indicate that this reference denotes any point along the linear equipment record that is important to track, but is not defined as an equipment record within the system, e.g., road signs.

Note: If you select Related equipment, the system enables Equipment.

8 Equipment—Enter the equipment record to add as the reference if you selected Related equipment as the Type. The system automatically populates Ref. Description, Equipment Org., and Geographical Reference.

9 Ref. Description—Enter a description of the reference.

10 From Point—Enter the point on the linear equipment record from which to begin the reference.

11 To Point—Enter the point on the linear equipment record to end the reference.

12 Geographical Reference—Enter a geographical reference point for the reference.

13 Click Submit.

Searching for references

Select an equipment record, and then search for linear references or linear equipment records within a defined linear distance of the equipment record.

Note: The system cannot accurately calculate the point of intersection of two linear equipment records unless you define the point of intersection as a linear reference on each equipment record, e.g., if you add Main St. as a linear reference on Washington Ave. but do not add Washington Ave. as a reference on Main St., the system assumes that Washington Ave. crosses Main St. at point 0 on Main St. See "Adding references to linear equipment" on page 110.

To search for references:

1 Open the Assets, Positions, or Systems form.

2 Select the asset, position, or system from which to begin your search, and then click the Record View tab.

   Note: The selected equipment record must be a linear equipment record or a linear reference. See "Defining linear equipment" on page 96 and "Adding references to linear equipment" on page 110.

3 Right-click, and then select Linear Equipment Search. The system automatically populates Originating Point with the midpoint of the equipment record, i.e., the length of the equipment record divided by 2 and rounded to the equipment record’s defined precision. The system automatically
populates the Search Parameters with the class of the equipment record for which you are searching for linear references.

**Note:** If the equipment record on which you are basing your search does not contain a **Linear Reference UOM**, the system protects and populates **Originating Point** with 0 and the **Linear Distance** unit of measure with Feet.

4 **Originating Point**—Enter the point on the **Originating Equipment** from which to begin your search.

5 **Linear Distance**—Enter the distance from the **Originating Point** of the **Originating Equipment** within which to search.

6 **UOM**—Enter the unit of measure for the entered **Linear Distance**.

7 Enter filter criteria, and then click **Run**. The system displays linear references that fall on or within the specified distance and meet the filter criteria. The system calculates each linear reference’s distance from the **Originating Point** in the unit of measure of the **Linear Distance** and displays the linear distance in the list.

**Note:** The system displays each linear reference’s linear parent, linear parent organization, and linear parent description if the linear parent equipment also falls on or within the specified distance. The linear parent is the linear equipment record on which the equipment record is a reference.

8 Select a linear reference, and then click **Go To**.

**Note:** The system cannot display the **Record View** page of a Linear reference system or Point of Interest because they are not defined as equipment records.

Click the **Structure** tab to view equipment hierarchy information.

---

### Defining meter information

A physical meter is a tangible device, such as a car odometer, that measures a particular usage of a piece of equipment. Physical meters have limits on how much usage you can track before the meter resets to zero. Define physical meters on the **Meters** form.

Logical meters record the accumulative usage of a piece of equipment throughout its operational life. In the system, the meter due value of a preventive maintenance work order is always based on a logical meter. Use logical meters to monitor equipment usage. Plan preventive maintenance in response to logical meter levels. Define logical meters on the **Meters** page of the Assets, Positions, Systems, or Locations form.

### Defining physical meters

To define physical meters:

1 Open the **Meters** form.

2 Click **New Record**.
3 **Organization**—Enter the organization to which the meter belongs if you use multi-organization security.

4 **Meter**—Enter a unique code identifying the meter, and then enter a description of the meter in the adjacent field.

5 **Meter Unit**—Enter the meter’s unit of measure.

6 **Maximum Value**—Enter the maximum value the meter can reach before it exceeds its physical count limit and resets to zero. Leave **Maximum Value** blank if the meter cannot reset to zero when it reaches its physical count limit.

7 **Last Value**—Enter the last meter reading as necessary.

8 **Class**—Enter the class of the meter. The classes shown belong to the MET entity.

   **Note:** When defining a physical meter, **Service Point** is a read-only field. You can enter the **Service Point** of a piece of equipment when editing a meter record.

9 Click **Save Record**.

---

**Defining logical meters**

Define logical meters by linking meters with equipment.

To define logical meters:

1 Open the **Assets, Positions, Systems**, or **Locations** form.
2 Select the equipment with which to link a meter, and then click the **Meters** tab.
3 Click **Add Meter**.
4 **Unit of Measure**—Enter the unit of measure for the logical meter.
5 **Type of Meter**—Select one of the following meter types:
   • **Standalone**—Select so that the equipment will not receive meter readings based on its established parent equipment meters of the same UOM, nor will it send meter readings to any of its established child equipment meters of the same UOM.
   • **Parent**—Select to send the equipment’s meter readings down to child equipment. If you have parent/child relationships among equipment, enter meter readings for the parent piece of equipment only when adding meter readings.
   • **Child**—Select to enable the child equipment to receive usage information from a higher-level piece of equipment. The child equipment’s unit of measure (UOM) must match that of the parent.
   • **Parent & Child**—Select to receive meter readings based on entries made for its parent equipment meters of the same UOM, and it will send meter readings to its children.
6 **Total Usage**—Enter the total usage of the logical meter. The system automatically updates **Usage Since Install** and **Usage Since Last WO**.
7 **Usage Since Install**—Enter the usage of the logical meter since the last change in the equipment hierarchy.
8 **Est. Daily Usage**—Enter the estimated amount of the daily usage.
9 **Readings for Calc.**—Enter the number of readings used to calculate the average daily usage. The system automatically updates **Avg. Daily Usage**.

10 **Physical Meter**—Enter the code of the physical meter, if any.

11 **Last Reading Date**—Enter the date of the last meter reading.

12 Click **Submit**.

---

**Entering meter readings for logical meters**

To enter meter readings for logical meters:

1 Open the **Assets, Positions, Systems, or Locations** form.

2 Select the equipment for which to enter meter readings, and then click the **Meters** tab.

3 Select the meter for which to enter a reading, and then click **Enter Meter Reading**.

4 **Entry Type**—Choose one of the following entry types:
   - **Reading**—Enter the current meter reading for **Value**.
   - **Difference**—Enter the difference between the last reading and the current reading for **Value**.
   - **Date/Time**—Enter the date and time of the meter reading.
   - **Value**—Enter the meter reading value.

5 **Work Order**—Enter the work order. The system automatically populates **Related Work Order** if a related work order exists.

6 Click **Submit**.

---

**Viewing meter history**

To view meter history:

1 Open the **Assets, Positions, Systems, or Locations** form.

2 Select the equipment for which to view meter history, and then click the **Meters** tab.

3 Select the meter, and then click **View Meter History**.

4 View the meter history details and then click **Cancel**.

---

**Deleting meter readings from history**

You may only delete the most recent meter reading.

To delete meter readings from history:

1 Open the **Assets, Positions, Systems, or Locations** form.
2 Select the equipment for which to delete meter readings from history, and then click the **Meters** tab.
3 Select the meter, and then click **View Meter History**.
4 Select the meter reading to delete, and then click **Delete Reading**.
5 Click **Cancel**.

### Associating warranties with equipment

Associate warranty documents with specific pieces of equipment or with other equipment. Define warranty terms based on equipment usage or by date.

One or more warranty coverage records may be established for a piece of equipment for tracking purposes to ensure that stipulations of the warranty are adhered to both internally and externally. In general, there are two types of warranty coverage records that can be tracked for equipment: calendar-based and usage-based. Warranty coverage records can be associated with an asset, position, or system.

Calendar-based coverage records require a duration value expressed in days. The start and expiration of this type of warranty for a given piece of equipment is expressed in terms of calendar dates. Usage-based warranty coverage records require a duration value expressed in some unit of measure other than days. The warranty’s unit of measure has to be defined as a logical meter for the equipment. The start and expiration of this type of warranty for a given piece of equipment is expressed in terms of usage.

Note: If you are using the COVDURUP installation parameter, you may modify the **Duration** field of any warranty coverage record.

If you are using the COVDUPAC installation parameter, equipment can only have one active warranty coverage at any given time.

### Adding calendar-based warranty coverage to equipment

**Note:** To manage warranties from the perspective of the warranty record, select **Equipment > Warranty > Warranties**.

To add calendar-based warranty coverage to equipment:

1 Open the **Assets**, **Positions**, or **Systems** form.
2 Select the equipment for which to add a warranty, and then click the **Warranties** tab. The system automatically populates **Coverage Type**, **Active**, **Date Entered**, and **Entered By**.
3 Click **Add Warranty Coverage**.
4 **Warranty**—Enter the warranty document to associate with the equipment. The system automatically populates the warranty description, **Duration**, **Threshold**, **Manufacturer**, and **Supplier**.
5 **Coverage Type**—Select Calendar to indicate that the warranty is based on number of days used.
6 **Duration**—Enter the length of the warranty, in days.
7 **Threshold**—Enter the number of days prior to expiration at which the system should notify you that the warranty is about to expire.

8 **StartDate**—Enter the start date of the warranty.

9 **Expiration Date**—Enter the **Expiration Date**. The system automatically populates **Expiration Date** based on **StartDate** + **Duration**. Modify the **Expiration Date** as necessary.

   **Note:** The system automatically adjusts **Duration** if you modify the **StartDate** or **Expiration Date**.

10 **Active**—Select to indicate that the warranty is currently active.

11 Click **Submit**.

---

**Adding usage-based warranty coverage to equipment**

**Note:** To manage warranties from the perspective of the warranty record, select **Equipment** > **Warranty** > **Warranties**.

To add usage-based warranty coverage to equipment:

1 Open the **Assets**, **Positions**, or **Systems** form.

2 Select the equipment for which to add a warranty, and then click the **Warranties** tab. The system automatically populates **Coverage Type**, **Active**, **Date Entered**, and **Entered By**.

3 Click **Add Warranty Coverage**.

4 **Warranty**—Enter the warranty document to associate with the equipment. The system automatically populates the warranty description, **Duration**, **Threshold**, **Manufacturer**, and **Supplier**.

5 **Coverage Type**—Select **Usage** to indicate that the warranty is based on actual usage.

6 **Active**—Select to indicate that the warranty is currently active.

7 **Duration UOM**—Enter the usage length of the warranty and the usage unit of measure. The system automatically populates **Last Value** with the most recent meter reading of this equipment record and unit of measure. If there is no meter reading, the system populates **Last Value** with the **Total Usage** of the equipment record and unit of measure.

8 **Threshold UOM**—Enter the amount of usage quantity prior to expiration at which the system should notify you that the warranty is about to expire.

9 **Starting Usage**—Enter the amount of usage that occurred prior to the warranty start date.

10 **Expiration Usage**—Enter the amount of usage at which the warranty expires. The system automatically populates this field based on **Starting Usage** + **Duration UOM**. Modify the **Expiration Usage** as necessary.

11 Click **Submit**.
Creating warranty claims

Create warranty claims to recoup faulty parts or material and labor costs incurred when warranty-related repair work has to be performed in-house.

**Note:** The system does not display the work order costs on the warranty claim unless you specified that the piece of equipment listed on the work order activity is under warranty. See "Defining regular work order headers" on page 389 and "Associating warranties with equipment" on page 115.

Associate your warranty claim with a piece of equipment, a work order, or an activity on a work order to track warranty claim costs.

The system automatically assigns the **Status** of Unfinished to new claims. After creating and entering all of the information for the claim, update the claim status to indicate its progress throughout the claim process.

To create warranty claims:

1. Open the **Claims** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the warranty claim belongs if you use multi-organization security.
4. **Claim**—Enter a description of the claim in the adjacent field. The system assigns a claim number after you save the record.
   **Note:** If you do not enter a description, the system automatically populates the description defined on the work order with which you associate this warranty claim.
   **Note:** If the selected **Work Order** is a multiple equipment or MEC work order, then the system automatically populates **Equipment** with the equipment on the work order, and it is protected. The system enables you to create warranty claims for the parent multiple equipment work order or any related work order(s). See "Adding equipment to work orders to split work order costs" on page 398.
   If no **Equipment** is selected, the system displays all work orders, including MEC work orders.
   If an **Equipment** is selected, then the system displays only the work orders for which the work order equipment is the same as the equipment on the claim.
7. **Equipment**—Enter the piece of equipment with which to associate the warranty claim. The system automatically populates **Serial Number**, **Commission Date**, **Part Details**, and **VMRS Code Details**.
8. **Commission Date**—Enter the equipment’s commission date.
9 **Commissioning WO**—Enter the work order that commissioned the installation of the equipment associated with this warranty claim.

10 **Warranty**—Enter the warranty with which the claim is associated. The system automatically populates **Supplier**.

11 **Usage**—Enter a value to indicate the usage of the equipment when it failed under warranty.

12 **UOM**—Enter the unit of measure for the usage.

13 **Top Parent**—Enter the highest-level parent of the equipment associated with this warranty claim.

14 **Top Parent Usage**—Enter the usage value of the highest-level parent piece of equipment.

15 **Status**—Select the status of the claim if you are authorized to do so. Changing the status of a warranty claim may affect additional system checks and field changes as follows:

   - **Approved**—The system verifies that an attached work order has a system status of Completed. If the work order does not have a system status of Completed, the system verifies whether you want to continue. Click **Yes** to change the status to Approved. Any future costs added to or subtracted from the work order will not reflect on the warranty claim.

   - **Canceled**—The system protects all fields on the **Claims** form except **Status**.

   - **Completed**—The system protects all fields on the **Claims** form except **Status**.

   - **Response received**—The system allows you to enter **Settlement Details**. See "Entering settlement details for warranty claims" on page 118.

   - **Unfinished**—The system refreshes **WO Labor**, **WO Hired Labor**, **WO Services**, **WO Stock Items**, and **WO Direct Purchases** based on an attached work order each time the unfinished claim record is selected for display on the **Record View** page.

16 **Class**—Enter the class of the claim. The system automatically populates **Class Org**.

17 **Supplier**—Enter the supplier of the warranty claim.

18 **Date Filed**—Enter the date the warranty claim is filed.

19 **Date Reported**—Enter the date the warranty claim is reported.

20 **Other Claim Amount**—Enter the work order costs not included in **WO Claim Amount**. The system automatically updates **Total Claim Amount** with the total of **WO Claim Amount** and **Other Claim Amount**.

21 Click **Save Record**.

### Entering settlement details for warranty claims

Enter settlement details for a warranty claim after the claim has been settled. Enter monetary values according to the amount of money you are able to recoup through the claim process. The system automatically calculates **WO Cost Settlement** based on the monetary values you enter in **Labor**, **Hired Labor**, **Stock Items**, and/or **Direct Purchases**. If you specified a percentage to be recouped on the **Warranty** form, the system calculates **WO Cost Settlement** based on the percentage.

Before you can enter settlement details, the system status of the warranty claim must be **Response Received**. The system does not display this status as an option until the warranty claim has been given a system status of Approved.

To enter settlement details for warranty claims:
1  Open the **Claims** form.
2  Select the claim for which to enter settlement details, and then click the **Record View** tab.
3  **Status**—Select **Response received** as the status of the warranty claim. The system enables settlement details.
4  **Date Resolved**—Enter the date the warranty claim was resolved.
5  **Labor**—Enter a monetary value for labor.
6  **Hired Labor**—Enter a monetary value for hired labor.
7  **Services**—Enter a monetary value for services.
8  **Stock Items**—Enter a monetary value for stock items.
9  **Direct Purchases**—Enter a monetary value for direct purchases.
10 **Tools**—Enter a monetary value for tools.
11 **WO Cost Settlement**—Enter a monetary value for the cost settlement of the work order.
12 **Other Settlement**—Enter a monetary value for expenses not accounted for in WO Cost Settlement.
   The system automatically populates **Total Settlement**.
13 Click **Save Record**.

**Printing warranty claim vs. settlement chart**

Before you can set the parameters to generate the warranty claim vs. settlement chart, you must update the system Status of the warranty claim to Response Received. The system does not display this status as an option until the warranty claim has been given a system Status of Approved. See "Entering settlement details for warranty claims" on page 118.

To print warranty claim vs. settlement chart:

1  Open the **Warranties** form.
2  Select the warranty for which to generate the warranty claim vs. settlement chart, and then click the **Warranty Claim vs. Settlement Chart** tab.
3  **StartDate** and **EndDate**—Enter the starting and ending dates for which to retrieve data.
4  Click **Submit**.
5  Click **Print**.

**Associating permits with equipment**

Associate permits with equipment records.

**Note:** Define permits on the **Permits** form. See "Defining permits" on page 358 *Defining permits*.

To associate permits with equipment:

1  Open the **Assets**, **Positions**, **Systems**, **Locations**, **Profiles**, or **Categories** form.
Adding PM schedules to equipment

View and modify the list of PM schedules for equipment (assets, positions, or systems) on the PM Schedules tab of the respective Equipment form.

Add a new PM schedule to the equipment record, change the due date, deactivate an existing PM schedule, and delete a PM schedule altogether from the list of existing PM schedules for the equipment. When adding a new PM schedule to an equipment record, the Work Order Org. will default to the organization of the equipment if the organization is not common; if the organization is common, you must choose the specific organization for which to generate PM work orders.

PM revision control cannot be active because changing equipment PM schedule relationships demands a new revision of the PM schedule. If PM revision control is active, the PM Schedule page is for informational purposes only.

Note: If you edit the length of a linear equipment record, the system may automatically edit associated PM records when installation parameter PMRVCTRL is set to No. If the new equipment length falls on or within the length of the PM, the system automatically updates the To Point of the PM record based on the new equipment length. If the new equipment length falls outside of the length of the PM, the system does not update the PM record.

To add PM schedules to equipment:

1. Open the Assets, Positions, or Systems form.
2. Select the equipment for which to add a PM schedule, and then click the PM Schedules tab.
3. Click Add PM. The system automatically populates Work Order Org., Department, Location, Loc. Org., Cost Code, Dormant Start, Dormant End, Reuse Dormant Period, and Assigned To if available. The system automatically populates Date of Last Work Order with the Due Date of the current work order for the PM. If the work order is a duplicate PM, the system displays the latest date.

Note: If the system does not automatically populate Work Order Org., you must enter a Work Order Org. to activate the other fields on the form.

4. PM—Enter the PM schedule. The system automatically populates the description, PM Org., Test Point Set, PM Type, Work Order, WO Class, WO Class Org., Supervisor, Meter Interval, and Meter #2 Interval if available.
5. Department—Enter the department.
6. Location—Enter the location. The system automatically populates Loc. Org.
7. Route—Enter the equipment route.
8 Perform Every—Enter the length of the interval of time to pass before the system generates the next PM routine work order, and then select the unit of measure in the adjacent field.

9 Due Date—Enter the due date of the first work order.

Note: Each work order determines the due date of the following work order. If you update the Due Date on the PM Schedules page, the system updates the work order Due Date so that this due date is later than the last work order completion date. The system adds the interval to the entered Due Date on the PM Schedules page until a date later than the last completion date is reached. Future due dates are accepted without validation.

10 Dormant Start—Enter the date on which the dormant period for any PM work orders for the equipment begins.

11 Dormant End—Enter the date on which the dormant period for any PM work orders for the equipment ends.

12 Reuse Dormant Period—Select to use the same specified dormant period for any PM work orders for the equipment on a yearly basis. The system automatically updates the specified Dormant Start and Dormant End dates to future dates after the dormant period for the equipment has elapsed. Additionally, the specified dormant period will be the default dormant period for any new PM equipment records.

13 Test Point Set—Enter the test point set for calibration of the equipment.

Note: If the work order is a calibration work order, the system copies the test points for the specified equipment record to the work order when it is released. The system copies the test points related to the selected Test Point Set.

14 PM Type—Select one of the following options:

- Fixed—Select to issue the PM based on a fixed schedule, e.g., based on date or reading when the last PM was originally due.
- Variable—Select to issue the PM based on a variable schedule, e.g., based on the date or reading on which the last PM was completed.
- Duplicate—Select to allow multiple PM work orders to be open at the same time.

Note: Selecting Duplicate as the PM type enables you to create an exception to the rule that a PM equipment may have only one work order for the PM work order at a time.

15 WO Class—Enter the class of the work order. The system automatically populates WO Class Org.

16 Cost Code—Enter the cost code associated with the PM.

17 Assigned To—Enter the person responsible for the equipment.

18 Supervisor—Enter the supervisor for the equipment.

19 Date Deactivated—Enter a date beyond which to discontinue generation of future PM Work Orders.

20 Meter Interval—Enter the length of the interval of time indicating how frequently the PM is to be performed, and then enter the unit of measure for the meter interval.

21 Meter Due—Enter the reading due value for the first work order.

Note: Each work order determines the due reading of the following work order. If you update Meter Due on the PM Schedules page, the system updates the work order Meter Due so that this due reading is higher than the reading on the last work order completed. The system adds the interval to the entered Meter Due on the Equipment page until a reading higher than the reading on the last work order completed is reached. Future due readings are accepted without validation.
22 **Meter #2 Interval**—Enter the length of the interval of time indicating how frequently the PM is to be performed, and then enter the unit of measure for the meter interval.

23 **Meter #2 Due**—Enter the reading due value for the first work order.

   **Note:** Specify more than one meter interval for a PM. For example, change the oil in a truck every 3000 miles, according to **Meter Interval** and change the oil in the same truck after 720 hours of running time according to **Meter #2 Interval**. You must enter a value for Meter Interval to enter a value for **Meter #2 Interval**.

24 **Perform On**—Enter the week of the month and the day of the week on which to perform the work on the equipment, e.g., 2nd Tuesday of the month due. Select **Last** to handle scenarios in which there are five weeks in a month. The system sets the due date to the last week of the month.

   **Note:** **Perform On** is only available for duplicate PMs, and is not available for daily or weekly frequencies.

25 Enter Linear Reference Details. See "Defining standard work order headers" on page 383.

26 Click **Submit**.

---

**Transferring equipment between organizations**

Transfer equipment between organizations within your company if you use multi-organization security.

You can only transfer equipment records with a system **Status** of **Installed**. You cannot transfer equipment records with any other **Status**. In addition, you cannot transfer any equipment record that meets the following criteria:

- It is flagged as **Out of Service**.
- It is associated with a change notice.
- It has work orders with a system **Status** of **Work Request** or **Released**.
- It has work orders with a system **Status** of **Bypassed** or **Awaiting Execution** and for which there are open purchase orders, purchase requisitions, or items being held in store.
- It has a parent record within an equipment hierarchy.
- It has a child record that has a second parent record.
- It has a child record that belongs to a different organization.
- It has non-superseded PM work orders and PM Revision Control is On.
- It has a child equipment record that already exists in the new organization.
- It already exists in the new organization, but its children do not.
- It already exists in the new organization with a system **Status** of **Awaiting Purchase**, **Installed**, or **In Store**.

   **Note:** You can transfer an equipment record that has child records in an equipment hierarchy; however, the child equipment records must meet the same criteria as noted above.
Understanding equipment transfer

See the following list of processing rules that the system follows when an equipment record is transferred between organizations:

- The system maintains a record of the equipment in the originating organization with a system Status of Withdrawn, flags the equipment record as Out of Service, and automatically populates the equipment record’s Transfer Date.
- The system transfers child equipment records and retains the equipment hierarchy in the new organization.
- The system creates an event record of the transfer in both the originating organization (event type is ATT) and new organization (event type is ATF). The system maintains the event history of the equipment record in the originating organization, and then copies the event history to the equipment record in the new organization.
- The system automatically converts currency-based fields from the currency of the originating organization to the currency of the new organization if an exchange rate exists.
- The system completes any PM work orders associated with the transferred equipment that have a system Status of Awaiting Execution or Bypassed. The system adds a comment to the work order to indicate it was automatically completed because of the organization transfer.
- The system automatically copies depreciation setup data defined on the Depreciation page of the Assets, Positions, or Systems form, and then recalculates the depreciation of the equipment record within the new organization based on the Commission Date of the equipment record.
- The system removes the transferred equipment record from any shutdown lists on which it is referenced.

The system automatically copies equipment information defined on the Record View page of the Assets, Positions, or Systems form to the equipment record within the new organization.

**Note:** The system only copies information that is valid within the equipment record’s new organization. If the equipment record contains information that is not valid within the new organization, the system completes the transfer without copying the invalid information.

See the following list of additional data that is copied during the transfer if applicable:

- Addresses
- Calibration data (except for Next Cal. Due)
- Comments
- Custom Fields
- Depreciation setup data
- Documents
- Equipment Details for Monitored Equipment
- Logical Meters
- Parts Associated
- Permits
- Physical Meters that belong to common organizations
- Test Point Data
The system does not automatically copy all data associated with an equipment record during the transfer. See the following list of data that the system does not copy to the equipment record within the new organization:

- Account Details
- Electronic signatures
- Electronic records
- Audit trail information
- Preventive Maintenance records
- Inspections data
- Physical Meters that belong to specific organizations

Transferring equipment

To transfer equipment:

1. Open the Assets, Systems, or Positions form.
2. Select the equipment record to transfer, and then click the Record View tab.
3. Right-click, and then select Transfer Equipment. The system automatically populates the Equipment Details and the Current Org. Details.
4. **Organization**—Enter the organization to which to transfer the equipment. The system enables Status and automatically populates Department, Part, Cost Code, and Manufacturer if the information defined on the equipment record is valid within the new Organization.
5. **Status**—Select the equipment record’s status.
6. **Department**—Enter the equipment record’s department.
7. **Part**—Enter the equipment record’s part number.
8. **Cost Code**—Enter the equipment record’s cost code.
9. **Manufacturer**—Enter the manufacturer of the equipment.
10. Click Transfer.

Creating equipment configurations

Create equipment configurations to use as equipment templates. After creating an equipment configuration, use it to quickly define assets, positions, and systems that require the same information as is contained on the equipment configuration template.

To create equipment configurations:
1 Open the Equipment Configurations form.
2 Click New Record.
3 **Equipment Configuration**—Enter a unique code identifying the equipment configuration, and then enter a description in the adjacent field.
4 **Status**—Select the equipment configuration status.
5 **Organization**—Enter the organization to which the equipment configuration belongs if you use multi-organization security.
6 **Department**—Enter the equipment's department.
7 **Class**—Enter the class of the equipment. The system automatically populates **Class Org**.
8 **Category**—Enter the category for the equipment.
9 **Cost Code**—Enter the equipment's cost code.
10 **Equipment Value**—Enter the value of the equipment (generally, purchase price).
11 **Assigned To**—Enter the person responsible for the equipment.
12 **Meter Unit**—Enter the meter unit of the equipment to define with this equipment configuration.
13 **Criticality**—Enter a criticality code to indicate the relative importance of the equipment to the overall production of goods or services for your organization.
14 **Dormant Start**—Enter the date on which the dormant period for any PM work orders for the equipment begins.
15 **Dormant End**—Enter the date on which the dormant period for any PM work orders for the equipment ends.
16 **Reuse Dormant Period**—Select to use the same specified dormant period for any PM work orders for the equipment on an annual basis.
17 **Production**—Select if the equipment is used in production.
18 **Safety**—Select to observe safety precautions when working with this equipment.
19 **cGMP**—Select to indicate that the equipment is subject to cGMP standards. The system automatically populates **Created By**, **Date Created**, **Updated By**, and **Date Updated**.
20 **Prevent non-PM WO Completion**—Select to prevent non-PM WO completion.
21 **System Level**, **Assembly Level**, and **Component Level**—Enter the VMRS codes identifying the system, assembly, and component levels for the equipment. The system automatically populates **EMRS Description**.
22 **Vehicle**—Select if the equipment is a vehicle.
23 **Component Location**—Enter the component location for the equipment.
24 **Alias**—Enter an alias for the equipment.
25 **Out of Service**—Select to prevent the equipment configuration from being displayed in the lookups.
26 **Manufacturer**—Enter the equipment's manufacturer.
27 **Model**—Enter the equipment's model number.
28 **Model Revision**—Enter the equipment's model revision number.
29 **Part**—Enter the part to associate with this equipment configuration. The system automatically populates **Part Org**. You cannot enter a part if **Equipment Type** is position or system.
30 **Equipment Type**—Enter the equipment object type for the equipment.
31 **Equipment Prefix**—Enter a unique prefix code for the equipment. The system automatically populates **Sample Code**.
32 **Equipment Suffix**—Enter a unique suffix code for the equipment.

33 **Sequence Length**—Enter the sequence length that will be used when **Auto Number** is unselected.

34 **Equipment Status**—Enter the default status you want generated with the equipment.

35 **Create as Specific**—Select to indicate that the organization of the equipment during the generation process will be set to a specific organization.

36 **Auto Number**—Select to have the system automatically assign the next available equipment number as the new equipment number. The system automatically clears **Sample Code**.

37 **Commissioning WO**—Enter the commissioning WO.

38 **Key 1** through **Key 6**—Enter additional information that can be used to identify the configuration if you use the data collection interfaces.


40 **Rental Equipment**—Select to indicate that the equipment is rental equipment.

41 **Rental Template**—Enter the template to associate with the rental equipment. The system automatically populates **Rental Template Org**.

42 **Contract Equipment**—Select to indicate that the equipment is contract equipment.

43 **Contract Template**—Enter the template to associate with the contract equipment. The system automatically populates **Contract Template Org**.

44 **Customer**—Enter the customer code. The system automatically populates **Customer Org**.

45 **Calendar Group**—Enter the calendar group for the equipment. The system automatically populates **Calendar Group Org**.

46 **Penalty Factor**—Enter the penalty factor for the equipment.

47 **Minimum Penalty**—Enter the minimum penalty amount that must be met before a penalty can be deducted from the maintenance fee.

48 **Service Delivery Matrix**—Select to restrict work orders for the equipment to a pre-defined service delivery matrix.

49 **Replacement Value**—Enter the current replacement value for the equipment.

50 **Utility Bill Level**—Select to mark the equipment as having capabilities to record utility bills.

51 **GAS Tracked**—Select to set the equipment as GAS (Global Asset Sustainability) Tracked.

52 **Floor Area**—Enter the floor area, and then enter the unit of measure for the floor area.

53 **Estimated Revenue**—Enter the estimated revenue the piece of equipment can generate.

54 **Region**—Enter the region for the equipment. The system automatically populates Region Org.

55 **Primary Use**—Enter the primary use for the equipment.

56 **Year Built**—Enter the year built for the equipment.

57 **Service Life (years)**—Enter the service life of the equipment.

58 **Lock Reliability Ranking Values**—Select to lock the reliability ranking values for the equipment on the **Reliability Survey** tab of the **Equipment** screen.

59 **Reliability Ranking**—Enter the reliability ranking code for the equipment.

60 **Target Power Factor**—Enter the target power factor that has been determined for the equipment.

61 **Target Peak Demand (W)**—Enter the target peak demand in watts for the equipment.

62 **Start Billing Period**—Enter the date that the billing period begins. The Peak Demand measurements are relevant after this date.
63 **Bill Every**—Enter the length of the interval of time to pass before the system expects the next bill, and then select the unit of measure in the adjacent field.

64 **Eff. Loss 1% Phase Imb.**—Enter the efficiency loss per 1 percent imbalance.

65 **Eff. Loss 2% Phase Imb.**—Enter the efficiency loss per 2 percent imbalance.

66 **Eff. Loss 3% Phase Imb.**—Enter the efficiency loss per 3 percent imbalance.

67 **Eff. Loss 4% Phase Imb.**—Enter the efficiency loss per 4 percent imbalance.

68 **Eff. Loss 5% Phase Imb.**—Enter the efficiency loss per 5 percent imbalance.

69 **Performance Manager**—Enter the energy performance manager who is responsible for the equipment.

70 **Electric Sub-meter Interval**—Enter the length of the interval of time in minutes indicating how frequently the electric sub-meter is read.

71 **Electric Usage Threshold**—Enter the current in amps above which the equipment is considered running (on).

72 **Revision Reason**—Enter the reason for revision. The system automatically populates the revision number, **Requested By**, **Date Requested**, **Approved By**, and **Date Approved**.

73 Click **Save Record**.

---

**Associating child equipment with equipment configurations**

Associate child equipment with equipment configurations if you want to break down the configuration structure of the parent. Child equipment records may also have children of their own. Create equipment configurations before associating child equipment with equipment configurations. If the equipment configuration status is not Unfinished, you cannot associate child equipment with equipment configurations.

To associate child equipment with equipment configurations:

1. Open the **Equipment Configurations** form.
2. Select the equipment configuration for which to associate child equipment, and then click the **Configurations Associated** tab.
3. Click **Add Configuration**.
4. **Configuration**—Enter the equipment configuration. The system automatically populates the description, **Configuration Org.**, **Revision**, **Description**, and **Status**.
5. Use Approved Revision—Select this checkbox to indicate that the current approved revision should always be used for the equipment configuration.
6. Dependent—Select this checkbox to generate the child as a dependent of the parent.
7. Cost Roll-up—Select this checkbox to roll costs collected for equipment up the tree and to have the charges applied to the parents of the equipment.
8. **System Level**, **Assembly Level**, and **Component Level**—Enter the VMRS codes identifying the system, assembly, and component levels for the equipment. The system automatically populates the **EMRS Description**.
9. **Component Location**—Enter the component location for the equipment.
10. Click **Submit**.
Viewing equipment configuration hierarchies

View structure details for equipment configuration hierarchies. The structure will display equipment configuration records, component locations, and system, assembly, and component levels. Select equipment configuration or part records within the hierarchy to retrieve the forms within the system.

To view equipment configuration hierarchies:

1. Open the Equipment Configurations form.
2. Select the record for which to view the equipment configuration hierarchy, and then click the Structure tab.
3. View the equipment configuration hierarchy.

Defining logical meters for equipment configurations

If the equipment configuration status is not Unfinished, you cannot define logical meters for equipment configurations.

To define logical meters for equipment configurations:

1. Open the Equipment Configurations form.
2. Select the equipment configuration with which to link a meter, and then click the Meters tab.
3. Click Add Meter.
4. UOM—Enter the unit of measure for the logical meter.
5. Type of Meter—Select one of the following meter types:
   • Standalone—Select so that the equipment will not receive meter readings based on its established parent equipment meters of the same UOM, nor will it send meter readings to any of its established child equipment meters of the same UOM.
   • Parent—Select to send the equipment’s meter readings down to child equipment. If you have parent/child relationships among equipment, enter meter readings for the parent piece of equipment only when adding meter readings.
   • Child—Select to enable the child equipment to receive usage information from a higher-level piece of equipment. The child equipment’s unit of measure (UOM) must match that of the parent.
   • Parent & Child—Select to receive meter readings based on entries made for its parent equipment meters of the same UOM, and it will send meter readings to its children.
6. Click Submit.
Adding calendar-based warranty coverage to equipment configurations

If the equipment configuration status is not Unfinished, you cannot add calendar-based warranty coverage.

**Note:** To manage warranties from the perspective of the warranty record, select **Equipment > Warranty > Warranties**.

To add calendar-based warranty coverage to equipment configurations:

1. Open the **Equipment Configurations** form.
2. Select the equipment configuration for which to add a warranty, and then click the **Warranties** tab.
   The system automatically populates **Date Entered** and **Entered By**.
3. Click **Add Warranty Coverage**.
4. **Warranty**—Enter the warranty document to associate with the equipment configuration. The system automatically populates the warranty description, **Duration UOM**, **Threshold UOM**, **Manufacturer**, and **Supplier**.
5. **Coverage Type**—Select Calendar to indicate that the warranty is based on number of days used.
6. **Duration**—Enter the length of the warranty in days.
7. **Threshold**—Enter the number of days prior to expiration at which the system should notify you that the warranty is about to expire.
8. **Active**—Select to indicate that the warranty is currently active.
9. Click **Submit**.

Adding usage-based warranty coverage to equipment configurations

If the equipment configuration status is not Unfinished, you cannot add calendar-based warranty coverage.

**Note:** To manage warranties from the perspective of the warranty record, select **Equipment > Warranty > Warranties**.

To add usage-based warranty coverage to equipment configurations:

1. Open the **Equipment Configurations** form.
2. Select the equipment configuration for which to add a warranty, and then click the **Warranties** tab.
   The system automatically populates **Date Entered** and **Entered By**.
3. Click **Add Warranty Coverage**.
4. **Warranty**—Enter the warranty document to associate with the equipment configuration. The system automatically populates the warranty description, **Duration**, **Threshold**, **Manufacturer**, and **Supplier**.
5. **Coverage Type**—Select Usage to indicate that the warranty is based on actual usage.
6. **Active**—Select to indicate that the warranty is currently active.
7. **Duration UOM**—Enter the usage length of the warranty and the usage unit of measure.
8 **Threshold UOM**—Enter the amount of usage quantity prior to expiration at which the system should notify you that the warranty is about to expire.

9 Click **Submit**.

---

**Generating equipment using equipment configurations**

Generate equipment quickly in a central location using equipment configurations.

To generate equipment using equipment configurations:

1 Open the **Equipment Generation** form.
2 Click **New Record**.
3 **Session**—The system automatically populates this field. In the adjacent field, enter a description of the session to identify the equipment generation.
4 **Organization**—Enter the organization to which the equipment generation belongs.
5 **Configuration**—Enter the equipment configuration for which to generate equipment. The system automatically populates the description, **Configuration Org.**, **Revision**, and **Configuration Status**.
6 **Equipment Department**—Enter the equipment’s department.
7 **Commission Date**—Enter the commission date.
8 **Equipment Status**—Enter the status of the equipment.
9 **Generate Count**—Enter the number of equipment you want to generate from the selected configuration.
10 **All Specific**—Select this checkbox to indicate that the equipment will be generated in the specific organization of the session. If All Specific is not selected, the equipment will be generated in the organization of the selected configurations and its children.
11 **Equipment Location**—Enter the location of the equipment.
12 **Equipment Cost Code**—Enter the cost code of the equipment.
13 **Equipment Assigned To**—Enter the person responsible for the equipment.
14 **Store**—Enter the store for the equipment.
15 **Bin**—Enter the bin storing the equipment.
16 **Lot**—Enter the lot number or batch of the equipment.
17 **Create Commissioning WO**—Select this checkbox to create a commissioning work order.
18 **Commissioning WO Status**—Enter the status of the commissioning work order.
19 **Commissioning WO Department**—Enter the commissioning work order’s department.
20 **Commissioning WO Location**—Enter the location of the commissioning work order.
21 **Commissioning WO Cost Code**—Enter the cost code of the commissioning work order.
22 **Commissioning WO Assigned To**—Enter the person responsible for the commissioning work order.
23 **Commissioning WO Assigned By**—Enter the supervisor who assigned the commissioning work order.
Defining equipment details for equipment generation

Define details for the equipment on all levels in the structure. Details relate to equipment attributes such as department, cost code, and the person assigned to the equipment. You can assign different attributes to the children and the parent equipment.

To define equipment details for equipment generation:

1. Open the Equipment Generation form.
2. Select the record for which to define equipment details, and then click the Details tab.
3. Equipment Location—Enter the location for the equipment.
4. Equipment Department—Enter the department for the equipment.
5. Equipment Cost Code—Enter the cost code for the equipment.
6. Equipment Assigned To—Enter the name of the person to whom the equipment is assigned.
7. Click Submit.
8. Click Create/Refresh Preview if the tab is empty.

Previewing equipment generations

Preview a list of equipment that will be created during the equipment generation session. After verifying the equipment data, click Generate Equipment to have the record added to the database.

To preview equipment generations:

1. Open the Equipment Generation form.
2. Select the record for which to preview for the equipment generation, and then click the Preview tab.
3. View the equipment data.
4. Click **Create/Refresh Preview** if the tab is empty.
5. Click **Generate Equipment**.

### Tracking asset depreciation

Depreciation enables you to calculate equipment depreciation expense, which is the value of the wear and deterioration of a piece of equipment based on an accounting period and the useful life of the piece of equipment.

**Note:** The system does not roll up depreciation costs within an equipment hierarchy. Maintain individual depreciation records for all assets, positions, or systems for which you need to maintain depreciation data.

The system provides four depreciation methods for your equipment. See "Understanding depreciation methods and daily calculations" on page 133

Create depreciation types based on the agency to which the depreciation data must be reported, e.g., create depreciation types for generally accepted accounting practices (GAAP) and/or a local, federal, state, or international government agency.

**Note:** Depreciation types are linked to the DETP entity for which you must define your depreciation type codes. Contact your system administrator for more information.

For all depreciation methods and types, the system can calculate depreciation data based on months or fiscal years of the asset’s organization. The system begins calculating the depreciation of a piece of equipment on its **Commission Date** and continues calculating the equipment’s depreciation until the piece of equipment reaches its **Sold/Scrap Date** or its end of life date.

**Note:** The system calculates an asset’s end of life date based on the following equation:

\[
\text{End of Life Date} = \text{Commission Date} + (\text{Est. Useful Life} - 1 \text{ day})
\]

Specify the **Commission Date** and **Sold/Scrap Date** on the Assets, Positions, or Systems form. See "Defining assets" on page 85, "Defining positions" on page 89, or "Defining systems" on page 92 earlier in this chapter for more information. Specify the **Est. Useful Life** on the **Depreciation** page of the **Assets** form. Refer to "Entering depreciation data" on page 137.

Base depreciation calculations on an estimated useful life of days, weeks, months, quarters, or years. Regardless of the unit of measure you select, the system calculates a daily depreciation expense upon which all depreciation and book value calculations are based. The system calculates the annual depreciation expense based on the depreciation method you select, and then calculates a daily depreciation expense. See "Understanding depreciation methods and daily calculations" on page 133.

Once the system calculates a piece of equipment’s daily depreciation expense, it can calculate periodic depreciation expenses and book values. See "Understanding periodic depreciation and book value calculations" on page 135.
Understanding depreciation methods and daily calculations

Not all calendar years consist of 365 days, e.g., leap years consist of 366 days. Therefore, the system must calculate a daily depreciation expense upon which periodic depreciation expense and book values are calculated.

The system calculates the annual depreciation rate based on the depreciation method you select, and then calculates the daily depreciation rate based on the following equation:

\[
\text{Daily Depreciation Rate} = \frac{\text{Annual Depreciation Rate}}{\text{Number of Days in the Year}}
\]

Specify the depreciation method that the system should use to calculate the annual depreciation expense on the Depreciation page of the Assets, Positions, or Systems form. See "Entering depreciation data" on page 137 for more information. The system provides four asset depreciation methods: Straight Line, Sum of Years Digits, Double Declining Balance, and Units of Output.

Note: The ASDEPTYP installation parameter determines the default depreciation method for the system; however, you can also set the depreciation method on the organization or equipment level. Setting the depreciation method at the organization level supersedes the setting of the ASDEPTYP installation parameter. Setting the depreciation method at the equipment level supersedes the setting of ASDEPTYP and/or the depreciation method specified for the organization.

Calculating straight line depreciation

Straight Line depreciation, the most commonly used method, calculates depreciation based on the principle that an asset loses an equal amount of value each fiscal year.

The system calculates annual Straight Line depreciation expense based on the following equation:

\[
\frac{\text{Original Value} - \text{Residual Value}}{\text{Estimated Useful Life}} = \text{Annual Depreciation Expense}
\]

Calculating sum of years digits depreciation

Sum of Years Digits depreciation is an accelerated depreciation method, which assumes that assets incur greater depreciation during the early years of the asset's life.

To calculate the Sum of Years Digits depreciation, the system must first calculate the Sum of Years Digits and the remaining years of life.

The system calculates the Sum of Years Digits using the following equation:

\[
\text{Est. Useful Life in Years} \times \left(\frac{\text{Est. Useful Life in Years} + 1}{2}\right) = \text{Sum of Years Digits}
\]

Using this equation, the Sum of Years Digits for an asset with an expected useful life of five years is calculated as follows:

\[
5 \text{ years} \times \left(\frac{5 \text{ years} + 1}{2}\right) = 15 \text{ years}
\]
Note: Quickly determine the Sum of Years Digits value by adding together the numbers representing the years of an asset's useful life, e.g., if an asset is expected to have a useful life of five years, the digits representing that useful life are: 1, 2, 3, 4, and 5. To determine the Sum of Years Digits value, add the digits: 1 + 2 + 3 + 4 + 5 = 15.

The system determines an asset's remaining years of life based on its expected useful life, e.g., for an asset whose expected useful life is five years, the remaining years of life is 5 for the first year, 4 for the second year, 3 for the third year, etc.

The system then calculates the Sum of Years Digits depreciation based on the following equation:

\[(Original \ Value - Residual \ Value) \times Remaining \ Years \ of \ Life \ / \ Sum \ of \ Years \ Digits = Annual \ Depreciation \ Expense\]

Calculating double declining balance depreciation

Double Declining Balance depreciation is the most accelerated method of depreciation. Using the Double Declining Balance method, an asset depreciates twice the rate of the Straight Line depreciation method rate each year.

To calculate the Double Declining Balance depreciation, the system must first calculate the annual Straight Line depreciation rate.

The system calculates the annualized Straight Line depreciation rate based on the following equation:

\[1 \div \text{Est. Useful Life in Years} = \text{Annual Straight Line Depreciation Rate}\]

The system then calculates the Double Declining Balance depreciation expense based on the following equation:

\[\text{Book value} \times (2 \times \text{Annual Straight Line Depreciation Rate}) = \text{Annual Depreciation Expense}\]

Calculating units of output depreciation

The Units of Output method is also known as the productive output, units of production, or units of activity method. It calculates depreciation based on equipment output during a period of time, while considering the equipment’s estimated lifetime units of output. Companies commonly use the Units of Output method when usage varies dramatically from period to period.

Note: The Units of Output method cannot project depreciation over the remaining asset life. The Units of Output must be entered before the system can calculate period depreciation.

To calculate Units of Output depreciation, the system must calculate a depreciation cost per unit based on the following equation:

\[(Original \ Value - Residual \ Value) \ / \ Estimated \ Lifetime \ Output = Depreciation \ Expense \ per \ Unit\]

The system then calculates the units of output depreciation expense for a period based on the following equation:
Depreciation Expense per Unit x Units of Output = Depreciation Expense

Understanding periodic depreciation and book value calculations

The system calculates depreciation expenses based on a depreciation period, a generic term that refers to an organization’s fiscal years or calendar month. Select to view depreciation expenses based on the depreciation period you prefer. See "Viewing depreciation details" on page 139.

To calculate an asset’s periodic depreciation expense and book value, the system must first calculate the daily depreciation expense of the asset. See "Understanding depreciation methods and daily calculations" on page 133.

The system must also calculate the number of days in the period before calculating an asset’s periodic depreciation expense or book value.

**Note:** When calculating the number of days in a period, the system includes the first and final day in its tally, e.g., the system counts the time between July 1, 2004 and July 2, 2004 as 2 days.

For most periods of an asset’s life, the number of days in the period equals the number of days in the calendar month or fiscal year defined for your organization, e.g., if you view depreciation expenses based on calendar month, the number of days in the period is 30 or 31. If you view depreciation expenses based on fiscal year and the fiscal year for your organization contains 365 days, the number of days in the period is 365.

The number of days falling in the first and last period of an asset’s life, however, usually does not equal a full 365, 30, or 31 days. The system calculates the number of days in the first period based on the following equation:

**Number of Days in First Period = Number of Days Between Commission Date and Period End Date**

The system calculates the number of days in the last period based on one of the following equations:

**Number of Days in Last Period = Number of Days Between Period Start Date and Sold/Scrap Date**

—Or—

**Number of Days in Last Period = Number of Days Between Period Start Date and the Asset’s End of Life Date**

Once the system calculates the number of days in each period, it can calculate the asset’s depreciation expense and book values. See the sections below for examples.

Calculating periodic depreciation expense

The system calculates the periodic depreciation expense based on the following equation:

**Periodic Depreciation Expense = Daily Depreciation Rate x Number of Days in Period**
**Note:** If you view depreciation calculations based on fiscal years, the system may have to further divide each period into two segments to calculate the depreciation expense. If an asset’s year of life, as defined by its Commission Date, and fiscal year do not coincide, the system must calculate two periodic depreciation expenses for each year of the asset’s life, e.g., your asset’s Commission Date is 5/1/02. Therefore, its first year of life runs from 5/1/02 through 4/30/03. The fiscal year of the asset runs from 11/1 through 10/31. Therefore, the system must calculate the asset’s depreciation expense from 5/1/02 to 10/31/02 and then again from 11/1/02 to 4/30/03.

If you select Double Declining Balance as your Depreciation Method, the calculated periodic depreciation expense for the last period of an asset’s life may cause the Book Value of the asset to be less than its Residual Value. In this case, the system adjusts the depreciation expense of the last period so the asset’s Book Value equals its Residual Value.

**Example:**

See the following information to determine an asset’s periodic depreciation expense for the years 2003, 2004, and 2005:

- The fiscal year of the asset’s organization begins September 1 and ends August 31.
- The Commission Date for the asset is 02-JUL-2003.
- The Sold/Scrap Date of the asset is 02-SEP-2005.
- The daily depreciation expense of the asset is 17.60 USD.

To determine the depreciation expense for the year 2003, the system performs the following calculation:

\[
\text{2003 Depreciation Expense} = \text{Daily Depreciation Expense} \times \text{Number of Days Between Commission Date and Period End Date}
\]

\[
\text{2003 Depreciation Expense} = 17.60 \text{ USD} \times 61
\]

\[
\text{2003 Depreciation Expense} = 1,073.60 \text{ USD}
\]

To determine the depreciation expense for the year 2004, the system performs the following calculation:

\[
\text{2004 Depreciation Expense} = \text{Daily Depreciation Expense} \times \text{Number of Days in Period}
\]

\[
\text{2004 Depreciation Expense} = 17.60 \text{ USD} \times 366
\]

\[
\text{2004 Depreciation Expense} = 6,441.60 \text{ USD}
\]

**Note:** Because 2004 is a leap year and February 2004 occurs within the organization’s 2004 fiscal year, the number of days in the period is 366.

To determine the depreciation expense for the year 2005, the system performs the following calculation:

\[
\text{2005 Depreciation Expense} = \text{Daily Depreciation Expense} \times \text{Number of Days Between Period Start Date and Sold/Scrap Date}
\]

\[
\text{2005 Depreciation Expense} = 17.60 \text{ USD} \times 2
\]

\[
\text{2005 Depreciation Expense} = 35.20 \text{ USD}
\]
Calculating book values

The first time the system calculates the book value of an asset, it calculates based on the following equation:

\[ \text{Book Value} = \text{Original Value} - \text{Periodic Depreciation Expense} \]

For all subsequent book value calculations of the asset, the system uses the following equation:

\[ \text{Book Value} = \text{Book Value from Previous Period} - \text{Periodic Depreciation Expense} \]

Example

See the following information to determine an asset's book value at the end of the 2003, 2004, and 2005:

- The Original Value of the asset is 10,000 USD.
- The depreciation expense for 2003 is 1,073.60 USD; the depreciation expense for 2004 is 6,441.60 USD; and the depreciation expense for 2005 is 35.20 USD as taken from the example in "Calculating Periodic Depreciation Expense" earlier in this chapter.

To determine the asset's book value at the end of 2003, the system performs the following calculation:

\[ 2003 \text{ Book Value} = \text{Original value} - 2003 \text{ Periodic Depreciation Expense} \]
\[ \text{Book Value} = 10,000 \text{ USD} - 1073.60 \text{ USD} \]
\[ \text{Book Value} = 8,926.40 \text{ USD} \]

To determine the asset's book value at the end of 2004, the system performs the following calculation:

\[ 2004 \text{ Book Value} = 2003 \text{ Book Value} - 2004 \text{ Periodic Depreciation Expense} \]
\[ \text{Book Value} = 8,926.40 \text{ USD} - 6,441.60 \text{ USD} \]
\[ \text{Book Value} = 2,484.80 \text{ USD} \]

To determine the asset's book value at the end of 2005, the system performs the following calculation:

\[ 2005 \text{ Book Value} = 2004 \text{ Book Value} - 2005 \text{ Periodic Depreciation Expense} \]
\[ \text{Book Value} = 2,484.80 \text{ USD} - 35.20 \text{ USD} \]
\[ \text{Book Value} = 2,449.60 \text{ USD} \]

Entering depreciation data

Enter basic depreciation data for your equipment. The system calculates depreciation rates based on the information you enter. See "Understanding depreciation methods and daily calculations" on page 133, and "Understanding periodic depreciation and book value calculations" on page 135.

Create multiple depreciation schedules for a single piece of equipment as necessary, e.g., you need to report depreciation information to GAAP and a state agency for a CHILLER. GAAP requires that you use the Straight Line method, but the state agency requires that you use the Double Declining Balance
method. Create one depreciation schedule for the CHILLER using the GAAP type and Straight Line method and a second depreciation schedule using the state agency type and the Double Declining Balance method.

If you update Original Value, Est. Useful Life, the unit of measure, or Residual Value, the system automatically recalculates depreciation values.

**Note:** You can also manually recalculate depreciation values for all the equipment records in an organization for which you have defined depreciation data by clicking the Recalculate Depreciation Data on the Fiscal Years page of the Organizations form. See Defining fiscal years for asset depreciation Chapter 2 System security of the System Administrator's Guide.

To enter depreciation data:

1. Open the Assets, Positions, or Systems form.
2. Select the asset, position, or system for which to enter depreciation data, and then click the Depreciation tab.
3. Click Add Depreciation Type.
4. **Depreciation Method**—Select the depreciation method for the depreciation schedule. See "Understanding depreciation methods and daily calculations" on page 133 for more information about depreciation methods.
5. **Original Value**—Enter the original value of the asset.
6. **Est. Useful Life**—Enter the estimated useful life of the asset, and then select the unit of measure of the estimated useful life in the adjacent field. If you select Days or Months as the unit of measure, you must enter the estimated useful life as a positive integer. If you select Weeks, Quarters, or Years, you can enter the estimated useful life as a decimal.

   **Note:** If you select Weeks, Months, Quarters, or Years as the unit of measure, the system must convert the estimated useful life into number of days in order to calculate depreciation expenses. The system is able to automatically convert months into the appropriate number of corresponding days without performing any calculations. If you select Weeks, Quarters, or Years, the system must convert the unit of measure into days or months in order to determine the corresponding number of days.

   Refer to the following for more information:
   - **Weeks**—The system must convert the estimated useful life into days. The system multiplies the number you enter by 7 to determine the equivalent number of days, and then rounds the result to the nearest positive integer, e.g., .1 weeks x 7 = .7 days, which the system rounds to 1 day.
   - **Quarters**—The system must convert the estimated useful life into months. The system multiplies the number you enter by 3 to determine the number of months, and then rounds to the nearest positive integer, e.g., .4 quarters x 3 = 1.2 months, which the system rounds to 2 months.
   - **Years**—The system must convert the estimated useful life into months. The system multiplies the number you enter by 12 to determine the number of months, and then rounds to the nearest positive integer, e.g., .4 years x 12 = 4.8 months, which the system rounds to 5 months.

7. **Residual Value**—Enter the estimated value of the asset at the end of its useful life.
8. **Est. Lifetime Output**—Enter the units of output you estimate the equipment will produce over its lifetime if you selected Units of output as the Depreciation Method.
9. **Depreciation Type**—Select a depreciation type.
Note: Depreciation types are linked to the DETP entity for which you must define your depreciation type codes. Contact your system administrator for more information.

10 Click Submit.

Viewing depreciation details

View depreciation details based on the fiscal year defined for your organization or for each month of the fiscal year defined for your organization.

See "Understanding periodic depreciation and book value calculations" on page 135 for an explanation of how the system calculates depreciation expense and book value.

If you update an asset’s Original Value, Est. Useful Life, the unit of measure, Residual Value, or Commission Date, the system recalculates depreciation values.

Note: If you update an asset’s values, the system displays the new depreciation calculations. You cannot access the asset’s former depreciation calculations. Likewise, if you transfer an asset to a new organization, the system calculates depreciation based on the fiscal year of the asset’s new organization. You cannot access the asset’s former depreciation calculations.

To view depreciation details:

1 Open the Assets, Positions, or Systems form.

2 Select the asset, position, or system for which to view depreciation details, and then click the Depreciation tab.

3 Select the depreciation record for which to view depreciation details, and then click ViewDepreciationDetails.

4 Fiscal Years or Months—Select to view the depreciation details based on fiscal years or months. The system automatically populates Depreciation (To Date), Depreciation (Period To Date), and Book Value (To Date) based on the following equations:

<table>
<thead>
<tr>
<th></th>
<th>Straight Line, Sum of Years Digits, and Double Declining Balance</th>
<th>Units of Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depreciation (To Date)</td>
<td>Daily Depreciation Rate x Number of Days Between Commission Date and Current Date</td>
<td>Depreciation Per Unit * Units of Output in the period (where Depreciation per Unit =) through n (where n= fiscal year prior to current fiscal year) + Depreciation for the Current Fiscal Year through Today’s Date</td>
</tr>
</tbody>
</table>

See "Calculating units of output depreciation" on page 134
Note: For the current fiscal year, depreciation uses the following equation:

Average Number of Units Produced per Day * Number fiscal through today's date * Depreciation per Unit where:

Average Number of Units per day = entered Units of Output
total days in Fiscal Year

Number of Fiscal Year days through Today's Date = Today's Date – Commission Date of Fiscal Year Start Date, whichever is greater + 1

Depreciation Per Unit = (Original Value – Residual Value) / Estimated Lifetime Value

<table>
<thead>
<tr>
<th>Depreciation (Period To Date)</th>
<th>Daily Depreciation Rate x Number of Days Between First Day in the Current Period and the Current Date</th>
<th>See equation in Depreciation (To Date) above for more information on calculating depreciation in current period.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Value (To Date)</td>
<td>Original Value – Depreciation (To Date)</td>
<td>Original Value – Depreciation (To Date)</td>
</tr>
</tbody>
</table>

5 Click Close.

5 Click Close.

Entering units of output

Enter units of output information for equipment if you are tracking its depreciation based on the Units of Output depreciation method.

To enter units of output:

1 Open the Assets, Positions, or Systems form.
2 Select the asset, position, or system for which to enter units of output, and then click the Depreciation tab.
3 Select the depreciation record for which to enter units of output, and then click Units of Output.
4 Click Add Units of Output.
5 **Start Date**—Enter the fiscal year for which to enter units of output. The system automatically populates **EndDate**.

   **Note:** If the fiscal year’s **EndDate** is later than today’s date, the system calculates **Depreciate (To Date)**, **Depreciation (Period To Date)**, and **Book Value (To Date)** based on the entire length of the fiscal year. See "Viewing depreciation details" on page 139

6 **Units of Output**—Enter the number of units produced by the piece of equipment.
7 Click **Submit**. The system updates the Units of Output list.
8 Click **Close**.

---

### Defining and managing change notices

Vendors use change notices to notify their customers of possible defects in their equipment or to recommend changes to previously documented maintenance plans. Change notices can be recorded in the system once they are issued from the vendor. Identify equipment affected by the change notices, reference change notices on work orders, and track transactions and events associated with change notices.

### Defining change notices

Define change notices, setting up selection criteria for the assets to which to associate the change notice.

To define change notices:

1. Open the **Change Notices** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the change notice belongs if you use multi-organization security.
4. **Change Notice**—Enter a unique number identifying the change notice, and then enter a description of the reason for the change notice in the adjacent field.
5. **Status**—Select the status for the change notice.
   **Note:** You can only create change notices in an Unfinished status.
6. **Class**—Enter the class of the change notice. The system automatically populates **Class Org**.
7. **Manufacturer**—Enter the manufacturer of the assets affected by the change notice.
8. **StartDate** and **EndDate**—Enter the dates during which the manufacturer repairs or replaces assets affected by the change notice. The system automatically populates **Close Date** when **Status** changes to Closed.
9. **Filter Assets by Manufacturer**—Select to include only equipment with the entered manufacturer on the list of equipment for the change notice.
10 Click **Save Record**.

### Adding lines for change notices

Details on this form specify which assets to be included on a change notice. You can specify ranges for asset numbers, serial numbers, and part numbers.

To add lines for change notices:

1. Open the **Change Notices** form.
2. Select the change notice for which to add a line, and then click the **Lines** tab.
3. Click **Add Line**.
4. Choose one of the following options:
   - **From Asset** and **To Asset**—Enter the starting number and ending number for the range of assets to include.
   - **From Serial Number** and **To Serial Number**—Enter the starting number and ending number for the range of serial numbers to include.
5. **Part**—Enter the part number for the part affected by the change notice. The system automatically populates **Part Org**.
6. Click **Submit**.

### Viewing assets for change notices

View a list of assets associated with a specific change notice.

To view assets for change notices:

1. Open the **Change Notices** form.
2. Select the change notice for which to view assets, and then click the **Assets** tab.
3. View the asset information.

### Defining locations for change notices

Change notice locations filter the types of equipment that can be added to change notices. If Location is populated, assets are restricted to valid locations.

To define locations for change notices:

1. Open the **Change Notices** form.
2. Select the change notice for which to define locations, and then click the **Locations** tab.
3. Click **Add Location**.
4 **Location**—Enter the location for which assets can be included. The system automatically populates the location description.

5 **Click Submit.**

---

**Designing energy consumption for equipment**

Design energy consumption information for equipment that are flagged as **GAS Tracked**. Record the equipment manufacturer’s energy efficiency specifications to indicate the level of energy efficiency the equipment should maintain while operating when using specific energy commodities, such as electricity, gas, etc.

You can also link equipment with a utility bill source to tie the equipment to the utility billing information/rates for the utility bill source, e.g., a building in which the equipment is located.

**Note:** The link between the equipment and utility bill source established on the **Design Consumption** page is simply a link between the equipment related to energy consumption and is not a structural link as defined in an equipment hierarchy.

To design energy consumption for equipment:

1 **Open the Assets, Positions, or Systems form.**

2 **Select the equipment for which to add design consumption, and then click the Design Consumption tab.** The system automatically populates **Date Effective** with the current date and **Date Expired** with 12/31/2199. You can modify **Date Effective** as necessary.

3 **Utility Bill Source**—Enter the utility bill source to associate with the equipment. The **Utility Bill Source** represents the billing structure established to calculate a daily rate for utility/energy consumption for invoice vouchers. See *Defining Utility Bills for Invoice Vouchers* in Chapter 4 Purchasing Management for more information.

**Note:** If **Utility Bill Level** is not selected for the equipment, then a **Utility Bill Source** is required.

4 **Commodity**—Enter the commodity to associate with the equipment. The system populates the **Commodity UOM** from the selected **Commodity**.

   If a record is inserted and the **Date Effective** and **Date Expired** of the new record overlap with the **Date Effective** and **Date Expired** of another record with the same **Commodity**, the system updates the **Date Expired** of the new record with the oldest **Date Effective** to avoid having an overlap. See "Understanding effective and expiration date calculations for design consumption" on page 145

5 **Design Usage UOM**—Enter the unit of measure to be used for the energy consumption design, e.g., hours. The system populates **Design Consumption UOM** in the format **Commodity UOM/Design Usage UOM**.

6 **Default Load Factor**—Enter the number to default for the maximum factor for the load ranges. This value is used as the default when entering entering records on the Actual Consumption page. The system automatically populates **Range-1 Low**.

7 **Range-1 High**—Enter the maximum load range for range 1.
8 Range-1 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

9 Range-2 Low—Enter the minimum load range for range 2.

10 Range-2 High—Enter the maximum load range for range 2.

11 Range-2 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

12 Range-3 Low—Enter the minimum load range for range 3.

13 Range-3 High—Enter the maximum load range for range 3.

14 Range-3 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

15 Range-4 Low—Enter the minimum load range for range 4.

16 Range-4 High—Enter the maximum load range for range 4.

17 Range-4 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

18 Range-5 Low—Enter the minimum load range for range 5.

19 Range-5 High—Enter the maximum load range for range 5.

20 Range-5 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

21 Range-6 Low—Enter the minimum load range for range 6.

22 Range-6 High—Enter the maximum load range for range 6.

23 Range-6 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

24 Range-7 Low—Enter the minimum load range for range 7.

25 Range-7 High—Enter the maximum load range for range 7.

26 Range-7 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

27 Range-8 Low—Enter the minimum load range for range 8.

28 Range-8 High—Enter the maximum load range for range 8.

29 Range-8 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

30 Range-9 Low—Enter the minimum load range for range 9.

31 Range-9 High—Enter the minimum load range for range 9.

32 Range-9 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

33 Range-10 Low—Enter the minimum load range for range 10.
34 Range-10 High—Enter the maximum load range for range 10.

35 Range-10 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

36 Design Consumption Rate—Enter the energy consumption rate for the equipment. This indicates the amount of the commodity, e.g., electricity, that is consumed in the Design Usage UOM, e.g., hours. For example, an equipment can be designed to use 10KW of electricity per hour.

37 Click Submit.

Note: Click Clear to clear the design consumption details for the selected record.

Setting the GDRV installation parameter to FULL enables the system to purge and recalculate all energy efficiency data (including actual energy consumption records). However, if you are updating a design consumption record, the system does not update data displayed on the Actual Consumption page of the Assets, Positions, or Systems forms. See "Entering actual energy consumption information for equipment" on page 146

Understanding effective and expiration date calculations for design consumption

When entering multiple design consumption records on the Design Consumption page of the Assets, Positions, or Systems forms, the Commodity specified for a record is tied to a Date Effective and Date Expired. This association establishes the valid date ranges for the energy efficiency specifications established for the Commodity. By necessity, these date ranges must be flexible in the ways in which they connect the equipment and the Commodities to which they are linked. Therefore, if you must enter multiple design consumption records on the Design Consumption page for same Commodity, the system must calculate the date ranges for Date Effective and Date Expired based on the existing record(s) and the Date Effective entered for an additional record when there is an overlap between the Date Effective of the existing record and the Date Effective of the additional record(s). Likewise, the same is true for the expiration dates of the existing and additional records. See the following example for more information.

Example 1

In this example, there are two existing design consumption records, and you are inserting a new record. At the time of insert, the date information for the design consumption records is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Date Effective</th>
<th>Date Expired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing record one</td>
<td>01/01/2006</td>
<td>06/30/2006</td>
</tr>
<tr>
<td>Existing record two</td>
<td>07/01/2006</td>
<td>12/31/2199</td>
</tr>
<tr>
<td>Record to be inserted</td>
<td>01/01/2007</td>
<td>12/31/2199</td>
</tr>
</tbody>
</table>

Note: Date Expired is protected. The system defaults 12/31/2199 as the Date Expired for the record to be inserted.
The record to be inserted shares the same **Commodity** as the existing records, and the **Date Effective** of the record to be inserted overlaps with the **Date Effective** and **Date Expired** of the existing records. The system locates the existing record with the same **Commodity** based on the **Date Effective** and updates the **Date Expired** for the second existing record with a new **Date Effective** as follows:

<table>
<thead>
<tr>
<th></th>
<th>Date Effective</th>
<th>Date Expired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing record one</td>
<td>01/01/2006</td>
<td>06/30/2006</td>
</tr>
<tr>
<td>Existing record two</td>
<td>07/01/2006</td>
<td>12/31/2006</td>
</tr>
<tr>
<td>Record inserted</td>
<td>01/01/2007</td>
<td>12/31/2199</td>
</tr>
</tbody>
</table>

**Example 2**

In this example, there are two existing design consumption records, and you are inserting a new record. At the time of insert, the date information for the design consumption records is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Date Effective</th>
<th>Date Expired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing record one</td>
<td>01/01/2006</td>
<td>12/31/2006</td>
</tr>
<tr>
<td>Existing record two</td>
<td>01/01/2007</td>
<td>12/31/2199</td>
</tr>
<tr>
<td>Record to be inserted</td>
<td>06/01/2006</td>
<td>12/31/2199</td>
</tr>
</tbody>
</table>

**Note:** **Date Expired** is protected. The system defaults 12/31/2199 as the **Date Expired** for the record to be inserted.

The record to be inserted shares the same **Commodity** as the existing records, and the **Date Effective** of the record to be inserted overlaps with the **Date Effective** of the existing records. The system locates the existing record with the same **Commodity** based on the **Date Effective** and updates the **Date Expired** of existing record one and the **Date Effective** of existing record two and the data inserted is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Date Effective</th>
<th>Date Expired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing record one</td>
<td>01/01/2006</td>
<td>05/14/2006</td>
</tr>
<tr>
<td>Existing record two</td>
<td>01/01/2007</td>
<td>12/31/2199</td>
</tr>
<tr>
<td>Record inserted</td>
<td>06/01/2006</td>
<td>12/31/2006</td>
</tr>
</tbody>
</table>

**Entering actual energy consumption information for equipment**

Enter details related to the actual energy consumption levels for equipment that are flagged as **GAS Tracked**. The energy consumption information is recorded to track the actual energy usage levels maintained during a given time period while operating equipment using specific types of energy commodities, such as electricity, gas, etc.
To enter actual energy consumption information for equipment:

1. Open the Assets, Positions, or Systems form.
2. Select the equipment for which to add actual consumption, and then click the Actual Consumption tab. The system automatically populates Reading Date with the current date.
   
   **Note:** If you clear Reading Date, the system automatically clears Actual Usage UOM and Actual Consumption UOM.

3. Commodity—Enter the commodity to associate with the actual consumption reading. The system populates the Actual Consumption UOM from the selected Commodity and the Actual Usage UOM from the Design Usage UOM on the Design Consumption page. See "Designing energy consumption for equipment" on page 143.
   
   **Note:** When the Commodity is updated for the actual consumption reading, the system automatically updates Actual Consumption UOM, Actual Usage UOM, and Actual Consumption Rate UOM by searching for a date range on the Design Consumption page.

4. Actual Consumption—Enter the actual energy consumed.
   
   **Note:** If Utility Bill Level is not selected for the equipment on the Record View page, you must enter a value for Actual Consumption. If Utility Bill Level is selected, the system uses the actual consumption from the utility bill when generating the asset sustainability calculations.

5. Actual Usage—Enter the actual usage. This indicates the amount of time that was used to consume the value entered for Actual Consumption. The system automatically calculates the Actual Consumption Rate.

6. Load Factor—Enter the load factor for this actual consumption record, overriding the default value defined on the Design Consumption page.

7. Click Save Record.

**Understanding Energy Star**

Infor is a partner of Energy Star, a joint program between the U.S. Environmental Protection Agency (EPA) and the U.S. Department of Energy (DOE) to monitor and improve energy efficiency efforts.

Infor EAM works with the customer by sending the customer's energy consumption data to Energy Star's Portfolio Manager system (PM) via web services of the Automated Benchmarking System (ABS). The customer receives Energy Star ratings in return from PM thru the ABS.

Infor EAM helps commercial businesses monitor energy efficiency ratings through four of eight total web services through which data is exchanged with the EPA:

1. Get Pending Authorizations—Infor EAM receives ID information on the customer's facilities and meters
2. Confirm Pending Authorizations—complete mapping of the customer's Infor EAM IDs to facilities and meter IDs in PM
3. Manage Meter Information—send energy consumption data from Infor EAM to PM
4. Rating Exchange Service—retrieve Energy Star Ratings for historical 12 month periods
Setting up Energy Star

Map Portfolio Manager facilities and meters with Infor EAM facilities and meters to collect and transmit the correct energy consumption data to Portfolio Manager thru the Automated Benchmarking System (ABS). ABS will send all facility and/or meter data previously defined in PM to Infor EAM.

Next, select the Infor EAM Equipment ID or Infor EAM Meter ID for each facility or meter within that facility. Once the system matches some or all of the facilities/meters to their PM counterparts, click Confirm Pending Authorizations to initiate the web service message thru ABS to PM.

To set up Energy Star:

1. Open the Energy Star Setup form.
2. Click Get Pending Authorizations.
3. **Energy Star Customer ID**—Enter the Energy Star customer ID.
   
   **Note:** The **Energy Star Customer ID** is the same as the Portfolio Manager username used to log in to Portfolio Manager.


5. **EAM Building ID**—Enter the Infor EAM building ID that corresponds to the Energy Star building ID.
   
   **Note:** You must indicate that this facility is Utility Bill Level in the Facility Details section of the asset record.

6. **EAM Meter ID**—Enter the Infor EAM meter ID that corresponds to the Energy Star meter ID.
   
   **Note:** The meter must have been defined for this building in the Meters tab of the asset.

7. Click Submit. The system matches the records.
8. Click Confirm Pending Authorizations. The system opens the Customer Lookup popup.
9. **Energy Star Customer ID**—Enter the Energy Star customer ID.
10. Click Submit.

Viewing Energy Star ratings

The Energy Star Portfolio Manager system hosts the EPA national energy performance rating system. PM stores customer information on buildings, space utilization, and energy meters. Infor EAM utilizes web services to provide PM with energy consumption data thru the ABS. PM calculates and Energy Star Rating or value from 1-100, viewable on the Energy Star Ratings tab on the Equipment screen. The higher the value, the more efficient and less pollutant a facility is.
On this form, view Energy Star ratings and associated information on energy consumption and greenhouse gas emissions.

**Note:** Energy Star’s service level commitment states that the response may take up to 24 hours for asynchronous messages to be viewable; however, the response time from Energy Star may be considerably less.

To view Energy Star ratings:

1. Open the **Assets** form.
2. Click the **Energy Star Ratings** tab.
3. Click **Get Energy Star Ratings**.
4. **Start Date**—Select the start date for the 12 month period for which to get ratings.
5. **End Date**—Select the end date for the 12 month period for which to get ratings.
6. Click **Submit**.

**Viewing Energy Star messages**

View and purge asynchronous messages sent to the Energy Star Portfolio Manager (PM) thru the Automated Benchmarking System (ABS). View messages acknowledged by ABS with a transaction ID.

To view Energy Star messages:

1. Open the **Energy Star Message Viewer** form.
2. Select the transaction for which to view messages, and then choose one of the following options:
   - **To view messages**—Click **View Message**. The system displays the information.
   - **To purge message records**—Click **Purge Messages**. Select the time period from which to purge messages, and then click **Submit**.

**Printing the Energy Star ratings chart report**

Print the energy star ratings chart report.

To print the energy star ratings chart report:

1. Open the **Assets**, **Systems**, or **Positions** form.
2. Click the **Energy Star Ratings Chart** tab.
3. **Start Date**—Enter the starting date for which to retrieve the data.
4. **End Date**—Enter the ending date for which to retrieve the data.
5. Click **Submit**.
Understanding reliability rankings

Create reliability rankings for equipment to determine the criticality or risk a piece of equipment poses to your operation. If the machine fails, could it have safety or environmental implications, or will it result in production shutdown? Reliability rankings will help formalize the process to determine this risk based on your answers to the reliability questions you have configured.

Reliability rankings allow users to assign a Reliability Ranking Index (RRI) and Reliability Ranking Score to assess equipment risk. Users must first define criteria by which to assess the reliability risk.

Use the Decision Tree and develop the formula to calculate the Reliability Ranking Score, and use the assigned score ranges to determine which RRI should be applied.

To utilize the reliability ranking functionality, perform the following tasks:
1. Create a reliability ranking record.
2. Add levels to the decision tree structure.
3. Add answers to the decision tree.
4. Add formulas to the decision tree.
5. Add normalization values to the decision tree.
6. Order questions for the decision tree.
7. Assign ranking scores to reliability ranking index values.
8. Associate equipment to a reliability ranking.
9. Answer the reliability survey.
10. Calculate reliability ranking values.

Creating reliability rankings

To create a reliability ranking:

1. Open the Reliability Ranking form.
2. Click New Record.
3. Reliability Ranking—Enter a unique code identifying the reliability ranking, and then enter a description of the reliability ranking in the adjacent field.
4. Class—Enter the class of the reliability ranking. The system automatically populates Class Org.
5. Out of Service—Select to exclude the reliability ranking in the lookup on the Equipment page record.
6. Click Save Record. The system automatically populates Created By and Date Created.

Creating decision tree for reliability rankings

Create, view, or modify a decision tree for a reliability ranking to calculate a reliability ranking score. A decision tree is comprised of four levels which include a reliability ranking level and up to three sub-levels, answers, formulas, and normalization values.

Note: All levels must be used. Different branches in the tree may use varying numbers of levels.
To create decision tree for reliability rankings:

1. Open the **Reliability Ranking** form.
2. Select the reliability ranking for which to create a decision tree, and then click the **Decision Tree** tab.

**Adding levels**

Add levels to the decision tree to create a structure for calculating reliability rankings.

A level can be a node in the tree where a formula is executed or it can be a question. A question always means the lowest level in the tree has been reached. If the level is a question, one or more answers must be supplied for the question level. Levels that are not questions may have child levels.

To add levels:

1. On the **Decision Tree** tab, expand the tree, select the level for which to add to, and then click **Add Level**.
2. **Level**—Enter the unique code identifying the level, and then enter a description in the adjacent field.
3. **Question Level**—Select to indicate the level is a question with which an answer will be associated.
4. **Question**—Enter the question the system will ask if this level is a question level.
5. Click **Submit**.

   **Note:** To translate the selected level description and/or question, select the level, and then click **Translations** or **Question Translations**. The system opens the Translations popup. Select the language record, enter the **Translated Description**, and then select **Translated**.

**Adding answers**

Add answers to a selected question level in the decision tree to create a structure for calculating reliability rankings.

To add answers:

1. On the **Decision Tree** tab, select a question level, and then click **Add/Edit Answers**.
2. Click **Add Answer**.
3. **Answer**—Enter a unique code identifying the answer, and then enter the answer in the adjacent field.

   **Note:** Enter as many answers as necessary for a selected **Question Level**.

4. **Value**—Enter the value for the answer.

   **Note:** The system will use this value in the formula to determine the Reliability Ranking Score.

5. Click **Submit**.

   **Note:** To translate the selected answer description, select the answer, and then click **Translations**. Select the language record, enter the **Translated Description**, and then select **Translated**.
Adding formulas

Add, edit, or delete a formula for a selected non-Question level.

**Note:** The system does not allow formula associations to question levels.

To add formulas:

1. On the **Decision Tree** tab, select a non-question level for which to add a formula, and then click **Add/Edit Formula**. The system automatically populates **Level** and the level description of all the children.

2. **Formula**—Enter the formula. Use the child levels in the formula by adding a colon ":" in front of the level code. The formula also supports any SQL numeric functions.

   **Example:** Where the score for the level is determined by the average of the environmental level and 2 times the safety level:

   \[ \frac{\text{ENVIRONMENT} + 2 \times \text{SAFETY}}{2} \]

3. Click **Submit**.

   **Note:** To clear the formula, click **Clear Formula**.

Adding normalization values

Add, edit, or delete normalization values for a selected level.

You can normalize a level if the outcome for that level fluctuates between a certain range of values. However this is not the range you want to pass along to the higher level in the tree. Identify the outcome range and the normalized outcome range you want to use moving forward.

**Note:** A question level cannot be normalized.

To add normalization values:

1. On the **Decision Tree** tab, select a non-Question level, and then click **Normalize Level**.

2. Click **Add Value**.

3. **Minimum Value**—Enter the minimum value for the range.

4. **Maximum Value**—Enter the maximum value for the range.

5. **Normalized Value**—Enter the normalized value for the range.

6. Click **Submit**.

Ordering questions

Update the sequential order of questions for reliability rankings.

To order questions:

1. On the **Decision Tree** tab, click **Order Questions**. The system automatically populates **Question**, **Description**, and **Level**.
2 **Sequence Number**—Enter the number for each **Question** to define the sequential order in which the questions should appear on the reliability ranking survey.

3 Click **Submit**.

**Assigning reliability ranking index**

Assign a reliability ranking index to a range of values. The system uses the assigned value when a reliability ranking score has been calculated for equipment using the decision tree formulas.

To assign a reliability ranking index:

1 Open the **Reliability Ranking** form.
2 Select the reliability ranking for which to assign a reliability ranking index, and then click the **Ranks** tab.
3 Click **Add Reliability Rank**.
4 **Minimum Value**—Enter a minimum score for the selected index for the reliability ranking score.
5 **Maximum Value**—Enter a maximum score for selected index for the reliability ranking score.
6 **Reliability Ranking Index**—Enter the reliability ranking index. The system automatically populates the reliability ranking index description.

**Note:** Reliability Ranking Index is created on the System Codes screen. Codes for Entity=OBRI.

7 Click **Submit**.

**Viewing equipment associated to reliability rankings**

View the list of equipment associated to selected reliability rankings.

To view equipment for reliability rankings:

1 Open the **Reliability Ranking** form.
2 Select the reliability ranking for which to view associated equipment, and then click the **Equipment** tab.
3 View the equipment.

**Completing the reliability survey**

Answer the questions on the reliability survey for selected equipment to calculate the Reliability Ranking Score and the Reliability Ranking Index (RRI).

The system calculates the Reliability Ranking Score using the formula of the reliability ranking levels and the answers entered on the reliability survey. If a range has been defined for normalization, the system normalizes the output for the reliability ranking formula during the formula/calculation roll-up process.
To complete the reliability survey:

1. Open the **Assets**, **Positions**, or **Systems** form.
2. Select the asset for which to complete the reliability survey, and then click the **Reliability Survey** tab. The system automatically populates **Question** and **Value**.
   
   **Note:** Questions are based on the selected reliability ranking associated to the selected asset.

3. Select the **Question**.
4. **Answer**—Enter the answer to the selected question.
5. Click **Calculate Reliability Ranking Values** when the survey is complete. The system calculates and automatically populates **Reliability Ranking Score** and associated **Reliability Ranking Index** for the selected asset. The system also automatically populates **Reliability Ranking Values Out of Sync**, **Reliability Ranking Values Last Calculated**, **Reliability Survey Last Updated**, and **Reliability Ranking Setup Last Updated** for the selected asset.

### Updating reliability ranking values in a batch

Save selection information to calculate and assign Reliability Ranking Score and Reliability Ranking Index (RRI) values to an equipment class, category, or to selected equipment.

Once a new batch record is created for the equipment class, category, or selected equipment and reliability ranking values are calculated, the system applies the reliability ranking values to all records in the selected equipment class, category, or type.

To update reliability rankings values in a batch:

1. Open the **Batch Update Reliability Ranking Values** form.
2. Click **New Record**.
3. Enter a description for the reliability ranking batch update record.
4. **Organization**—Enter the organization of the equipment.
5. **Equipment Class**—Enter the equipment class for which to update reliability ranking values. The system automatically populates **Equipment Class Org**.
6. **Equipment Category**—Enter the category for which to update reliability ranking values.
7. **Equipment**—Enter the equipment for which to update reliability ranking values. The system automatically populates **Equipment Org**.
8. **Reliability Ranking**—Enter the reliability ranking for the equipment.
9. **Include Children**—Select to include the child equipment of the selected equipment in the reliability ranking values.
10. Click **Save Record**. The system automatically assigns a **Record ID**.
Completing the reliability survey in a batch

Answer all questions related to the reliability survey for the selected reliability ranking and equipment. Once all questions are answered, the system calculates the Reliability Ranking Score and associated Reliability Ranking Index (RRI).

To complete the reliability survey in a batch:

1. Open the Batch Update Reliability Ranking Values form.
2. Select a reliability ranking batch update record, and then click the Reliability Survey tab. The system automatically populates Sequence Number, Question, Level, the level description, and Value.
3. Answer—Select the answer to the question.
4. Click Submit.

Note: To calculate the reliability ranking value after the survey is complete, click Calculate Reliability Ranking Values. The system calculates the values and automatically populates Reliability Ranking Index, Reliability Ranking Score, Reliability Ranking Values Out of Sync, Reliability Ranking Values Last Calculated, Reliability Survey Last Updated, Reliability Ranking Setup Last Updated, Date Created, and Created By on the Record View.

Copying reliability ranking values to equipment in a batch

Copy reliability ranking values to selected equipment.

To copy reliability ranking values to selected equipment in a batch:

1. Open the Batch Update Reliability Ranking Values form.
2. Select the reliability ranking batch update record for which to copy reliability ranking values, and then click the Equipment tab.

Note: Equipment that would be selected based on the class, category, or equipment identified on the reliability ranking batch update record will not display if Lock Reliability Ranking Values is selected for that equipment.

3. Select—Select the equipment records for which to copy reliability ranking values.
4. Click Copy Reliability Ranking Values to Selected Equipment. The system updates the Equipment list and automatically populates Reliability Ranking Index, Reliability Ranking Score, Reliability Ranking Values Out of Sync, Reliability Ranking Values Last Calculated, Reliability Survey Last Updated, and Reliability Ranking Setup Last Updated.

Copying reliability rankings

Copy reliability rankings to quickly create a new reliability ranking by copying information from an existing reliability ranking to a new reliability ranking.
To copy reliability rankings:

1. Open the **Reliability Ranking** form.
2. Select a reliability ranking record for which to copy reliability rankings, and then click the **Record View** tab.
3. Right-click on the form, and then select **Copy Reliability Ranking**.
4. **New Reliability Ranking**—Enter a unique code identifying the new reliability ranking, and then enter a description of the reliability ranking in the adjacent field.
5. **Custom Field Values, Comments, Decision Tree, Documents**, and **Ranks**—Select which related details to copy to the new reliability ranking.
6. Click **Submit**.

### Printing the reliability calculations reports

Print the reliability calculations chart, hazard chart, probability density chart, or unreliability chart.

To print the reliability calculations reports:

1. Open the **Assets** or **Positions** form.
2. Click the **Reliability Calculations** tab.
3. **Type**—Enter the type of chart to generate for the report. Enter **H** for Hazard Chart, **P** for Probability Density Chart, **R** for Reliability Chart, or **U** for Unreliability Chart.
4. **Problem Code**—Enter the problem code.
5. **Failure Code**—Enter the failure code.
6. **Cause Code**—Enter the cause code.
7. **Action Code**—Enter the action code.
8. **Sequence Number**—Enter the sequence number.
9. **Start Day**—Enter the start day for which to retrieve the report data.
10. **Scale Multiplier**—Enter the scale multiplier.
11. Click **Submit**.

### Creating rooms

Create rooms that are accessible in Infor EAM and Infor HMS when the two products are integrated.

**Note:** If the rooms were created in Infor EAM you may edit the rooms on this form. However if the rooms were created in Infor HMS you cannot edit the rooms on this form. To edit the rooms access the room records on the Rooms form in Infor HMS.

To create rooms:

1. Open the **Rooms** form.
2 Click **New Record**.

3 **Property**—Enter the property to which the room belongs.

4 **Room**—Enter a room number to identify the room, and then enter a description of the room in the adjacent field. The system automatically populates **Building**, **Wing**, **Floor**, and **Exposure**.

   **Note:** Location information (**Building**, **Wing**, **Floor**, and **Exposure**) is only available when Infor EAM is integrated with Infor HMS. It is not possible to track this information in a stand-alone Infor EAM environment.

5 **Room Type**—Select the room type, e.g., **King** or **Queen**.

6 **Unit Type**—Select the unit function type of the room, e.g., **Guest Room** or **Suite**.

7 **Status**—Select the status of the room. See the following list for default status values:
   - **In Service**—Assigned when a room is in place and operating within the business organization.
   - **Withdrawn**—Assigned when a room is no longer available for use. The system automatically populates **Withdrawal Date**.

8 **Commission Date**—Select the room’s installation date, or date the room will be counted in inventory.

9 **Maximum Guest Count**—Select the maximum number of guests the room will accommodate.

10 **Phone Number**—Enter the phone number of the room.

11 **Key Number**—Enter the key number of the room.

12 **Assigned To**—Enter the person responsible for the room, this is typically housekeeping or building maintenance personnel.

13 **Out of Service**—Select to exclude the room from being displayed in lookups.

14 **Accessible**—Select if the room is accessible to persons with disabilities.

15 **Non-Smoking**—Select if the room is designated as a non-smoking room.

16 **Name**—Enter the first, middle, and last name of the guest.

   **Note:** Guest information such as **Name**, **VIP Status**, **EmailAddress**, and **Guest PhoneNumber** is only editable from Infor HMS when operating in an integrated environment with Infor EAM. This guest information cannot be manually entered when operating in standalone Infor EAM.

17 **VIP Status**—Select the guest's VIP status.

18 **EmailAddress**—Enter the email address of the guest.

19 **Guest PhoneNumber**—Enter the guest phone number.

20 **Square Footage**—Enter the square footage of the room.

21 **Number of Beds**—Enter the number of beds available in the room.

22 **Number of Baths**—Enter the number of bathrooms available in the room.

23 **Kitchen**—Select the type of kitchen the room includes. Your options are **Central**, **None**, **Shared**, or **Private**.

24 **Living Room**—Select the type of living room the room includes. Your options are **Central**, **None**, **Shared**, or **Private**.

25 **Open Bay**—Select if this room is designated as an open bay.

26 **Facility**—Enter the facility to which the room belongs. The system automatically populates **Facility Parent** when one exists in the facility structure.

27 **Cost Roll-up**—Select if the costs should roll up to the facility.
Creating facilities

Create facilities to identify and maintain buildings, floors, elevators, HVAC units, etc. for associated properties.

To create facilities:

1. Open the Facilities form.
2. Click New Record.
3. Property—Enter the property to which the facility belongs.
4. Facility—Enter a unique code identifying the facility, and then enter a description of the facility in the adjacent field.
5. Facility Parent—Enter the parent facility.
6. Type—Select the facility type.
7. Status—Select the status of the facility, e.g., In Service to designate the facility as available for use. The system automatically populates Withdrawal Date when Status is Withdrawn.
8. Year Built—Enter the year the facility was built or purchased.
9. Commission Date—Enter the date the facility was commissioned.
10. Assigned To—Enter the person responsible for maintaining the facility, typically the maintenance personnel.
11. Out of Service—Select to exclude the facility from lookups.
12. FCI Calculation—Select to calculate the Facility Condition Index (FCI) for the facility.
13. Service Life (years)—Enter the service life of the facility.
14. Facility Condition Index (FCI)—Enter the resultant FCI based on the maintenance details of the facility. Cost of Needed Repairs/Current Replacement Value=FCI
15. Cost of Needed Repairs—Enter the cost of necessary repairs. The system automatically populates the currency and selects Eligible for Energy Star Label.
16. Replacement Value—Enter the current replacement value for the equipment. The system automatically populates the currency.
17. Cost Roll-up—Select if costs should roll up to the parent facility.
18. Track Utility Bills—Select to mark the facility as having capabilities to record utility bills.
19. Track GAS—Select to set the facility as GAS (Global Asset Sustainability) Tracked.
20. Manufacturer—Enter the facility's manufacturer.
21. Serial Number—Enter the facility's serial number.
22. Model—Enter the facility's model number.
23. Lock Reliability Ranking Values—Select to lock the reliability ranking values for the facility on the Reliability Survey tab of the Equipment screen.

28 Click Save Record.
Note: If Lock Reliability Ranking Values is selected, the system will not allow the user to modify the reliability survey answers and calculate reliability ranking values for the facility. The system also prevents the selection of facility for update on the Batch Update Reliability Ranking Values form.

24 Reliability Ranking—Enter the reliability ranking code for the facility. The system automatically populates Reliability Ranking Index, Reliability Ranking Score, Reliability Ranking Values Out of Sync, Reliability Ranking Values Last Calculated, Reliability Survey Last Updated, and Reliability Ranking Setup Last Updated, after answering the reliability survey.

25 Click Save Record.

Creating vehicles
Create and maintain vehicles for hospitality properties.

To create vehicles:

1 Open the Vehicles form.
2 Click New Record.
3 Property—Enter the property to which the vehicle belongs. The system automatically populates Type.
4 Facility—Enter the location where the vehicle is stored. The system automatically populates Facility Parent.
5 Vehicle—Enter a unique code identifying the vehicle, and then enter a description of the vehicle in the adjacent field.
6 Status—Select the status of the vehicle, e.g. In Service to indicate the vehicle is in service. The system automatically populates Withdrawal Date if Status is Withdrawn.
7 Commission Date—Enter the date the vehicle was commissioned.
8 Driver—Enter the driver to assign to the vehicle.
9 Driver PhoneNumber—Enter a phone number to contact the driver.
10 Assigned To—Enter the person responsible for the vehicle, typically the maintenance personnel.
11 Vehicle Value—Enter the monetary value of the vehicle (generally, purchase price).
12 Accessible—Select if the vehicle is handicap accessible.
13 Non-Smoking—Select if the vehicle is a non-smoking vehicle.
14 Out of Service—Select to prevent the vehicle from displaying in lookups.
15 Manufacturer—Enter the manufacturer of the vehicle.
16 Serial Number—Enter the vehicle’s serial number.
17 Model—Enter the model of the vehicle.
18 Cost Roll-up—Select if costs should roll up to the vehicle’s associated facility.
19 Click Save Record.
Defining policies

Define your organization’s corporate initiatives as policies. For example, a policy can be a corporate initiative to improve energy performance.

To define policies:
1. Open the Policies form.
2. Click New Record.
3. Policy—Enter a unique code identifying the policy, and then enter a description of the policy in the adjacent field.
4. Policy Statement—Enter a policy statement that explains how your organization plans to achieve the goal. The policy statement cannot contain more than 4,000 characters.
5. Approved By—Enter the name of the person responsible for approving the policy.
6. Date Approved—Enter the date the policy was approved.
7. Out of Service—Select if the policy is currently not being used. If you select Out of Service, the policy will not display in the lookups for policies on other forms.
8. Click Save Record.

Viewing strategies for policies

View a list of strategies associated with a policy.

To view strategies for policies:
1. Open the Policies form.
2. Select the policy for which to view strategies, and then click the Strategies tab.
3. View the strategies.

Defining strategies

Strategic initiatives help organizations meet long-term goals. For example, a strategic initiative can be your organization's corporate commitment to reducing electrical consumption. Define your organization's strategic initiatives as strategies.

To define strategies:
1. Open the Strategies form.
2. Click New Record.
3. Strategy—Enter a unique code identifying the strategy, and then enter a description of the strategy in the adjacent field.
4 **Policy**—Enter the policy to associate with the strategy. A policy can be associated with multiple strategies. The system automatically populates the policy description.

5 **Strategy Statement**—Enter a strategy statement that explains how your organization plans to achieve the goal. The strategy statement cannot contain more than 4,000 characters.

6 **Approved By**—Enter the name of the person responsible for approving the strategy.

7 **Date Approved**—Enter the date the strategy was approved.

8 **Out of Service**—Select if the strategy is currently not being used. If you select **Out of Service**, the strategy will not display in the lookups for strategies on other forms.

9 Click **Save Record**.

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**Viewing objectives for strategies**

View a list of objectives associated with a strategy.

To view objectives for strategies:

1 Open the **Strategies** form.
2 Select the strategy for which to view objectives, and then click the **Objectives** tab.
3 View the objectives.

---

**Defining objectives**

Define your organization's tactical initiatives as objectives. Tactical initiatives are short-term goals that help an organization achieve its strategic, long-term goals. The expected results and when the results are expected will be specifically stated. For example, an objective can be a tactical initiative to reduce electrical consumption at a facility by a specific amount and by a particular date.

To define objectives:

1 Open the **Objectives** form.
2 Click **New Record**.
3 **Organization**—Enter the organization to which the objectives belongs.
4 **Objective**—Enter a unique code identifying the objective, and then enter a description of the objective in the adjacent field.
5 **Strategy**—Enter the strategy to associate with the objective. A strategy may be associated with multiple objectives. The system populates the strategy description.
6 **Objective Statement**—Enter an objective statement that explains how your organization plans to achieve the goal. The objective statement cannot contain more than 4,000 characters.
7 **Currency**—Enter the currency for the objective.
8 **Approved By**—Enter the name of the person responsible for approving the objective.
9 **Date Approved**—Enter the date the objective was approved.
10 Out of Service—Select if the objective is currently not being used. If you select Out of Service, the objective will not appear in the lookups for objectives on other forms.

11 Target Type—Select the target type for the objective.

12 Target Subtype—Select the target subtype. You can select target subtypes for these target types: asset performance, energy, and waste.

13 Reliability Calculations—Select the reliability calculations. If the target subtype is reliability, you can select the reliability calculations.

14 Parameters—Select the parameters. You can select parameters for these reliability calculations: Crow-AMSAA Individual Events, Crow-AMSAA Cumulative Events, Weibull Individual Events, and Weibull Cumulative Events.

15 Conversion Type—Select one of the following options:
   • EPA 2007—Select if the objective was designed to help reduce factors that contribute to environmental damage as a result of the EPA 2007 plan.
   • Defra 2009—Select if the objective was designed to help reduce factors that contribute to environmental damage as a result of the Defra 2009 plan.

16 UOM—Enter the unit of measure for the objective.

17 Category Options—Select the category option.

18 Baseline Date Range From Date and To—Enter the beginning and ending dates with which to compare the final results to determine if an improvement was made.

19 Kickoff Date—Enter the date the objective begins.

20 Goal Date—Enter the date the objective ends.

21 Baseline Amount—Enter the baseline amount before the objective is implemented.

22 Change Amount—Enter the expected change in the amount after the objective is completed. The system calculates Days, Target Amount, and Target Change %.

23 Click Save Record.

Defining energy targets for objectives

Define energy targets used to support selected objectives.

To define energy targets for objectives:

1 Open the Objectives form.
2 Select the objective for which to define an energy target, and then click the Energy Targets tab.
3 Click Add Energy Target.
4 Scope—Enter the scope for the energy target.
5 Activity—Enter the activity for the energy target.
6 Emission Source—Enter the emission source for the energy target.
7 Click Submit.
Viewing capital planning requests for objectives

View a list of capital planning requests that are associated with a specific objective. For each objective, the system displays the capital planning request which includes the financial aspects of the project.

To view capital planning requests for objectives:

1. Open the Objectives form.
2. Select the objective for which to view capital planning requests, and then click the CPRs (Plans) tab.
3. View the capital planning requests.

Defining parameters for asset inventory

Perform assets audits to compare the system physical location of the asset with the actual physical location of the asset. Define the parameters for the asset inventory on the Parameters tab which specifies counting criteria, and then perform the count manually or using a handheld device.

To define parameters for asset inventory:

1. Open the Asset Inventory form. The system automatically populates Status, Created By, and Date Created.
2. Parameter List—Select the parameter list.
3. Session ID—The session ID will be created after Create Session is clicked. Enter a description of the session in the adjacent field.
4. Asset Organization—Enter the organization to which the asset belongs.
5. Department—Enter the department to which the asset belongs.
6. Asset Class—Enter the class to which the asset belongs. The system automatically populates Class Org.
7. Asset Status—Enter the status of the asset.
8. Assigned To—Enter to whom the asset counting is assigned.
9. Physical Location Parent—Enter the physical location parent for the asset. The system automatically populates Physical Location Parent Org.
10. Physical Location Type—Select the physical location type for the asset.
11. Standard WO—Enter the standard work order.
12. Blind Inventory—Select if the Inventory Results tab should not be synched to the mobile device.
13. Allow Move WO(s)—Select to give the iPad user permission to create Move WO(s).
14. Allow Physical Location Updates—Select to give the iPad user permission to make structural changes.
15. Click Create Session. The system displays the results on the Inventory Results tab for the selected Physical Location Parent and asset children with a status of "I" if a specific status is not entered.

Note: When Create Session is clicked, the system saves and protects all fields except Session ID.
Viewing inventory results for assets

View a list of assets generated based on data entered on the Parameters tab.

To view inventory results for assets:

1. Open the Asset Inventory form.
2. Click the Inventory Results tab. The system displays the asset records generated based on the settings on the Parameters tab or the Session ID.
3. View the asset records.

Adding assets to list

Add assets that were not a part of the asset inventory session.

To add assets to list:

1. Open the Asset Inventory form.
2. Click the Inventory Results tab.
3. Click Add Asset to List.
4. Asset—Enter the asset to add to the list. The system automatically populates Description and Asset Org. Assets with a status of "I" (installed) and to which you have organization rights and department security rights will be shown.
5. Click Submit.

Updating observed physical location of assets

Update the observed physical location of an asset when it is determined that the system indicates that the asset is in a different location. The observed physical location can only be updated if the Asset Inventory Status is Unfinished.

To update the observed physical location of assets:

1. Open the Asset Inventory form.
2. Click the Inventory Results tab.
3. Select the asset record for which to update the observed physical location, and then click Update System with Observed Physical Location.

**Note:** When updating Observed Physical Location, enter Inventory Verification Date. Otherwise, they system automatically updates Inventory Verification Date to the current system date.
Creating work orders for assets

Create work orders for assets that need to be moved to a new location.

To create work orders for assets:

1. Open the Asset Inventory form.
2. Click the Inventory Results tab.
3. Select the asset record for which to create a work order, and then click Create Move WO(s). If the Observed Physical Location is not equal to the System Physical Location, the system updates the Resolution to Move WO Created <WO Number>.

   Note: When creating work orders for assets, enter Inventory Verification Date. Otherwise, the system automatically updates Inventory Verification Date to the current system date.

Approving sessions for asset inventory

Approve an existing asset inventory session.

To approve sessions for asset inventory:

1. Open the Asset Inventory form.
2. Session ID—Select the session to approve.
3. Click the Inventory Results tab.
4. Click Approve Session.

Canceling sessions for asset inventory

Cancel an existing asset inventory session if the Session ID is populated and Status is Unfinished.

To cancel sessions for asset inventory:

1. Open the Asset Inventory form.
2. Session ID—Select the session to cancel.
3. Click Cancel Session.

Adding safety data to equipment

Add safety data to equipment to inform your employees of any hazardous situation that can cause bodily harm and of the precautions to take to protect themselves from these hazards. For example, you can add a precaution to turn equipment off and remove the power cord from the power outlet before
performing repairs on electrical equipment. After adding the safety data, review and verify the record by clicking the Reviewed By icon. The review fields will be automatically populated after you review the record.

To add safety data to equipment:

1. Open the Assets, Positions, Systems, Locations, and Categories form.
2. Select the equipment for which to add safety data, and then click the Safety tab.
3. Hazard—Enter the hazard to add to the equipment. The system automatically populates Hazard Org., Hazard Type, and the hazard description.
4. Precaution—Enter the safety measure to protect your employees from the hazard. The system automatically populates Precaution Org., and the precaution description.
5. Timing—Select the timing which is used to identify when the precaution should be taken. For example, if your employee is working with fire, you can enter the timing of pre-work to alert the employee that they should wear fire-resistant clothing before beginning the task.
6. Sequence—Enter the sequence number which is used to identify the order in which your employee should be made aware of the precaution. All precautions are important regardless of the sequence number entered.
7. Apply to Children—Select this checkbox to have the safety details applied to all child records. A safety record attached to a production line will now be visible on all equipment in that production line.
8. Click Submit. The system automatically populates Created By, Date Created, Updated By, Date Updated, Reviewed By, Reviewed By Name, Date Reviewed, and Review Type.

Defining lockout/tagout details for equipment

Define the steps your employees must take to isolate equipment from its energy sources so that your employees can complete maintenance work on the equipment without suffering bodily harm or other potential dangers in the event of the unexpected startup of the equipment or the release of stored energy. For example, define the steps necessary to isolate a jammed conveyor system from its energy sources so that the work performing maintenance and clearing the jam is not injured by the unexpected startup or release of the conveyor system.

To define lockout/tagout details for equipment:

1. Open the Assets, Positions, Systems, or Locations form.
2. Select the asset, position, system, or location for which to define lockout/tagout details, and then click the LOTO tab.
3. Click Add LOTO Record.
4. Sequence—Enter the sequence in which to implement lockout/tagout procedures.
5. Isolation Type—Select the isolation type or method for isolating or disconnecting equipment (e.g., water valve) from its energy source in order that work can be performed without risk or injury.
6. Isolation Step—Select to indicate this procedure is an isolation step and not a de-isolation step.
7 **Isolation Point**—Enter the isolation point or area the equipment can be isolated from its energy sources to prevent injury from unexpected startup. The system automatically populates the description of the isolation point, **Isolation Point Org.**, **Equipment**, the description of the equipment, **Equipment Org.**, **Location**, and **Location Org.**

8 **Location Note**—Enter any additional notes on the location of the equipment as necessary.

9 **Energy Source**—Select the equipment's source of energy, e.g., electrical power.

10 **Isolation Method**—Enter the method by which to isolate the equipment from its energy source. The system automatically populates the description of the isolation method.

11 **Number of Tags**—Enter the number of tags required to properly lock and tag the equipment so that automatic startup of the equipment is prevented.

12 **Residual Energy**—Select the secondary source of residual energy to the equipment if any.

13 **Secondary Residual Energy**—Select the secondary source that stores residual energy for the equipment. This source supplies energy to the equipment when the equipment is disconnected from its primary energy and secondary energy sources.

14 **Delete Pending**—Select to delete the lockout/tagout details record during the next review.

15 **Click** **Submit**. The system automatically populates **CreatedBy** and **Date Created**.

To add or edit comments to the lockout/tagout details record, select an isolation record, and then **click** **Add/Edit Comments**. Enter or edit comments as necessary.

To add or edit documents to the lockout/tagout details record, select an isolation record, and then **click** **Add/Edit Documents**. View, associate, or edit documents to the record.

To copy lockout/tagout details from equipment, **click** **Import From Equipment**. See "Importing lockout/tagout details from equipment" on page 167.

To copy lockout/tagout details from a permit to work, **click** **Import from PTW**. See "Importing lockout/tagout details from permits to work" on page 168.

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**Importing lockout/tagout details from equipment**

When defining lockout/tagout details for equipment, you can import the details from existing equipment records.

To import lockout/tagout details from equipment:

1 **Open the** **Assets**, **Positions**, **Systems**, or **Locations** form.

2 **Select** the asset, position, system, or location for which to define lockout/tagout details, and then **click** the **LOTO** tab.

3 **Click** **Import from Equipment**.

4 **Equipment**—Enter the equipment from which to copy lockout/tagout details. The system automatically populates **Equipment Org.**

5 **Isolation Type**—Select the isolation type from which to copy lockout/tagout details. To copy all available isolation types, leave this field blank.

**Note:** If records already exist for an isolation type, the system deletes the records prior to copying the new records.
Importing lockout/tagout details from permits to work

When defining lockout/tagout details for equipment, you can import the details from existing permit to work records.

To import lockout/tagout details from permits to work:

1. Open the Assets, Positions, Systems, or Locations form.
2. Select the asset, position, system, or location for which to define lockout/tagout details, and then click the LOTO tab.
3. Click Import from PTW.
4. Permit to Work—Enter the permit to work from which to copy lockout/tagout details.
5. Isolation Type—Select the isolation type to assign to the new lockout/tagout details.
   
   **Note:** If records already exist for an isolation type, the system deletes the records prior to copying the new records.

6. Click Submit.

Viewing and modifying equipment information

Search for equipment records, and view and modify equipment information as necessary.

Viewing all equipment work orders

View the list of work orders and other events related to the equipment.

To view all equipment work orders:

1. Open the Assets, Positions, Systems, or Locations form.
2. Select the equipment for which to view equipment work orders, and then click the Events tab.
3. View the equipment work order and events information.

   **Note:** When you select a record in the grid, the system populates the associated work order number next to Event. The work order number is a hyperlink to the actual work order on the Work Orders screen.

   Double-click on a record in the grid to hyperlink to the Work Orders form. The system displays a popup with the selected work order filtered on the List View page of the Work Orders form.
For linear equipment records, the system populates From Point and To Point based on the entire length in the linear reference unit of measure of the equipment. Complete the following steps to view events for a segment or point of the linear equipment record.

4 From Point—Enter the point of the linear equipment record from which to view events.
5 To Point—Enter the point of the linear equipment record to which to view events.
6 Click Run. The system displays events that intersect at any point with the segment, e.g., the system displays a work order if its To Point intersects with the segment’s From Point or if its From Point intersects with the segment’s To Point.

Viewing equipment costs

To view equipment costs:

1 Open the Assets, Positions, Systems, or Locations form.
2 Select the asset, position, or system for which to view costs, and then click the Costs tab.
3 Click Refresh Cost Data. The system calculates the current cost information for the selected equipment and updates the Maintenance Costs list.
4 View the cost information.

Note: If the selected equipment is on the parent work order and a child work order, then the system duplicates the child work order costs by rolling the child work order costs up to the parent work order. Therefore, the system does not display the child work order costs when viewing the costs for the parent work order on the Maintenance Costs page.

Click Refresh Cost Data to see the most up-to-date cost information.

For linear equipment records, the system populates From Point and To Point based on the entire length in the linear reference unit of measure of the equipment. Complete the following steps to view costs for a segment of the linear equipment record.

5 From Point—Enter the point of the linear equipment record from which to view costs.
6 To Point—Enter the point of the linear equipment record to which to view costs.
7 Click Run. The system calculates and displays only those event costs that apply to the entered segment. When calculating segment cost, the system assumes that costs were accrued equally over the length of the work order. See the following example. WO 1657 was completed for I-85 from mile marker 5 to 10, and you want to view costs for I-85 from mile marker 5 to 6. The system displays WO 1657 in the list of equipment costs for I-85, but displays its cost as $20. The system cannot calculate segmented work order costs at a single point. See the following example.
You want to view costs for a segment of I-85. WO 1, WO 2, WO 3, WO 4, and WO 5 all fall on or within the defined From Point and To Point. Therefore, the system displays all five work orders on the Costs page. The system displays WO 3 and WO 4 because they intersect at some point with the segment’s From Point and To Point; however, the system displays their costs as $0. The system calculates and displays the segmented costs for WO 1 and WO 2. The system displays the full cost of WO 5 because its length coincides exactly with the segment’s length.

Viewing material usage

To view material usage:

1. Open the Assets, Positions, Systems, or Locations form.
2. Select the equipment for which to view material usage, and then click the Material Usage tab.
3. View the material usage information.

Viewing purchase orders for equipment

View purchase orders for equipment to review a list of all purchase order lines for parts associated with work orders for the equipment.

To view purchase orders for equipment:

1. Open the Assets, Positions, or Systems form.
2 Select the asset, system, or position for which to view purchase orders, and then click the Purchase Orders tab.

Note: By default the system displays all purchase order lines for the equipment that have not been completely received.

If a purchase order line contains a multiple equipment work order, the system also displays information about how the purchase order is split among the equipment and related work order(s).

3 View the purchase order information. See "Creating purchase order headers" on page 321 for more information about the information displayed in the Purchase Orders list.

Viewing structure details for equipment

View structure details for equipment. The structure will display assets, positions, systems, locations, component locations, and system, assembly, and component levels.

To view structure details for equipment:

1 Open the Assets, Positions, Systems, or Locations form.
2 Select the record for which to view the structure details, and then click the Structure Detail tab.
3 View the structure details.
Asset management
Materials management

The materials management module maintains materials inventory by providing an online catalog of parts, stores, manufacturers, and suppliers. You can issue and return materials, create pick tickets, perform physical inventories, manage the entire purchase order process from creating requisitions to receiving parts, and automatically generate requisitions and purchase orders based on low stock levels.

Setting up initial materials information

Set up initial materials information before using the materials management module.

Defining commodity codes

Define commodity codes to establish a method of classifying materials for purchasing and inventory. Commodity codes can identify specific types of goods, such as fiber optics, fuses, switches, etc., that can then be used to categorize specific parts in your inventory. Buyers can then associate particular suppliers with these different commodities and send out requests for quotes for the particular commodities. Storeroom and maintenance personnel can also use commodity codes to quickly access stock information.

After defining a commodity, you can update the commodity record as necessary; however, you cannot modify the Commodity or Organization for an existing commodity record.

To define commodity codes:

1. Open the Commodity form.
2. Click New Record.
3. Organization—Enter the organization to which the commodity belongs if you use multi-organization security.
4. Commodity—Enter a unique code identifying the commodity, and then enter a description of the commodity in the adjacent field.
5. Class—Enter the class of the commodity. The classes shown belong to the COMM entity. The system automatically populates Class Org.
6 **UOM**—Enter the unit of measure of the commodity.

7 **Greenhouse Gas Emission Category**—Select the greenhouse gas emission category for the commodity.

8 **Out of Service**—Select to indicate that the commodity code is no longer in use. If you select **Out of Service**, the system retains the commodity record, but it will no longer appear in the lookups for commodities on other forms.

9 Click **Save Record**.

### Defining currencies

In international markets, organizations are required to monitor the various currencies used and the different exchange rates. The system contains many predefined currencies. Define additional currencies as necessary.

**Note:** Various parts of the system rely upon currency for computing transactions. Therefore, even if you do not intend to use the system to calculate currencies for international markets, you must at least enter a base currency and attach an exchange rate of "1" to it.

To define currencies:

1 Open the **Currencies** form.
2 Click **New Record**.
3 **Currency**—Enter a unique code identifying the currency, and then enter a description of the currency in the adjacent field.
4 **Class**—Enter the class of the currency. The classes shown belong to the CURR entity. The system automatically populates **Class Org**.
5 **Out of Service**—Select to remove this currency from the currency lookups.
6 Click **Save Record**.

### Defining exchange rates for currencies

Define the exchange rate for a currency by entering a base currency and exchange rate for the currency.

**Note:** Define the base currency in the DEFCURR parameter of the **Install Parameters** form.

The system uses exchange rates to convert foreign currency amounts to base currency using the following equation:

\[
\text{base currency amount} = \frac{\text{foreign currency amount}}{\text{exchange rate}}
\]

**Example:**

Your base currency is USD. You have created a purchase order for 50 filters at 9 EUR. The price of the air filters must now be converted to USD. Assuming that the exchange rate is 1.2 EURO-USD, the system calculates the following conversion:
50 air filters @ 9 EUR = 450 EUR;
450 EUR/1.2 = 375 USD

To define exchange rate for currencies:

1 Open the Currencies form.
2 Select the currency with which to associate an exchange rate, and then click the Exchange Rates tab.
3 Click Add Exchange Rate.
4 Base Currency—Enter the base currency against which to calculate the selected foreign currency. The system automatically displays the currency associated with the organization of the current session. The system displays only those currencies associated with organizations to which you have access.
   Note: You can only define exchange rates for multiple currencies if the MULTIORG installation parameter is set to YES.
5 Exchange Rate—Enter the exchange rate for the currency.
6 Start Date—Enter the date for which the exchange rate is effective. The system automatically displays the current date.
7 End Date—Enter the date for which the exchange rate is no longer effective.
8 Click Submit.
   Note: Because exchange rates change frequently, update currency information often.

Defining lots

Define lots for materials as necessary. Manufacturers often produce items in volume batches, called lots. Lots are a numeric or alphanumeric method of indicating that an item is a member of a group of items that are produced at the same time.

Depending on the setting of the LOTNRG installation parameter, the system can automatically generate lot numbers when you receive items. Set the installation code LOTNRG to one of the following values:

T—The system generates a lot code for each receipt (Transaction).

P—The system generates a lot code for each part checked by lot. These items are designated by having Track by Lot selected on the Parts form.

Note: The SHOWLOT installation parameter determines whether lots are used for stock information for parts. The default setting for SHOWLOT is Y. If SHOWLOT is set N, the system disables Lot and it is not displayed on forms.

- (dash)—No parts are lot-controlled.

The default setting for lot numbering is P. In most cases, this is the ideal lot number method. Items requiring lot tracking receive your lot assignment; those items that do not need lot tracking are simply placed in the stock system as is. Infor EAM recommends setting the value to T for companies whose
incoming parts and supplies should be lot-tracked at all times for safety, regulatory, and quality control purposes.

The lot numbers assigned by the system are internal numbers. Cross-reference the internal numbers assigned by the system to the manufacturer’s lot numbers to track defective parts when notified by the manufacturer.

Define lot codes to identify the exact lot or batch number when stocking parts in stores.

After defining a lot, you can update the lot record as necessary; however, you cannot modify the Lot or Organization for an existing lot record.

To define lots:

1. Open the Lots form.
2. Click New Record.
3. Organization—Enter the organization to which the lot belongs if you use multi-organization security.
4. Lot—Enter a unique code identifying the lot, and then enter a description of the lot in the adjacent field.
5. Class—Enter the class of the lot. The classes shown belong to the LOT entity.
6. Expiration Date—Enter the expiration date of the lot.
7. Manufacturer Lot—Enter the manufacturer’s lot number.
8. Click Save Record.

Defining tax codes

Define tax codes to apply to materials and purchases. Tax codes represent the definition of tax coding structure that consists of a tax rate type, a tax rate code, a value for tax rate code, a tax code, and a value for the tax code.

Tax code records represent the combination of tax rate codes and tax code information that establish a structure that will apply all of the applicable taxes to materials and purchases based on transaction dates and the established tax structure created within a tax code. You can create any number of tax codes to fit any tax situation. You can also enter multiple rate codes for each tax code, as necessary.

Define tax codes by creating a tax code structure in the following order.

Step 1. Defining tax rate types

Define tax rate types to specify tax rate classifications corresponding to base tax rates, such as taxable and nontaxable. Use tax rate type codes to identify the type of tax, such as sales tax, internal tax, excise tax, or an import tax.

To define tax rate types:

1. Open the Tax Rate Types form.
2. Click New Record.
3 **Tax Rate Type**—Enter a unique code identifying the tax rate type, and then enter a description of the tax rate type in the adjacent field.

4 Click **Save Record**.

**Step 2. Defining tax rates**

Define tax rates to build the second level of tax coding. Before creating a tax rate, create tax rate types on the **Tax Rate Type** form.

Create a tax rate, such as "SC TAX" to represent a South Carolina state tax, and then associate that tax rate with a tax rate type, such as a sales or excise tax rate type. The combination of a tax rate type and a tax rate represent the definition of a tax rate code. You can also indicate whether to include the tax rate code in stock valuation.

To define tax rates:

1 Open the **Tax Rates** form.
2 Click **New Record**.
3 **Tax Rate**—Enter a unique code identifying the tax rate, and then enter a description of the tax rate in the adjacent field.
4 **Type**—Enter the type of tax rate.
5 **Include Part Taxes in Stock Value**—Select to include tax in inventory calculations of stock value.
6 **Include Service Taxes in WO Cost**—Select to include tax in service calculations of work order costs.
7 Click **Save Record**.

**Step 3. Defining values for tax rates**

Define values for tax rates to specify the tax rate percentage and the dates on which the tax period begins and ends.

To define values for tax rates:

1 Open the **Tax Rates** form.
2 Select the tax rate for which to define values and then click the **Values** tab.
3 Click **Add Value**.
4 **Start Date**—Enter the tax rate’s effective date.
5 **End Date**—Enter the tax rate’s expiration date.
6 **Percentage**—Enter the tax percentage.
7 Click **Submit**.

**Note:** To delete a value, select the value to delete, and then click **Delete Value**.
Step 4. Defining tax codes

Define tax codes to specify a code under which to group tax rates together to simplify taxing materials. Tax code records represent the combination of each of the applicable tax rates and their values. To define a tax code, enter a code and description for the tax code, and then associate all of the tax rates that are applicable for the tax code. You can create tax codes to fit any tax situation as necessary, and you can associate multiple tax rates for each tax code.

To define tax codes:
1. Open the **Tax Codes** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the tax code belongs if you use multi-organization security.
4. **Tax Code**—Enter a unique code identifying the tax, and then enter a description of the tax code in the adjacent field.
5. **Class**—Enter the class of the tax code. The classes shown belong to the TAX entity.
6. Click **Save Record**.

Step 5. Defining rates for tax codes

Define rates for tax codes to specify the tax rate(s) to include in the tax code. For example, a tax code for South Carolina might include a federal sales tax, state sales tax, and city sales tax.

The system calculates the sum of all the tax rates specified for the tax code and displays the value in **Total Tax %** on the **Record View** page of the **Tax Code** form.

To define rates for tax codes:
1. Open the **Tax Codes** form.
2. Select the tax code for which to define rates, and then click the **Rates** tab.
3. Click **Add Rate**.
4. **Rate**—Enter the rate used with this tax. The system automatically populates the rate description and **Percentage**.
5. Click **Submit**.

**Note:** Currently, taxes cannot be applied on a per piece basis. Taxes are determined as a percentage of the purchase price.

To remove a rate, select the rate to remove, and then click **Remove Rate**.
Defining reasons for return

Define reasons for return based on the most common reasons for which you must return parts. When returning parts to the supplier, the system allows you to select a reason for return. Predefined reasons for returns enable you to track return trends.

To define reasons for return:

1. Open the Reasons for Return form.
2. Click New Record.
3. Reason for Return—Enter a unique code identifying the reason for return, and then enter a description of the reason for return in the adjacent field.
4. Class—Enter the class of the reason for return. The system automatically populates Class Org.
5. Click Save Record.

Defining units of measure

Measurements for storing and issuing stock items can depend on the item itself or on the supplier. Cable, for example, is generally measured in feet. Liquids can be measured by the bottle, barrel, or gallon. Screws might be measured according to box or pound.

Measurements can vary within your own organization. Perhaps you must order widgets from a vendor in 24-item cases (the purchase unit of measure). Inventory, on the other hand, stocks widgets as single items (the inventory or stock-keeping unit of measure).

Define various measurements for different purchasing and inventory items. All system store transactions are based on inventory units of measure (how the items are actually stored). All quantities referred to on the bill of materials are also based on inventory units of measure.

When purchasing items in units of measure different from that in which you stock them, convert the unit of measurement. When the inventory unit of measure and the purchase unit of measure are exactly the same, the conversion factor is 1. If they are not the same, use the following formula:

\[
purchase \text{ UOM} \times \text{conversion} = \text{issue UOM}
\]

\[(1 \text{ box of widgets} \times 10 = 10 \text{ widgets})\]

When the buyer sends out requests for quotes to suppliers, the supplier might provide a price based on a unit of measure that is different than the purchase unit of measure (which could be true due to volume discounts, for instance). This is the quotation UOM, and you then need to supply a conversion factor between the quotation UOM and the purchase UOM when creating the purchase order or requisition.

Note: The system follows ISO recommendations and comes with many units of measure installed.

To define units of measure:

1. Open the UOM Setup form.
2. Click New Record.
3 **UOM**—Enter a unique code identifying the measurement, and then enter a description of the measurement in the adjacent field.

4 **Class**—Enter the class of the unit of measurement.

5 **SOA UOM**—Enter the Infor SOA unit of measurement for which to associate to this unit of measurement.

6 **Out of Service**—Select to prevent the UOM from being displayed in lookups.

   **Note:** You cannot delete a unit of measurement if it is being used elsewhere in the system. If you want to hide the UOM in the system lookups, select **Out of Service**. This feature is especially useful for discarding many of the predefined ISO units that you may never use.

7 Click **Save Record**.

### Defining conversion for UOM

Define the conversion factor for a selected UOM. A UOM may have multiple Conversion Factor assignments.

**From UOM = Conversion Factor * To UOM**

To define conversion for UOM:

1 Open the **UOM** form.
2 Select the UOM for which to define conversion, and then click the **Conversion** tab.
3 Click **Add Conversion Factor**. The system automatically populates **From UOM**.
4 **Conversion Factor**—Enter the conversion factor.
5 **To UOM**—Enter the UOM to which to apply the conversion factor.
6 Click **Submit**.

   **Note:** To delete a conversion factor for a UOM, select the **Conversion Factor** to delete and then click **Delete Conversion Factor**.

### Understanding time-based inventory valuation (LIFO/FIFO)

You can set up and initialize stock using the Last in first out (LIFO) and/or First in first out (FIFO) inventory valuation methods. LIFO and FIFO are both time-based price types. FIFO inventory pricing mandates that you will consume the materials purchased first before using the most recently purchased materials. LIFO pricing mandates that you will consume the most recently purchased materials before using the materials that were purchased first.
LIFO and FIFO are both storeroom price types that require you to set your pricing level on the store level. Pricing level is defined by the PRICELEV installation parameter, which must be set to S for store-level pricing.

You can set LIFO or FIFO as your pricing method for each store created on the Stores form; however, you can still modify price types for parts within a LIFO/FIFO store using a price type other than LIFO/FIFO, e.g., average price, last price, or standard price. The default price type for a store is determined by the PRICETYP installation parameter.

**Note:** You can set PRICETYP on the Install Parameters form; however, the parameter only determines the default price type that the system automatically displays for Price Type when you are creating a store on the Stores form. Modify the price type for each store as necessary.

When you create stock with any price type using the Parts form or the Equipment forms (for equipment defined with In store status), the system updates the R5BINSTOCK table with the increase in quantity, and it also creates a receipt transaction in the R5TRANSACTIONS and R5TRANSLINES tables. You can view the receipt transaction on the PO Receipts form. Because all receipt transactions require a supplier, the system automatically inserts an asterisk (*) as the supplier for the receipt, and the default description for each of these receipt transactions is ‘Stock initialization.’ If you are using LIFO/FIFO as your pricing method, the system also creates a record for all stock initialization in the R5FIFO table to ensure that it uses the appropriate price for all future issues of stock items from stores.

The R5FIFO table stores the part, price, quantity, store, and transaction date for each receipt transaction, as well as the purchase order and purchase order line for all LIFO/FIFO stock received from a purchase order. The transaction date indicates the date the stock is inserted into inventory upon which future LIFO/FIFO transactions are based. For every transaction that increases stock, the system inserts a new record in the R5FIFO table. For every transaction that decreases stock, the system locates the appropriate record(s) to update or delete based on the transaction date. For FIFO pricing, the system locates the record that was inserted into inventory first. For LIFO pricing, the system locates the record that was most recently inserted into inventory.

The system revalues the price of materials based on LIFO/FIFO pricing as transactions involving stock occur. The system displays the current price for LIFO/FIFO stock in Stock Value on the Store page of the Parts form. See the following scenarios for more information about how the system prices for different types of inventory transactions for the LIFO/FIFO pricing methods.

**Note:** FIFO pricing is used in the examples for each of the following scenarios. If you are using LIFO pricing, the system handles LIFO pricing for each example in the same manner; however, it locates the record that was inserted into inventory most recently to calculate the appropriate price, rather than locating the record that was inserted into inventory first.

**Scenario 1: Issuing parts to work orders (LIFO/FIFO)**

When issuing parts from stores to work orders using the Work orders form, and when you are using LIFO/FIFO as your pricing method, the system calculates the transaction price of issued parts using the R5FIFO table, rather than retrieving the base price from the R5PARTS or R5STOCK table.

If you have selected FIFO as your pricing method, the system locates the oldest part with the earliest insertion date in the R5FIFO table and attempts to fulfill the demanded quantity of the part on the work order. If the quantity of the first record is not sufficient to fulfill the demanded quantity of the part on the work order, the system issues the available quantity of the first record to the work order, and then locates the next record inserted into inventory in the R5FIFO table. The system continues to locate...
and issue the parts from the **R5FIFO** table, issuing the oldest parts first until the requested quantity of the part is fulfilled for the work order.

The system records the transaction price of the LIFO/FIFO issue to the work order using the price of the appropriate part inserted into the **R5FIFO** table. If the system uses more than one record from the **R5FIFO** table to fulfill the quantity of the issue, then it calculates the price of the issue using the weighted average of the price of the R5FIFO records used to fulfill the issue. However, the system inserts a record of the original issue price and quantity of the part issued in the **R5ISSUES** table to preserve a record of the original issue price of a part should the issued part need to be returned to store in the future. See the example below for more information about how the system handles LIFO/FIFO pricing for issuing parts to work orders.

**Example**

Your pricing method is FIFO. You have created a work order that creates demand for 10 air filters. Presently you have 19 air filters in stock with different insertion dates and prices. At the time of issue, the **R5FIFO** table contains the following information:

<table>
<thead>
<tr>
<th>Insertion date</th>
<th>Quantity in store</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-APR-2002</td>
<td>4</td>
<td>7 USD</td>
</tr>
<tr>
<td>7-MAY-2002</td>
<td>3</td>
<td>8 USD</td>
</tr>
<tr>
<td>10-JUN-2002</td>
<td>8</td>
<td>16 USD</td>
</tr>
<tr>
<td>25-JUN-2002</td>
<td>4</td>
<td>18 USD</td>
</tr>
</tbody>
</table>

**Note:** The Insertion date column in the table above indicates the date the stock was received into inventory.

To fulfill the requested quantity of the air filters for the work order, the system locates the 4 parts inserted into stock on 1-APR-2002 at 7 USD each, inserts a record of 4 parts at 7 USD into the **R5ISSUES** table, and then deletes the record of the 4 parts at 7 USD from the **R5FIFO** table. The system then locates the 3 parts inserted into stock on 7-MAY-2002 at 8 USD each, inserts a record of the 3 parts at 8 USD into the **R5ISSUES** table, and then deletes the original record of the 3 parts from the **R5FIFO** table. The system then locates the 8 parts inserted into stock on 10-JUN-2002 at 16 USD, inserts a record of 3 parts into the **R5ISSUES** table, and updates the quantity of the 10-JUN-2002 record to 5 in the **R5FIFO** table. The system then creates the issue to the work order and calculates the transaction price of the issue using the following equation:

\[
\frac{(4 \text{ air filters @ 7 USD}) + (3 \text{ air filters @ 8 USD}) + (3 \text{ air filters @ 16 USD})}{10} = 10 \text{ USD}
\]

After completing the issue to the work order, the **R5ISSUES** and **R5FIFO** tables contain the following information:

<table>
<thead>
<tr>
<th><strong>R5ISSUES</strong></th>
<th><strong>R5FIFO</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>4 air filters @ 7 USD</td>
<td>5 air filters @ 16 USD</td>
</tr>
<tr>
<td>3 air filters @ 8 USD</td>
<td>4 air filters @ 18 USD</td>
</tr>
<tr>
<td>3 air filters @ 16 USD</td>
<td></td>
</tr>
</tbody>
</table>
Scenario 2: Receiving parts (LIFO/FIFO)

When receiving parts into inventory using LIFO/FIFO as your pricing method, the system automatically inserts a record for the received part into the R5FIFO table upon approval of the receipt.

When creating and approving a receipt using the PO Receipts form, the system associates the stock record inserted in the R5FIFO table with the part on the appropriate purchase order line. Associating the stock record with the purchase order line in the R5FIFO table records the quantity of the part received at the purchased unit price. The purchase unit price includes tax and/or any additional charges for the part if you have set the part price to include tax and/or additional charges.

Scenario 3: Returning parts from a work order to a store (LIFO/FIFO)

When returning parts from work orders to stores using the Work orders form, and when you are using LIFO/FIFO as your pricing method, the system attempts to locate an equivalent issue in the R5ISSUES table for the same store and part from which to make the return. The system also attempts to locate the same work order and activity or equipment or project to which the part was originally issued. If the equivalent issue exists in the R5ISSUES table, the system uses the issue price as the price of the return. If the equivalent issue does not fulfill the entire return, the system returns the remaining quantity of the part using its current average price.

As the system locates issues to fulfill the return, it deletes the used issues from the R5ISSUES table and inserts a record into the R5FIFO table using the date and time of the original receipt stored in the record in the R5ISSUES table. If the system cannot fulfill the return quantity using records from the R5ISSUES table, it inserts a new record in the R5FIFO table using the current system date and time as the transaction date. If the system locates the issues to fulfill the return quantity, it deletes or reduces the quantity of the issues used for the return from the R5ISSUES table.

The system calculates the transaction price of the LIFO/FIFO return from a work order, equipment, or project to store using the weighted average of the prices of the parts used from the R5ISSUES table. If equivalent issues exist to fulfill the return quantity, the system uses the date of the original R5FIFO records stored in the ISS_FIFODATE column of the R5ISSUES table as the transaction date recorded for the record(s) inserted into the R5FIFO table for the return. If no equivalent issues exist to fulfill the return, the system uses the current date. See the example below for more information about how the system handles LIFO/FIFO pricing for returning parts from a work order to a store.

Example

Your pricing method is FIFO. You need to return 10 air filters from a work order to store. At the time of the return, the R5ISSUES and R5FIFO table contain the following information:

<table>
<thead>
<tr>
<th>R5ISSUES (for this work order)</th>
<th>R5FIFO</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 air filters @ 8 USD 4-MAY-2002</td>
<td>1 air filter @ 8 USD 7-MAY-2002</td>
</tr>
<tr>
<td>5 air filters @ 10 USD 1-APR-2002</td>
<td>2 air filters @ 7 USD 29-MAY-2002</td>
</tr>
<tr>
<td></td>
<td>2 air filters @ 9 USD 1-JUN-2002</td>
</tr>
</tbody>
</table>

Note: The date displayed in the R5ISSUES column in the table above indicates the date the stock was received into inventory, e.g., 4-MAY-2002.

To cover the return quantity, the system locates the 5 parts inserted into R5ISSUES on 1-APR-2002 at 10 USD each, returns them from the work order to store, inserts a record of 5 parts at 10 USD into
the R5FIFO table, and deletes the record of the 5 parts at 10 USD from the R5ISSUES table. The system then locates the 3 parts inserted into R5ISSUES on 4-MAY-2002 at 8 USD each, returns them from the work order to store, inserts a record of the 3 parts at 8 USD into the R5FIFO table, and deletes the original record of the 3 parts from the R5ISSUES table.

There are no equivalent issues remaining from which to fulfill the return quantity, and 2 parts are still needed to fulfill the return quantity of 10, so the system then locates the records that existed in the R5FIFO table before the return and calculates the weighted average price of the parts using the following equation:

\[
\frac{(1 \text{ air filter @ 8 USD}) + (2 \text{ air filters @ 7 USD}) + (2 \text{ air filters @ 9 USD})}{5} = 8 \text{ USD}
\]

The system returns the remaining 2 parts using the price of 8 USD and inserts a new record of 2 parts at 8 USD in the R5FIFO table.

The system calculates the transaction price of the return using the following equation:

\[
\frac{(5 \text{ air filters @ 10 USD}) + (3 \text{ air filters @ 8 USD}) + (2 \text{ air filters @ 8 USD})}{10} = 9 \text{ USD}
\]

After completing the return from work order to store, the R5ISSUES and R5FIFO tables contain the following information:

<table>
<thead>
<tr>
<th>R5ISSUES</th>
<th>R5FIFO</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 air filters @ 10 USD 1-APR-2002</td>
<td></td>
</tr>
<tr>
<td>3 air filters @ 8 USD 4-MAY-2002</td>
<td></td>
</tr>
<tr>
<td>1 air filter @ 8 USD 7-MAY-2002</td>
<td></td>
</tr>
<tr>
<td>2 air filters @ 7 USD 29-MAY-2002</td>
<td></td>
</tr>
<tr>
<td>2 air filters @ 9 USD 1-JUN-2002</td>
<td></td>
</tr>
</tbody>
</table>
| 2 air filters @ 8 USD 4-JUN-2002   | (The transaction date for this record is updated to the current system date and time.)

Scenario 4: Pricing store-to-store transactions (LIFO/FIFO)

When moving parts between stores, you can do so using the following forms: the Quick Store-to-Store Transfers form, the Store-to-Store Issues form, the Store-to-Store Requisitions form, and the Store-to-Store Receipts form. The system creates two transaction lines for the store-to-store transaction. Initially, the system creates an issue transaction in the issuing store of the parts to transfer. The system also creates a receipt transaction in the receiving store. If you are using LIFO/FIFO as your pricing method when moving parts between stores; the system also creates a record in the R5FIFO table for the receiving store; however, this issue transaction does not create a record in the R5ISSUES table for the issuing store.

To avoid creating transactions that result in a price of zero for store-to-store materials movements, you must enter a value for Price when you issue a part using the Quick Store-to-Store Transfer form.
The system automatically populates **Price** with the average LIFO/FIFO price of the part in the issuing store. You can modify **Price** as necessary. The price of the issue transaction in the issuing store is equal to the average price of the records in the **R5FIFO** table that are affected by the transfer.

If the part being transferred does not already exist in the receiving store, then the system inserts a new record of the part and the receiving store in the **R5FIFO** table priced at the value entered for **Price** on the **Quick Store-to-Store Transfer** form or on the **PO Receipts** form. The system also creates a receipt transaction for the quantity transferred and the value entered for **Price**.

**Scenario 5: Pricing returns to suppliers (LIFO/FIFO)**

When returning parts purchased on a purchase order from a store to a supplier using the **Supplier Returns** form, and when you are using LIFO/FIFO as your pricing method, the system attempts to locate a record of the same part on the original purchase order line from which to calculate the return price of the part in the **R5FIFO** table. If the system locates a record of the part on the purchase order line in the **R5FIFO** table, then the system uses the original price of the part on the purchase order line as the return price. If the return quantity cannot be completely covered by the quantity of the part located on the purchase order line in the **R5FIFO** table, the system continues to attempt to locate matching records of the part to return on purchase order line records in the **R5FIFO** table until the return quantity is completely covered.

If the system cannot locate enough matching records to fulfill the return quantity, then the outstanding quantity of the return is fulfilled using other available records of the same part in the **R5FIFO** table that are not associated with the original purchase order line for which you are returning the parts. However, the system still uses the appropriate first or last record depending on whether your price type is LIFO or FIFO. The system deletes or reduces the quantity of all the records used to fulfill the return quantity from the **R5FIFO** table.

See the example below for more information about how the system handles LIFO/FIFO pricing for pricing returns to suppliers.

**Example**

Your pricing method is FIFO. You need to return 10 air filters that were originally purchased on purchase order number 10003 at 8 USD each. At the time of the return, the **R5FIFO** table contains the following information:

<table>
<thead>
<tr>
<th>Insertion date</th>
<th>Quantity in store</th>
<th>Price</th>
<th>Purchase order number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-APR-2002</td>
<td>2</td>
<td>18 USD</td>
<td></td>
</tr>
<tr>
<td>7-MAY-2002</td>
<td>9</td>
<td>8 USD</td>
<td>10003</td>
</tr>
<tr>
<td>10-JUN-2002</td>
<td>8</td>
<td>9.50 USD</td>
<td>10004</td>
</tr>
</tbody>
</table>

**Note:** The Insertion date column in the table above indicates the date the stock was received into inventory.

The system locates the 9 parts at 8 USD from the original purchase order 10003 for the return and deletes this record from the **R5FIFO** table, because there is no remaining quantity of this part for this **R5FIFO** record.
There are no matching records of the part on a purchase order line from which to fulfill the return quantity, and 1 part is still needed to fulfill the return quantity of 10, so the system then locates the first record of 2 parts at 18 USD that were received into inventory and inserted into the R5FIFO table on 1-APR-2002. The system updates the quantity from 2 to 1 for the return. The last part is returned at the price of 18 USD.

The system calculates the price of the return using the following equation:

\[
\frac{(9 \text{ air filters @ 8 USD each}) + (1 \text{ air filter @ 18 USD each})}{10} = 9 \text{ USD}
\]

After completing the return from store to the supplier, the R5FIFO table contains the following information:

<table>
<thead>
<tr>
<th>Insertion date</th>
<th>Quantity in store</th>
<th>Price</th>
<th>Purchase order number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-APR-2002</td>
<td>1</td>
<td>18 USD</td>
<td></td>
</tr>
<tr>
<td>10-JUN-2002</td>
<td>8</td>
<td>9.50 USD</td>
<td>10004</td>
</tr>
</tbody>
</table>

**Scenario 6: Pricing internal repair receipts (LIFO/FIFO)**

The system handles pricing of internal repair receipts in much the same manner as a normal receipt from a vendor. See “Scenario 2: Receiving Parts (LIFO/FIFO)” earlier in this chapter. Repairable spares can be repaired internally and externally. The forms used to receive repairable spares and the receipt process will vary depending on whether the part is being repaired externally or internally. When creating receipts for parts repaired internally, use the Internal Repair Receipts form. When creating receipts for parts repaired externally, use the PO Receipts form. See the examples below for more information about how the system handles LIFO/FIFO pricing for parts repaired internally and externally.

**Example 1**

You are receiving a part repaired internally. The system updates the available quantity of the part in inventory by the received quantity and inserts a record of the part and the Repair Price in the R5FIFO table when the internal repair receipt is approved.

**Example 2**

You are receiving a part repaired externally. The system updates the available quantity of the part in inventory by the received quantity and inserts a record of the part and the receipt unit price in the R5FIFO table when the PO receipt is approved.

**Note:** You can view and/or edit stock value information created by transactions for all LIFO/FIFO stock on the Stock Value page of the Parts form.

**Scenario 7: Pricing positive and negative adjustments (LIFO/FIFO)**

When signing off stocktake and updating quantities using the Physical Inventory form, the system handles LIFO/FIFO pricing of negative adjustments the same way that it handles regular issues.

For positive adjustments, the system calculates the average price of the part in the store that is adjusted by the stocktake. Then the system inserts a record of the positive adjustment quantity at the calculated average price and a transaction record of the positive adjustment in the R5FIFO table.
Note: For scrapped repairable spare parts, the system does not update the price for external or internal repairs.

Creating stores

Create stores to define specific locations for storing parts. When creating stores, the system automatically populates the **Price Type** for the store with the value specified for the PRICETYP installation parameter, but you can modify the price type for each store as necessary.

You can set the store pricing method to Average price, Last price, Standard price, First in first out (FIFO), or Last in first out (LIFO). However, you can only set **Price Type** to FIFO or LIFO if the PRICELEV installation parameter is set to S.

To create stores:

1. Open the **Stores** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the store belongs if you use multi-organization security.
   
   Note: Stores cannot belong to common organizations.
4. **Store**—Enter a unique code identifying the store, and then enter a description of the store in the adjacent field.
5. **Class**—Enter the class of the store. The classes shown belong to the STOR entity.
6. **Enterprise Location**—Enter an enterprise location for the store.
   
   Note: You can only associate **Enterprise Location** to one **Store**.
7. **Price Type**—Select the price type for the store.
   
   Note: If the PRICELEV installation parameter is set to P, **Price Type** is hidden, and the system sets the price type for the store based on the setting of the PRICETYP installation parameter.
8. **Location**—Enter the store’s location within the facility.
9. **Auto. Req. Status**—Select the status code for a part requisition when quantities fall below a specified minimum. **Auto. Req. Status** determines the status that is automatically assigned to the system-generated requisitions. You may want to set **Auto. Req. Status** to automatically assign a status of **Approved** to requisitions with set reorder points and approved reorder quantities.
10. **Parent Store**—Enter the parent store.
11. **Copy Parent’s Reorder Details**—Select to copy stock management information from the parent store to the child store when creating a stock record in the child store.
   
   If you select a parent store, the system automatically populates **Minimum Level**, **Reorder Level**, **Order Quantity**, and **Preferred Supplier** or **Preferred Store** for the new stock record with the values from the stock record of the parent store.
   
   Note: **Copy Parent’s Reorder Details** is enabled only if you have selected a value for **Parent Store**. Additionally, a stock record must already exist for the store selected as the parent store from
which to copy the parent reorder details, and the DEFSTOCK installation parameter must be set to YES.

**12 Out of Service**—Select to indicate that the store is no longer in use. If you select Out of Service, the system retains the store record, but it will no longer appear in the lookups for stores on other forms. However, you can continue to modify information on the store record as necessary.

**Note:** Selecting Out of Service will not affect any unfinished transactions for the store, such as requisitions, purchase orders, purchase order receipts, part issues and returns, etc.

**13 Parts Tax Code**—Enter the tax code for the part used on the Parts tab of the PO line.

**14 Services Tax Code**—Enter the tax code for the service used on the Services tab of the PO line.

**15 Sun., Mon., Tues., Wed., Thurs., Fri., and Sat.**—Select to indicate the working days for the store that are to be included when the system is counting the number of days for which to generate demand-based requisitions based on the Reserved Parts Buffer (Days). For example, if you select Mon., Tues., Wed., Thurs., and Fri. as the working days for the store, then the system will only count those days, and Saturdays and Sundays will be excluded from the count. If the Reserved Parts Buffer (Days) is set to 60 and you select Mon., Tues., Wed., Thurs., and Fri. as the working days for the store, the system will actually be including part-demand on generated requisitions for a period that is longer than 60 days in actuality but only 60 days in terms of the selected working days for the store.

**16 Lead Time (Days)**—Enter the number of days needed internally for inventory deliveries or transfers at the store. Lead Time (Days) is only used for store-to-store requisitions.

**Note:** If you also define or have defined Lead Time (Days) on the Stores page of the Parts form, that value overrides the value entered here on the Record View page of the Stores form.

**17 Internal Lead Time (Days)**—Enter the number of days needed internally for inventory deliveries or transfers at the store. Internal Lead Time (Days) is used for store-to-store requisitions that have automatically generated from a batch report.

Specifying an Internal Lead Time (Days) enables you to factor in an additional lead time required for approvals or processing that must be considered when calculating the time needed to receive inventory. The value specified for Internal Lead Time (Days) will be considered in conjunction with the Lead Time (Days) specified for the supplier on the Record View page of the Suppliers form.

If you know that you require three days for a purchase order to be approved internally for this store, you can enter 3 as the value for Internal Lead Time (Days) to accommodate the lead time when generating demand-based requisitions for this store.

**18 Reserved Parts Buffer (Days)**—Enter the maximum number of days for the system to consider when generating requisitions for reserved parts. Reserved Parts Buffer (Days) is only used for automatic requisition generation.

For example, if you specify 60 as the value for Reserved Parts Buffer (Days), then the system will only include parts for which there is demand within 60 days of the date on which the requisitions are generated.

To further illustrate the function of the Reserved Parts Buffer (Days): A scheduler within your organization creates and releases a preventive maintenance work order on which there are part reservations that create demand for the parts on the work order. However, because the due date for the work order is six months from the date on which you are generating requisitions, the demand for the parts will also be six months. Therefore, since the Reserved Parts Buffer (Days) is set to 60, the system will not consider the part demand created by the released preventive maintenance work order when generating requisitions even though the released work order has already created
demand for the parts required for the work order, because the demand for the parts on the work order extends beyond the specified buffer of 60 days.

19 **Label Printer**—Enter the default printer for printing barcoding labels.

20 **Label Template (Issue)**—Enter the default label template for printing barcoding labels for issues.

21 **Label Template (Receipt)**—Enter the default label template for printing barcoding labels for purchase order receipts.

22 **Label Template (Non-PO Receipt)**—Enter the default label template for printing barcoding labels for non-purchase order receipts.

23 **Label Server**—Enter the server for printing barcoding labels.

24 Click **Save Record**.

**Creating bins for stores**

Create bins for stores to identify specific locations where parts can be stored. Bins are useful for locating and issuing parts and for supporting physical inventory counts of part holdings.

To create bins for stores:

1. Open the **Stores** form.
2. Select the store for which to create bins, and then click the **Bins** tab.
3. Click **Add Bin**.
4. **Bin**—Enter a unique code identifying the bin.
5. **Description**—Enter a description of the bin.
6. **Out of Service**—Select to indicate that the bin is no longer in use.

   **Note:** You can only select **Out of Service** if there is no quantity of a part/parts on hand in the bin.

7. Click **Submit**.

   **Note:** To delete a bin, select the bin to delete, and then click **Delete Bin**. You can only delete a bin if there are no existing part records associated with the bin.

**Viewing part reservations for stores**

View part reservations for parts in store that are reserved or allocated.

To view part reservations for stores:

1. Open the **Stores** form.
2. Select the store for which to view part reservations, and then click the **Reservations** tab.
3. View the reservations for the part in the selected store.
Creating and managing parts information

Creating and managing parts information for a business has far-reaching effects. Once you include this information in the database, it is used time and time again by buyers, storeroom employees, planners, managers, and other individuals throughout the organization.

One of the primary considerations associated with creating and managing parts information is choosing and establishing your pricing method for parts. The system enables you to set up and initialize stock using different price types and pricing methods. Average price reflects a calculated average of part prices throughout the life cycle of the part. Last price is the last price paid for a part in purchasing. Standard price is a periodically adjusted fixed price that is usually taken from the supplier’s catalog. You can enter the initial prices; however, the system readjusts these prices as the part begins to record transactions. Base price is the default price used for purchasing if the part is not listed in the supplier’s catalog. It is also the price used for work orders, stock issues, and direct purchases that involve the part. Base price is always average price, last price, or standard price depending on the value set for the price type.

The system also enables you to set up and initialize stock using the Last in first out (LIFO) and/or First in first out (FIFO) inventory valuation methods. LIFO and FIFO are both time-based price types. FIFO inventory pricing mandates that you consume the materials purchased first before using the most recently purchased materials. LIFO pricing mandates that you consume the most recently purchased materials before using the materials that were purchased first. Class codes, categories, units of measure, suppliers, and other information must be defined before adding parts information to the database.

Creating parts

Create parts to identify parts, assets, and tools that can be entered into inventory. When creating parts, you can classify and categorize parts; identify serialized parts; and specify tax codes, warranty information, tracking methods, buyers, and preferred suppliers to facilitate the requisition and purchasing process. You can also designate parts as core tracked parts. Core tracked parts are issued and returned like regular parts; however, a core tracked part can also be repaired or reconditioned like a piece of equipment. When a part is flagged as core tracked, you can set up repair details on the Parts form to indicate how the part is to be repaired. Core tracked parts can be repaired internally on work orders or externally on purchase orders.

The pricing level of a part is set at either the part level or the stock level, but the prices are always set on the Part form. Price level determination is defined by the PRICELEV installation parameter. If the PRICELEV installation parameter is set to P, then define prices on the part level. If PRICELEV is set to S, then define prices on the store level.

If PRICELEV is set to P and you are not using multi-organization security (MOS), you can set prices on the Record View page of the Part form. If you have set the PRICELEV installation parameter to P and you are using MOS, you must set prices on the Prices page of the Part form.

If the PRICELEV is set to S, you must set prices on the Stores page of the Part form regardless of whether you are using MOS.

If you are using FIFO or LIFO as your pricing method, PRICELEV must be set to S. For LIFO/FIFO pricing, the system creates a receipt transaction that automatically updates and inserts records into
the R5BINSTOCK and R5FIFO tables when you receive a part to store to ensure that the appropriate unit price is used for each subsequent issue transaction. Because receipt transactions require a supplier, the system automatically inserts an asterisk (*) as the supplier for the receipt. See "Understanding time-based inventory valuation (LIFO/FIFO)" on page 180.

The PRICETYP installation parameter is a fixed parameter that determines the default price type that the system uses to process storeroom transactions for parts. The default value for PRICETYP is A (Average price); however, the system administrator can set PRICETYP to S (Standard price), L (Last price), LIFO (Last in first out price), or FIFO (First in first out price) depending on the setting of the PRICELEV installation parameter.

To create parts:

1. Open the Parts form.
2. Click New Record.
3. Organization—Enter the organization to which the work order belongs if you use multi-organization security.
4. Part—Enter a unique code identifying the part, and then enter a description of the part in the adjacent field. The system automatically populates Primary Manufacturer and Primary Manufacturer Part Number if the selected part has a record with Primary selected on the Manufacturers page.
   
   Note: If the AUTOPNUM installation parameter is set to YES, the system automatically assigns a part number after you save the record if no Part code is entered. If you need to change the Part number, click Change Part Number.
5. Class—Enter the class of the part. The classes shown belong to the PART entity.
6. Category—Enter the category.
7. Tool—Enter a tool for the part to identify the part as a tool. Identifying a part with a Tool enables you to issue and return tools and track tool usage for the part. Tools are defined on the Tools form.
   
   Note: If Track by Asset is selected for the part, then the tool is also equipment. If Track by Asset is not selected, then the tool is only considered a part.
8. UOM—Enter the part’s unit of measure.
9. Commodity—Enter the commodity if the part is considered a commodity. Entering a commodity code for a part enables you to segregate parts into broad groups for purchasing and inventory, e.g., wiring, office supplies, and safety equipment.
10. Secondary Commodity—Enter the secondary commodity if the part is considered a commodity within more than one commodity group. Entering a secondary commodity code for a part enables you to further segregate parts into multiple groups for purchasing and inventory, e.g., wiring, office supplies, and safety equipment.
11. Track by Asset—Select to track parts by asset number or serial number. Tracking parts by asset indicates that parts are pieces of equipment.
   
   Note: If you select Track by Asset, you must first receive the part and then enter a unique serial number for each part upon receiving the part.
12. Track by Lot—Select to track parts by lot number. If you select a Lot, then a lot number will be required for all material transactions involving the part.
13 **Track as Kit**—Select to track the part as a kit part. **Track as Kit** must be selected to include the part on a kit template.

14 **Calibration Standard**—Select to indicate the part is used as a standard for calibration.

15 **Track Cores**—Select this checkbox if the part is a core tracked part. Core tracked parts can be repaired internally on work orders or externally on purchase orders.

   **Note:** If **Track Cores** is selected, **Track as Kit** and **Fugitive Gas** cannot also be selected.

16 **Out of Service**—Select if you do not want the part to appear in the parts lookup elsewhere in the system.

17 **Tax Code**—Enter the tax to apply to the part. The values in this lookup come from a previously defined tax structure.

18 **Insp. Method**—Enter the inspection method for the part.

19 **Insp. Required**—Select to indicate that an inspection is required for the part when it is received on the **PO Receipts** form

20 **System Level**—Enter the VMRS code identifying the system level for the part.

21 **Assembly Level**—Enter the VMRS code identifying the assembly level for the part.

   **Note:** You cannot enter an **Assembly Level** unless you entered a **System Level**.

22 **Component Level**—Enter the VMRS code identifying the component level for the part.

   **Note:** You cannot enter a **Component Level** unless you entered an **Assembly Level**.

23 **Tracking Method**—Select one of the following options:
   - **Stock**—Use stocked, quantity tracked, and amount tracked for normal, stocked parts.
   - **Expense**—Use stocked, quantity tracked, and amount not tracked for devalued spare parts. These parts are issued at no cost.
   - **Non-stock**—Use non-stock, not tracked, expedited ordering for expediting the parts procurement process.

24 **Warranty Days**—Enter the number of days the part is under warranty.

25 **Save History**—Select to capture historical inventory valuation data for the part in the parts daily snapshot (PDS).

26 **Prevent Reorders**—Select to prevent this part from being reordered.

27 **Fugitive Gas**—Select to track gas emissions for the part.

28 **Part Hierarchy**—Enter the part code hierarchy level to attach to the part.

29 **Profile Name**—Enter the profile to attach to the part.

30 **Department**—Enter the department to attach to the part.

31 **Equipment Class**—Enter the equipment class to attach to the part.

32 **Manufacturer**—Enter the manufacturer of the part.

33 **Model**—Enter the model of the part.

34 **Revision**—Enter the revision number for the part.

35 **Variable 1** through **Variable 6**—Enter any additional information about the part as necessary.

36 **Buyer**—Enter the part’s buyer. Buyer assigns a particular person to buying functions for the part.
37 Preferred Supplier—Enter the part’s primary supplier if the system automatically generates requisitions for this part. The system automatically populates Supplier Price, Supplier UOM, and Qty. per UOP if they have been added to the supplier’s catalog. If you enter a Preferred Supplier with no catalog records, the system automatically creates a record of the part in the supplier’s catalog. You can update part details for the supplier on the Suppliers page.

Note: If the MULTIORG installation parameter is set to YES, part pricing is organization specific, and Price Type, Average Price, Last Price, Standard Price, and Core Value are read-only.

If the PRICELEV installation parameter is set to S, part prices are recorded at the stock level on the Stores page of the Parts form, and Price Type, Core Value, Average Price, Standard Price, and Last Price are read-only. Part pricing at the stock level enables you to maintain different prices for the same part in different stores.

If the PRICELEV installation parameter is set to P, part prices are recorded at the part level. Complete steps 32-36.

38 Price Type—Select the price type for the part. The system automatically populates Price Type depending on the setting of the PRICETYP installation parameter.

Note: If PRICETYP is set to LIFO or FIFO, the system does not display Last in First Out or First in First Out as a price type because LIFO/FIFO is not available for part pricing when prices are set at the part level. You must select Average price, Last price, or Standard price as the price type for the part.

39 Core Value—Enter the value of the part when it needs repair.

40 Average Price—Enter the average price paid for the part if prices are based on the average price paid.

41 Standard Price—Enter the standard price for the part if prices are based on standard price.

42 Last Price—Enter the last price paid for the part if prices are based on last price paid.

43 Track by Condition—Select this checkbox if the part should be tracked by condition. If Track by Condition is not selected when the part is created, you cannot select the checkbox after the part has been created.

Note: When creating parts, you cannot select Track as Kit or Fugitive Gas if Track by Condition is selected. However, it is possible to build a kit then add the parts that you have designated as track by condition to the kit template.

44 Part Condition Template—Enter the part condition template for the part. The system automatically populates Part Condition Template Org..

45 Click Save Record. If a review has been performed on the Safety tab, the system automatically populates Safety Date Review Required and Safety Reviewed By.

Defining multiple prices of parts (MOS)

With multi-organization security (MOS), centrally maintain prices of parts used across organizations. Often companies have multiple organizations with different currencies for each organization.
When you are using MOS, you can enter multiple prices for a part that belongs to a common organization. However, you can only enter one price for a part that belongs to a specific organization.

If PRICELEV is set to P and MULTIORG is set to NO, then set prices on the Record View page of the Parts form. If PRICELEV is set to S, set prices on the Stores page of the Parts form regardless of the setting of the MULTIORG parameter. The PRICELEV installation parameter is fixed.

To define multiple prices of parts (MOS):

1. Open the Parts form.
2. Select the part for which to define prices, and then click the Prices tab.
3. Click Add Price.
4. **Organization**—Enter the organization to which the part price belongs.
   
   **Note:** The system only displays organizations to which you have access. If the part belongs to a common organization, the system displays all valid specific organizations for the logged in user. If the part belongs to a specific organization, the system displays only that organization.

5. **Price Type**—Select the price type for the part.
6. **Condition**—Enter the condition if the part is a condition tracked parent part. The system automatically populates Part and Part Org. If the part is a condition tracked child part, the system automatically populates Condition, Part, and Part Org.
7. **Core Value**—Enter the value of the part when it needs repair.
8. **Average Price**—Enter the average price of the part if prices are based on average price.
9. **Standard Price**—Enter the standard price of the part if prices are based on standard price.
10. **Last Price**—Enter the last price paid for the part if prices are based on last price paid. The system automatically populates the currency in the field adjacent to Average Price, Last Price, and Standard Price with the currency of the part’s organization.
11. Click Submit.

   **Note:** To delete a price, select the price to delete, and then click Delete Price.

To modify the part number, click Change Part Number on the Record View page.

**Associating manufacturers with parts**

Associate manufacturers with parts. You can have multiple manufacturers for a part within an organization.

You must define manufacturers on the Manufacturers form before associating them with parts.

To associate manufacturers with parts:

1. Open the Parts form.
2. Select the part for which to associate manufacturer information, and then click the Manufacturers tab.
3. Click Add Manufacturer.
4 **Manufacturer**—Enter the manufacturer for the part. The system automatically populates **Manufacturer Org**.

5 **Manufacturer Part Number**—Enter the manufacturer’s part number for the part.

6 **Condition**—Enter the condition if the part is a condition tracked parent part. The system automatically populates **Part** and **Part Org**. If the part is a condition tracked child part, the system automatically populates **Condition**, **Part**, and **Part Org**.

7 **Drawing Number**—Enter the drawing number if a drawing of the part is available.

8 **Out of Service**—Select if you do not want the system to display the manufacturer part number in the manufacturer part number lookups.

9 **Primary**—Select to indicate that the manufacturer is the primary manufacturer of the part.

10 Click **Submit**.

**Note:** To delete a manufacturer, select the manufacturer to delete, and then click **Delete Manufacturer**. The system does not delete the record if the manufacturer and the manufacturer part number are selected on the **Stores** page of the **Parts** form as the **Primary Manufacturer** or **Primary Manufacturer Part Number**.

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**Associating suppliers with parts**

Associate suppliers with parts. You can have multiple suppliers for a part within an organization. Additionally, suppliers may also have different methods for distributing parts, such as their own unique units of measure. If a supplier’s unit of measure for selling a part is different than the unit of measure of the part in inventory, you must establish the conversion factor for the part to create the appropriate unit of measure for an issue. You can also identify the supplier’s catalog number for the part, supplier’s part description, as well as other information pertaining to supplier’s price, currency, and minimum order quantity.

The reference between suppliers and parts is created automatically when generating purchase orders. The system verifies the supplier and notifies you if a supplier is not recorded for a specific part. You may still proceed with a transaction after such a warning. If you do proceed, the system automatically creates a new reference for the part with the supplier.

You must define suppliers on the **Business Partners** form before associating them with parts.

To associate suppliers with parts:

1 Open the **Parts** form.

2 Select the part for which to define supplier information, and then click the **Suppliers** tab.

3 Click **Add Supplier**.

4 **Supplier**—Enter the supplier for the part. The system automatically populates **Supplier Org**, and **Tax Code**.

5 **Supplier Part Desc.**—Enter the supplier’s description of the part.

6 **Condition**—Enter the condition if the part is a condition tracked parent part. The system automatically populates **Part** and **Part Org**, of the part associated to the selected **Condition**. If the part is a condition tracked child part, the system automatically populates **Condition**, **Part**, and **Part Org**.
Materials management

7 **Catalog Reference**—Enter the supplier’s part number. It may be identical to the existing part number.
8 **Cost Code**—Enter the cost code with which to associate the cost of the part.
9 **Gross Price**—Enter the supplier’s price for the part without discounts or additional fees.
10 **Repair Price**—Enter the supplier’s repair price for the part if the part is core tracked.
   
   **Note:** *Repair Price* is only enabled if the *Part* for which you are entering a supplier record is core tracked.
   
   If you entered an *Internal Repair Price* for a part on the Repair Details page of the *Parts* form, the system retrieves the *Repair Price* from the repair details for the part. If you did not specify an *Internal Repair Price*, the system retrieves the *Base Price* of the part for the *Repair Price*.

11 **Preferred**—Select to indicate that the supplier is the preferred supplier of the part.
12 **Minimum Order Qty.**—Enter the supplier’s minimum order quantity for the part.
13 **UOP**—Select the supplier’s unit of purchase for the part.
14 **Qty. per UOP**—Enter the conversion factor if the purchase unit of measure is different from the inventory unit of measure.
15 **Lead Time (Days)**—Enter the average number of days that the supplier needs to provide the ordered goods.
16 **Repair Part Number**—Enter the supplier’s repair part number for the part if the part is core tracked.
   
   **Note:** *Repair Part Number* is only enabled if the *Part* for which you are entering a supplier record is core tracked.

17 **Expiration Date**—Enter the expiration date for the part and supplier. This is just a “catalog” date, and the date entered indicates the date on which the supplier’s catalog information for the part should be replaced with a new catalog entry (new price, number, etc.).
18 **Tax Code**—Enter the tax code for the supplier.
19 **Click Submit.** The system automatically populates **Net Price**.
   
   **Note:** The system calculates the **Net Price** by adjusting the **Gross Price** for any discounts or additional fees for the part.
   
The system inserts the current date in **Date Last Updated** and calculates **Local Price** based on the currency of your organization with the following equation:
   
   (Gross Price / Exchange Rate) / Qty. per UOP = Local Price
   
   To delete a supplier, select the supplier to delete, and then click **Delete Supplier**.
   
   To add iProcure item association, click **Add iProcure Item Association**.
   
   To update iProcure items in the parts catalog, click **Update iProcure Items**.
   
   To update selected iProcure items in the parts catalog, click **Update Selected iProcure Items**.
   
   To view iProcure sync errors, click **View iProcure Sync Errors**. View the errors, and then click **Close**.
Associating alternate supplier catalog references for parts

Alternate supplier catalog references allow customers to keep a record of past catalog reference numbers for a specific part.

To associate alternate supplier catalog references for parts:

1. Open the Parts form.
2. Select the part for which to create an alternate catalog reference of parts, and then click the Suppliers tab.
3. Click Alternate Catalog of References.
4. Click Add Catalog Reference.
5. Catalog Reference—Enter the supplier catalog reference to which to associate to the part.
6. Notes—Enter notes for the catalog reference as necessary.
7. Click Submit.

Note: To delete an alternate catalog reference, select the alternate catalog reference to delete, and then click Delete Catalog Reference.

Adding safety data to parts

Add safety data to parts to inform your employees of any hazardous situation that can cause bodily harm and of the precautions to take to protect themselves from these hazards. For example, you can add a precaution to wear a safety harness when you identify a working at heights hazard. After adding the safety data, review and verify the record by clicking the Reviewed By icon. The review fields will be automatically populated after you review the record.

To add safety data to parts:

1. Open the Parts form.
2. Select the part for which to add safety data, and then click the Safety tab.
3. Hazard—Enter the hazard to add to the part. The system automatically populates Hazard Org., Hazard Type, and the hazard description.
4. Precaution—Enter the safety measure to protect your employees from the hazard. The system automatically populates Precaution Org. and the precaution description.
5. Timing—Select the timing which is used to identify when the precaution should be taken. For example, if your employee is working with fire, you can enter the timing of pre-work to alert the employee that they should wear fire-resistant clothing before beginning the task.
6. Sequence—Enter the sequence number which is used to identify the order in which your employee should be made aware of the precaution. All precautions are important regardless of the sequence number entered.
7. Health Hazard—Enter the health hazard for the part.
8. Flammability—Enter the flammability safety measure for the part.
9. Instability—Enter the instability safety measure for the part.
10 Special Hazards—Enter the special hazards for the part.

11 Click Submit. The system automatically populates Created By, Date Created, Updated By, Date Updated, Reviewed By, Reviewed by Name, Date Reviewed, and Review Type.

Creating repair details for core tracked parts

Create repair details for core tracked parts to enter detailed information about repairing or reconditioning a part. The repair details for a core tracked part specify whether a part is to be repaired internally or externally, and they include additional information used to generate repair work orders or external repair requisition lines.

Understanding the auto-assignment processes for core tracked parts

The assignment process for a core tracked part denotes a bin location from which the system is to take a part for repair, not a location in which to place a part for repair. The system can either automatically assign repair details or you can manually assign repair details. The manner in which the system auto-assigns core tracked parts will vary depending on the Auto-Assign setting and quantities available for repair in bin locations.

If you enter a Store and set up a Default Core Bin, the system assigns the Qty. to Repair from the Default Core Bin (from which the Bin, Lot, and Asset are specified for the repair parts), and updates the Qty. Assigned. The system updates the Repair Details page of the Parts form and moves the Core Qty. to the Qty. at Shop. If the system cannot find enough parts for repair in the Default Core Bin or if no parts are located in the Default Core Bin or if you do not select a Default Core Bin on the Repair Details page of the Parts form, the system assigns details from other bin locations.

Creating repair details for core tracked parts to be repaired internally

Create repair details for core tracked parts to be repaired internally on Repairable Spare Type work orders. If you select to generate work orders for repairable cores on the Generate/Release WOs form, the system checks to see if there is a Core Qty. specified for any parts in inventory for which you have entered repair details. If so, the system generates a work order for the repairable core part based on the specified repair details for the part.

The system updates the stock record for the part in the selected store with the repair details.

To create repair details for core tracked parts to be repaired internally:

1 Open the Parts form.
2 Select the part for which to create repair details, and then click the Repair Details tab.
3 Select the store for which to create repair details for this core tracked part.
4 Internal Repair—Select to repair the part internally.

Note: If you select External Repair after saving the repair details as an Internal Repair, the system displays a confirmation message asking whether you wish to continue. If you select to continue, the
system clears **WO Equipment**, **Department**, and **Standard WO**. The system enables **Supplier**, **Lead Time (Days)**, and **Min. Repair Qty**.

5 **WO Equipment**—Enter the work order equipment for the core tracked part.

6 **Department**—Enter the department for the repair work order.

   **Note:** If you enter a value for **WO Equipment**, the system automatically populates **Department**. Modify **Department** as necessary.

7 **Standard WO**—Enter the standard work order for repairing the part.

8 **Internal Repair Price**—Enter the cost of repairing the part internally. The system automatically populates **Core Value** with the value entered on the **Stores** tab.

9 **Default Core Bin**—Enter the default core bin to which to return the broken core tracked part. If you specify a **Default Core Bin**, the system automatically returns the broken core tracked part to the specified bin location when you return it for repair from any form on which you can return a part for repair.

   **Note:** Infor strongly recommends using the **Default Core Bin** feature to reduce the number of manual steps required to manage your core tracked data. Specifying a **Default Core Bin** in the repair details eliminates the need to manually enter a bin location for returning the broken part when you actually return the part for repair.

10 **Use Stock Method**—Select to generate the quantity to repair based on the default stock method specified for the part in the store. If you select **Use Stock Method**, the system calculates the **Qty. to Repair** based on the stock replenishment method specified for the part in the holding store. For example, you selected Min/Max as the stock method for the part and you specified 5 as the **Minimum Qty.** and 10 as the **Maximum Qty.** for the part. The current **Quantity** of the part on hand is 4 and the **Core Qty.** is 9. When you generate an internal repair work order for the part, the system calculates the **Core Qty.** as 6 parts rather than 9 to update the **Qty. on Hand** of the part in stock to the specified maximum of 10.

   The **Core Qty.** represents the total number of core parts that are currently in a store. The system calculates the **Qty. to Repair**, which is the total number of parts that must be repaired and can be less than the **Core Qty.** depending on the current stock/repair levels for the part.

11 **Auto-Assign**—Select to indicate that the system automatically assign parts for repair from the specified **Default Core Bin** when generating a repairable core work order or requisition. If you select **Auto-Assign**, the system attempts to assign the number of parts in **Qty. to Repair** from the specified **Default Core Bin** when generating repair work orders or requisitions. If there are parts to be repaired in the **Default Core Bin**, the system automatically assigns the parts from the bin location to the work order or requisition first. When the system assigns all of the parts for repair located in the **Default Core Bin** or if no parts are located in that bin, the system then checks other bin locations for the parts to assign to the work order or requisition.

   **Note:** The assignment process for a core tracked part denotes a bin location from which a part is to be taken for repair, not a location in which to place a part for repair.

12 **Click Submit**.

   **Note:** If you are using LIFO/FIFO as your pricing method and the RPPRCCAL installation parameter is set to NO, the system protects the internal repair price and records the base price of the part in the **R5FIFO** table.
Creating repair details for core tracked parts to be repaired externally

Create repair details for core tracked parts to be repaired externally. External repairs are initiated using external repair requisitions submitted to a supplier who will repair the part. If you select to generate external repair requisitions on the Generate Requisitions form, the system checks to see if there is a Core Qty. specified for any parts in inventory for which you have entered repair details. If so, the system generates a requisition for the core tracked part based on the specified repair details for the part.

The system updates the stock record for the part in the selected store with the repair details.

To create repair details for core tracked parts to be repaired externally:

1. Open the Parts form.
2. Select the part for which to create repair details, and then click the Repair Details tab.
3. Select the store for which to create repair details for this core tracked part.
4. External Repair—Select to send the part to an external supplier for repair.
   
   Note: If you select Internal Repair after saving the repair details as an External Repair, the system displays a confirmation message asking whether you wish to continue. If you select to continue, the system clears Preferred Supplier, Lead Time (Days), and Min. Repair Qty. The system enables WO Equipment, Department, and Standard WO.

   The system automatically populates Core Value with the value entered on the Stores tab.

5. Default Core Bin—Enter the default core bin to which to return the broken core tracked part.
   
   If you specify a Default Core Bin, the system automatically returns the broken core tracked part to the specified bin location when you return a broken core tracked part from any form from which you can return a part for repair.
   
   Note: Infor strongly recommends using the Default Core Bin feature to reduce the number of manual steps required to manage your core tracked data. Specifying a Default Core Bin in the repair details eliminates the need to manually enter a bin location for returning the broken core tracked part when you actually issue/return the part for repair.

6. Preferred Supplier—Enter the preferred supplier for which to generate the requisition for repair.

7. Lead Time (Days)—Enter the lead time for the core tracked part in days. The specified lead time is added to the date requested (system date) to determine the amount of additional lead time necessary for processing the repair.

8. Min. Repair Qty.—Enter the minimum quantity for repair that will trigger the generation of a requisition for the core tracked part.

9. Auto-Assign—Select to indicate that the system automatically assign parts for repair from the specified Default Core Bin when generating a repairable cores work order or requisition.
   
   If you select Auto-Assign, the system attempts to assign the number of parts in Qty. to Repair from the specified Default Core Bin when generating repair work orders or requisitions. If there are parts to be repaired in the Default Core Bin, the system automatically assigns the parts from the bin location to the work order or requisition first. When the system assigns all of the parts for repair located in the Default Core Bin or if no parts are located in that bin, the system then checks other bin locations for the parts to assign to the work order or requisition.
**Note:** The assignment process for a core tracked part denotes a bin location from which a part is to be taken for repair, not a location in which to place a part for repair.

10 Click **Submit**.

**Note:** If you are using LIFO/FIFO as your pricing method and the RPPRCCAL installation parameter is set to NO, the system protects the internal repair price and records the base price of the part in the **R5FIFO** table.

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### Scrapping parts

Scrap parts that are beyond repair.

**Note:** Parts must be repairable spares to scrap.

To scrap parts:

1. Open the **Parts** form.
2. Select the part to scrap, and then click the **Stock** tab.
3. Select the specific stock to scrap, and then click **Scrap Part**. The system automatically populates **Part**, **Description**, **Qty. for Repair/UOM**, and **Asset ID** if the part is tracked by asset.
4. **Scrap Qty.**—Enter the quantity of parts to scrap.
5. Click **Submit**.

### Defining substitute parts

Define parts that can be substituted for other parts. Parts do not have to be substituted in a one-to-one relationship. You cannot add a substitute part to a condition tracked parent part. However, you can associate substitute parts to condition tracked child parts.

To define substitute parts:

1. Open the **Parts** form.
2. Select the part for which to define a substitute, and then click the **Substitutes** tab.
3. Click **Add Substitute**.
4. **Substitute Part**—Enter the part to serve as a substitute. The system automatically populates the part description and **Substitute Part Org**.
5. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6. **Fully Compatible**—Select to indicate the original and substitute parts can serve as substitute parts for each other, e.g., if you define Part A as a substitute for Part B and select **Fully Compatible**, the system automatically displays Part B as a substitute for Part A as well.

**Note:** To remove a substitute, select the substitute to remove, and then click **Remove Substitute**.
If you remove a substitute that was specified as Fully Compatible, the system removes the association for both parts, e.g., Part A is not a substitute for Part B and Part B is not a substitute for Part A.

Changing part numbers

Modify part numbers/codes for temporary part numbers or existing parts.

During the requisition and purchase order process, the system assigns a temporary part number to a part to prevent the part from appearing in the parts catalog several times with different part numbers. System-generated part numbers begin with the character "N." Allocate a new part number to one of the system-generated temporary part numbers or change the temporary number to an existing part number. The system retains the part information from the purchase order and creates a new part record.

Additionally, many companies assign part codes to parts in their part catalog based on a supplier's catalog number for the part. Frequently, a supplier's catalog is updated or changes over time, so an existing part in your part catalog may lose its association with the supplier catalog number. Therefore, you may need to update an existing part code to retain the purchasing history and historical information for the part, rather than creating a new part to associate with the updated supplier catalog numbers.

When you modify condition tracked parent part numbers, the system automatically changes the part numbers for the condition tracked child parts. The last two characters (Suffix Separator and Suffix Code) of the child part number must remain unchanged.

Note: If installation parameter AUTOPNUM is set to Yes, you may change a temporary or existing part number; however, the system automatically changes the part number to the next available part number within the system.

To change part numbers:

1. Open the Parts form.
2. Select the part for which to modify the part number, and then right-click on the form in the Record View.
3. Select Change Part Number.
4. Class—Enter the part class. The system automatically populates Class Org.
5. New Part—Enter the new part number. The system automatically populates New Part Org. and New Part Description based on the current organization and description of the part.
   
   Note: You may either enter an existing part number or enter a part number that does not exist currently in the system by typing the number in New Part. The new part number cannot begin with the character "N" followed by a number.

6. Use Auto-number—Select to have the system automatically assign the next available part number as the new part number.
   
   Note: If you select Use Auto-number, the system protects New Part. You cannot enter a new part number.

7. Click Submit.
Viewing part number history

View all modifications of part numbers.

To view part number history:

1. Open the Part Number History form.
2. **Dataspy**—Select an existing Dataspy or edit an existing Dataspy to view records. The system applies the Dataspy to the list view, and displays the records.
3. View the part number history.

Viewing part reservations for stores

View part reservations for parts in store that are reserved or allocated.

To view part reservations for stores:

1. Open the **Stores** form.
2. Select the store for which to view part reservations, and then click the **Reservations** tab.
3. View the reservations for the part in the selected store.

Defining and managing manufacturer information

Manufacturer information is more than a listing of manufacturers of parts. You can associate manufacturers with parts in a concise and organized manner and attach other relevant information relating to manufacturers and parts, e.g., drawing numbers, manufacturer part numbers, and local part numbers. Complete supplier information on the **Supplier** form prior to defining manufacturers and parts information.

Defining manufacturer information

To define manufacturer information:

1. Open the **Manufacturer** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the manufacturer belongs if you use multi-organization security.
4. **Manufacturer**—Enter a unique code identifying the manufacturer, and then enter a description of the manufacturer in the adjacent field.
5 **Class**—Enter the class of the manufacturer. The classes shown belong to the MANU entity. The system automatically populates **Class Org**.

6 **Supplier**—Enter the manufacturer’s supplier. The system automatically populates **Supplier Org**.

7 **Out of Service**—Select if the manufacturer is out of service.

8 Click **Save Record**.

### Associating parts with a manufacturer

Associate parts with a manufacturer record. If you have multiple parts for one manufacturer, the system allows you to associate each of them with that manufacturer. For each part that you associate with a manufacturer, enter your part code and the manufacturer’s part code. The system will automatically cross-reference the manufacturer’s part codes with your part codes based on the information you provide.

To associate parts with a manufacturer:

1 Open the **Manufacturers** form.
2 Select the manufacturer for which to associate parts, and then click the **Parts** tab.
3 Click **Add Part**.
4 **Part**—Enter your part code. The system automatically populates the part description and **Part Org**.
5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6 **Manufacturer Part Number**—Enter the manufacturer part code.
7 **Out of Service**—Select if you do not want the system to display the manufacturer part number in the manufacturer part number lookups.
8 **Drawing Number**—Enter the drawing code if a drawing of the part is available.
9 Click **Submit**. Add additional parts as necessary.

**Note:** To delete a part from the Parts list, select the part to delete from the list, and then click **Delete Part**.

The system does not delete the record if the manufacturer and the manufacturer part number are selected on the **Stores** page of the **Parts** form as the **Primary Manufacturer** or **Primary Manufacturer Part Number**.

### Defining and managing supplier information

Large maintenance organizations deal with many suppliers. There are suppliers for parts, equipment, services, rentals, office supplies, and more. The **Suppliers** form is the primary form for setting up a supplier network. Within this form, establish a list of suppliers, create a catalog of parts provided by specific suppliers, and list contacts for suppliers. You can also associate addresses for suppliers.
You can also create a supplier hierarchy to establish parent/child relationships between suppliers. When creating a supplier hierarchy, you cannot designate a supplier as a parent supplier if the supplier is already designated as a child in a supplier hierarchy. Additionally, a supplier cannot have multiple parent suppliers, nor can a supplier be parent supplier to itself within a supplier hierarchy. For example, you create supplier records for the following three suppliers: AMG INC, HARTFORD BOILERS, and SOUTHEASTERN. To create a supplier hierarchy, you select AMG INC as the parent supplier for both HARTFORD BOILERS and SOUTHEASTERN. Because HARTFORD BOILERS and SOUTHEASTERN are designated as children of AMG INC, neither can be selected as a parent supplier in any other supplier hierarchy, nor can they be designated as a child to any other supplier in another supplier hierarchy.

After defining supplier information, you can update information for both suppliers and their catalogs as necessary; however, you cannot delete a supplier record or a record from a supplier’s catalog if they have been associated with another record within the system.

Defining suppliers

Define suppliers to create records for the suppliers in your supplier network.

**Purchase Site** and **Service Provider** indicate whether you can purchase materials and/or services from the supplier. If you unselect **Purchase Site**, you cannot select the supplier for purchase orders for materials. Likewise, if you unselect **Service Provider**, you cannot select the supplier for purchases for services or labor.

Additionally, you can specify minimum and maximum order values for the supplier to establish limits for purchasing from this supplier. The system prevents you from creating purchase orders or requisitions for the supplier if you exceed the specified maximum or fail to meet a minimum order value for purchasing materials or services.

To define supplier:

1. Open the **Suppliers** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the supplier belongs if you use multi-organization security.
4. **Supplier**—Enter a unique code identifying the supplier, and then enter the supplier’s name in the adjacent field.
5. **Language**—Select the supplier’s language.
6. **Currency**—Enter the supplier’s currency.
7. **Class**—Enter the class of the supplier. The classes shown belong to the COMP entity.
8. **Out of Service**—Select to indicate that you no longer wish to use this supplier. If you select **Out of Service**, the system retains the record; however, it will no longer display the supplier in the lookups from which you select suppliers on any other forms within the system.
9. **Status**—Enter a status to categorize the supplier by status. Define the status field for any purpose (e.g., enter AC if the supplier is being actively used). The status is for your informational use only.
10. **iProcure Vendor**—Enter the vendor to associate with the supplier for use with iProcure transactions.
11 **Account Number**—Enter the supplier’s iProcure account number.

12 **Purchase Site**—Select to indicate that you purchase goods from this supplier. Selecting **Purchase Site** inserts the supplier into the lookup from which you select suppliers on any other forms within the system. Unselect to indicate that the supplier is only for purchasing labor or services.

13 **Parent Supplier**—Enter the parent company. Using the "Parent" attribute, you can indicate whether a supplier is part of a larger organization. Parent/child supplier relationships can be established for information only.

   **Note:** You cannot designate a supplier as a parent supplier if the supplier is already designated as a child in a supplier hierarchy. Additionally, a supplier cannot have multiple parent suppliers, nor can a supplier be a parent supplier to itself within a supplier hierarchy.

14 **Lead Time (Days)**—Enter the average number of days the supplier needs to provide the ordered goods or services.

15 **Real-time Info**—Select to indicate that the supplier provides real-time information for the items they supply via iProcure.

16 **Service Provider**—Select to indicate that the supplier provides services. Unselect to indicate that the supplier is only for purchasing materials. If unselected, the supplier cannot be selected for purchasing or requisitioning labor.

17 **Min. Order Value**—Enter the minimum order amount.

18 **FOB Point**—Enter the supplier’s free on board shipping point.

19 **Ship Via**—Enter the supplier’s method of shipping.

20 **Payment Method**—Enter the supplier’s preferred method of payment.

21 **Max. Order Value**—Enter the maximum order amount.

22 **Payment Terms**—Enter the supplier’s payment terms.

23 **Freight Terms**—Enter the supplier’s freight terms.

24 **Buyer**—Enter the primary buyer for this supplier.

25 **Contact Name**—Enter the primary supplier contact.

26 **Telephone** and **Fax Number**—Enter the supplier’s phone and fax numbers.

27 **E-mail Address**—Enter the supplier contact’s e-mail address.

28 **Our Contact**—Enter the supplier’s primary contact for your organization, which is generally the corporate buyer.

29 **EDI Number**—Enter the supplier’s electronic data interchange (EDI) number for processing electronic transaction information.

30 **Customer**—Select to indicate the supplier is a customer. Selecting **Customer** inserts the supplier into the lookup from which you select customers on any other forms within the system. If **Customer** is unselected, the supplier cannot be selected for customer contracts or rentals.

31 **Customer Account Code**—Enter the supplier’s customer account code.

32 **Customer Cost Center**—Enter the supplier’s customer cost center.

33 **Tax Code**—Enter the supplier’s tax code.

34 Click **Save Record**.
Defining contacts for suppliers

Define contacts to have a reference library of contacts for each supplier. Maintain a list of supplier contacts for various purposes, e.g., customer service, shipping, and billing, in addition to the primary contact specified on the Record View page of the Suppliers form.

To define contacts for suppliers:

1. Open the Suppliers form.
2. Select the supplier for which to define contacts, and then click the Contacts tab.
3. Click Add Contact.
4. Sequence—Enter a sequence number to associate with the contact.
5. Name—Enter the contact’s name.
6. E-mail Address—Enter the contact’s e-mail address.
7. Telephone—Enter the contact’s telephone number.
8. Fax Number—Enter the contact’s fax number.
9. Click Submit.

Note: To delete a contact, select the contact to delete, and then click Delete Contact.

Copying suppliers

Copy a supplier including all details to a new supplier.

To copy suppliers:

1. Create a supplier.
2. Right-click, and then select Copy Supplier.
3. New Supplier—Enter the name of the new supplier. The system automatically populates the New Supplier description.
4. Select the record types to copy, and then click Submit.

Creating a supplier catalog

Create a supplier catalog to establish and maintain a list of the materials provided by a supplier.

To create a supplier catalog:

1. Open the Suppliers form.
2. Select the supplier for which to create a catalog of parts, and then click the Parts tab.
3. Click Add Part.
4. Part—Enter the part to add to the requisition. The system automatically populates Part Org., Exchange Rate, and Date Last Updated.
5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

6 **Supplier Part Desc.**—Enter the supplier’s description of the part.

7 **Catalog Reference**—Enter the supplier’s part number. It may be identical to the existing part number.

8 **Gross Price**—Enter the supplier’s price for the part without discounts or additional fees. After adjusting gross price for discounts and additional fees, the system updates **Net Price** and calculates **Local Price** based on the currency of the organization with the following equation:

\[
\text{Price} / \text{Exchange Rate} / \text{Qty. per UOP} = \text{Local Price}
\]

9 **Repair Price**—Enter the supplier’s price for repairing the part.

**Note:** Repair Price is only enabled if the **Part** is core tracked.

10 **Tax Code**—Enter the tax code for the part that identifies the tax structure to apply all of the applicable taxes to purchases of this part.

11 **Preferred Supplier**—Select to indicate that this supplier is the preferred supplier of the part.

12 **Expiration Date**—Enter the expiration date indicating the date on which the supplier’s catalog information should be replaced with a new catalog entry (new price, part number, etc.).

13 **Comments**—Enter comments for the supplier/part combination as necessary.

14 **Minimum Order Qty.**—Enter the minimum quantity of the part that you can order from this supplier.

15 **UOP**—Enter the unit of measure of purchase for the part.

16 **Qty. per UOP**—Enter the conversion factor if the purchase unit of measure is different from the inventory unit of measure.

17 **Lead Time (Days)**—Enter the average number of days that the supplier needs to provide the ordered goods.

18 **Repair Part Number**—Enter the number/code for the supplier who will actually be repairing the part.

**Note:** Repair Part Number is only enabled if the **Part** is core tracked.

19 **Click Submit.**

**Note:** To delete a part, select the part to delete, and then click **Delete Part**.

The system automatically populates the **Date Last Updated** with the system date of the most recent changes to the part record.

To add iProcure item association, click **Add iProcure Item Association.**

To update iProcure items in the parts catalog, click **Update iProcure Items.**

To update selected iProcure items in the parts catalog, click **Update Selected iProcure Items.**

To view iProcure sync errors, click **View iProcure Sync Errors.**

To create an alternate supplier catalog reference, click **Alternate Catalog Reference.**

### Associating alternate catalog references for suppliers

Alternate supplier catalog references allow customers to keep a record of past catalog reference numbers for a specific part.
To associate alternate catalog references for suppliers:

1. Open the Business Partners form.
2. Select the supplier for which to create an alternate catalog reference of parts, and then click the Parts tab.
3. Click Alternate Catalog of References.
4. Click Add Catalog Reference.
5. Catalog Reference—Enter the catalog reference number to which to associate to the supplier.
6. Notes—Enter notes for the catalog reference as necessary.
7. Click Submit.

   Note: To delete an alternate catalog reference, select the alternate catalog reference to delete, and then click Delete Catalog Reference.

Viewing purchase order history for suppliers

To view purchase order history for suppliers:

1. Open the Business Partners form.
2. Select the supplier for which to view purchase order history, and then click the POHistory tab.
3. View the purchase order history for the supplier. The POHistory page displays the same information as the Purchase Orders form.

Adding services to suppliers

To add services to suppliers:

1. Open the Suppliers form.
2. Select the supplier to which to add a service, and then click the Services tab.
3. Click Add Service.
4. Task—Enter the work order task that corresponds with the supplier’s service. The system automatically populates the task description, Task Org., and Exchange Rate.
5. Catalog Reference—Enter the supplier’s catalog reference number for the service.
6. Price—Enter the supplier’s cost and currency for the service.
7. Tax Code—Enter the tax code for the service and supplier.
8. Preferred Supplier—Select if the supplier is the preferred supplier for the service.
9. Expiration Date—Enter the expiration date for the service and supplier. This is just a "catalog" date, and the date entered indicates the date on which the supplier’s catalog information for the service should be replaced with a new catalog entry (new price, number, etc.).
10. Purchase UOM—Enter the supplier’s unit of measure for the service.
11 Qty. per UOP—Enter the quantity per unit of purchase for the service.

**Note:** If you enter Purchase UOM, enter Qty. per UOP to indicate the unit of purchase in relation to the unit of measure that the supplier has defined for the service, e.g., you hire a supplier to landscape. The supplier defines his services in hours. It will take the supplier 5 hours to landscape. Enter the code for hours in Purchase UOM, and then enter 5 in Qty. per UOP.

12 Lead Time (Days)—Enter the average number of days that the supplier needs to provide the service.

13 Click Submit.

The system inserts the current date in Date Last Updated and calculates Local Price based on the currency of your organization with the following equation:

\[(\text{Price} / \text{Exchange Rate}) / \text{Qty. per UOP} = \text{Local Price}\]

**Note:** To remove a service, select the service to remove, and then click Remove Service.

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**Defining rates for suppliers**

Define and update rates for suppliers. Define multiple rates for each supplier as necessary.

**Note:** When automatically populating Hourly Rate on any form, the system populates the field based on the information entered on the Rates page of the Business Partners form. If you do not define a rate for a supplier, the system populates Hourly Rate based on the information entered on the Rates page of the Trades form if applicable.

To define rates for suppliers:

1. Open the Business Partners form.
2. Select the supplier for which to define rates, and then click the Rates tab.
3. Click Add Rate.
4. **Organization**—Enter the organization to which the rate belongs if you use multi-organization security.
   
   **Note:** If the supplier is assigned to a specific organization, the system automatically displays the organization. You cannot modify Organization.

5. **Trade**—Enter the trade.
6. **Hourly Rate**—Enter the hourly rate of the trade.
7. **Tax Code**—Enter the tax code to associate to the rate for the supplier.
8. **Start Date** and **End Date**—Enter the beginning and ending dates to which the rate applies.
   
   **Note:** Dates for the same trade and rate combination cannot overlap, e.g., the MAINT trade cannot have a rate of 20 to start 01-01-2004 and to end on 01-01-2005 and another rate of 25 to start on 06-01-2004.

9. Click Submit.

   **Note:** To delete a rate, select the rate to delete, and then click Delete Rate.
Associating commodities with suppliers

Define commodity codes before associating commodities with suppliers.

The system allows you to associate multiple commodities with each supplier.

To associate commodities with suppliers:

1. Open the Suppliers form.
2. Select the supplier with which to associate a commodity, and then click the Commodities tab.
3. Click Add Commodity.
4. Commodity—Enter the commodity to associate with the supplier. The system automatically displays the commodity description and Commodity Org.
5. Click Submit.

Note: To remove a commodity, select the commodity to remove, and then click Remove Commodity.

Recording fuel mixes for associated commodities

Record the fuel mix for each commodity associated with a supplier.

To record fuel mixes for associated commodities:

1. Open the Business Partners form.
2. Select the supplier for which to record fuel mixes, and then click the Fuel Mix tab.
3. Click Add Record.
4. Commodity—Enter the commodity for which to record fuel mixes.
5. Fuel Type—Select the type of fuel used for the associated commodity.
6. Daily Capacity—Enter the amount for the daily capacity. The system automatically populates the daily capacity UOM and % of Total Capacity.
7. Date Effective—Enter the date this record will become effective. The system automatically populates Date Expired.
8. Click Submit.

Associating account numbers to suppliers

Associate an account number to a supplier for a specific store.

To associate account numbers to suppliers:

1. Open the Suppliers form.
2. Select the supplier for which to associate an account number, and then click the Account Number tab.
3. Click Add Account Number.
4 **Account Number**—Enter a unique code identifying the supplier account.
5 **Store**—Enter the store to associate to the supplier account.
6 **Payment Method**—Enter the supplier’s method of payment for this account.
7 Click **Submit**.

**Managing stock information**

Stock refers to the basic information on items contained within a store (or group of stores in the same company). Think of stock as a subset of parts—every item in stock must be a part, but not every part must be in stock. Stock is a list of items held; a parts list is your list of items available for purchase from outside sources or items that you generally do not stock.

You can associate stores with parts and enter automatic reorder information for parts. Consider how the stock item is reordered. The inventory unit of measure may be 'each' but the purchasing unit of measure may be based on item, case, or gross. If the maximum level is 20 and your minimum level is 10, but you reorder the item by the case (with 24 items per case), you need to adjust levels.

Consider the vendor lead time. Some stock items may be reordered every 60 days and others may be reordered every 30 days. You may want to order a higher quantity of items for those 60-day periods. Also, some items take longer to procure and you may have to increase reorder amounts to have enough on hand.

Specify the stock replenishment method for the part. You can set the stock method to Min/Max, Reorder Level, or On-Demand.

If you are using LIFO/FIFO as your pricing method for stock, the system records the unit price of each receipt transaction for stock so that each subsequent inventory transaction is recorded at the appropriate unit price. See "Understanding time-based inventory valuation (LIFO/FIFO)" on page 180.

**Associating stores with parts**

Associating stores with parts enables you to specify detailed inventory information for specific parts, such as minimum stock levels and reorder quantities that determine how your company’s stock levels are maintained.

Additionally, you can also define part prices at the stock level enabling you to enter and update pricing information for each store in which the part is held.

Additionally, if you select **Last in first out price** (LIFO) or **First in first out price** (FIFO) as the **Price Type** for the part in the store, the system inserts a record for the part in the R5FIFO table when the part is received to stock that includes the part, price, quantity, store, and transaction date. The transaction date indicates the date the stock is inserted into inventory upon which all future LIFO/FIFO transactions for the part are based. For FIFO pricing, the system locates the record that was inserted into inventory first. For LIFO pricing, the system locates the record that was most recently inserted into inventory.
Depending on your system configuration, set the stock replenishment method for the part in stock and specify minimum and maximum quantities, a reorder level, and/or an order quantity as necessary.

The INVMETH installation parameter determines the default stock method for new parts in stock in all stores as Reorder Level (-). Modify the stock method for a part in stock in any store as necessary. If you have not modified the INVMETH parameter or do not specify a stock method for a stock record, the system automatically sets the stock method to Reorder Level.

Additionally, the system does not implement any of the stock methods for a part until you enter the information required to implement the stock method for the part. For example, if you set the stock method of a part in stock to Min/Max, you must enter a value Minimum Qty. and Maximum Qty. to implement the stock method for the part.

To associate stores with parts:

1. Open the Parts form.
2. Select the part for which to define store information, and then click the Stores tab.
3. Click Add Store.
4. Store—Enter the store for the part. The system automatically populates the store description, Store Org., Stock Date with the current system date, and Base Price with the appropriate price of the part. The system also populates Stock Value with the current value of the quantity on hand for the part using the base price of the part in stock. The system populates Credit Balance with the amount of credit associated with the part for an invoice line.

   Note: Credit Balance is applied to the Average Price of the part based on the INCREDIT installation parameter upon approval of a new invoice and/or a credit or debit note applied to an invoice or an invoice line.

5. Core Value—Enter the core value of the part at the store level. The core value is the value of the part while it is in stock awaiting repair (for both external and internal repairs). For example, you have a part CS-ST-SPROCKET-249x284 IN part (a carbon steel skip tooth sprocket .249" x .284" thickness) valued at $200. The core value of CS-ST-SPROCKET-249x284 IN is $70. You issue one CS-ST-SPROCKET-249x284 IN valued at $200 to a piece of equipment. You also return one CS-ST-SPROCKET-249x284 IN taken off of the piece of equipment for repair. Because the CS-ST-SPROCKET-249x284 IN must be sent to the machine shop for repair, the system does not issue an inventory credit of $200. Instead, the system issues a credit of the $70 core value to your inventory.

6. Stock Class—Enter the stock class for the part.
7. Preferred Supplier—Enter the preferred supplier for the part.
8. Preferred Store—Enter the preferred store for the part.

   Note: You cannot enter a value for both Preferred Supplier and Preferred Store. Preferred Supplier and Preferred Store are both used for automatically generating requisitions from low stock to provide different information for the requisition. Entering a Preferred Supplier for the part in store indicates that the requisition type for the part is Goods Requested. Entering a Preferred Store indicates that the requisition type for the part in store is a Store-to-Store transfer.

9. Lead Time (Days)—Enter the average number of days that the store needs to provide the part. The Lead Time (Days) indicates a number of days that are needed internally for inventory deliveries or transfers of the part from the store. Lead Time (Days) is only used for store-to-store requisitions.
Note: You can also enter Lead Time (Days) on the Record View page of the Stores form. The setting of Lead Time (Days) on the Stores page of the Parts form overrides the setting of Lead Time (Days) on the Record View page of the Stores form.

10 ABC Class—Select the class (A, B, or C) with which to associate the stock items. The system uses this information to perform ABC analysis.

11 Stock Method—Select one of the following stock method types:

- **Min/Max**—Select to replenish low stock based on a specified minimum and maximum quantity of a part to keep in stock. When the quantity of a part in stock reaches a level that is less than the specified minimum level, the system reorders the necessary quantity of the part to replenish the quantity to the specified maximum level. Reorder Level and Order Qty. are read-only when Stock Method is Min/Max.

- **Reorder Level**—Select to replenish low stock based on a specified reorder level and order quantity. When the quantity of a part in stock reaches the reorder level, the system reorders the part in increments of the specified order quantity until the quantity of the part in stock reaches a level that is greater than or equal to the reorder level. Maximum Qty. is read-only when Stock Method is Reorder Level.

- **On Demand**—Select to replenish low stock only when there is a demand for it on a work order or store-to-store requisition. Reorder Level and Maximum Qty. are read-only when Stock Method is On Demand.

- **Reorder Level**—Enter the quantity at which the system is to reorder the part. The value entered for Reorder Level specifies the quantity of a part that, when reached, triggers a purchase action for acquiring more of that part.

12 Prevent Issue from Default Return Bin—Select this checkbox to prevent the part from being issued from the default return bin.

13 Order Qty.—Enter the standard quantity of this part ordered at one time.

14 Condition—Enter the condition if the part is a condition tracked parent part. The system automatically populates Part and Part Org. If the part is a condition tracked child part, the system automatically populates Condition, Part, and Part Org.

Note: If the asterisk (*) condition is entered, store records will be created for each condition tracked child associated with the part. Also, the system will automatically populate Part and Part Org. for each store record with the values of the condition tracked child part and part org. The condition for each store record will be the same as the condition for each condition tracked child. If the condition entered is not an asterisk (*), Part and Part Org. will be automatically populated with the part and part org. of the child part condition associated with the selected condition.

15 Conditions to Include in Reorder—Enter the conditions to include when the part is reordered if the part is tracked by condition. Only Qty. on Hand for part conditions listed in the Conditions to Include in Reorder will be considered.

16 Record Stockouts—Select to enable the system to create a record of the part, store, and date on which the inventory level for this part reached zero. You can view this information on a separate form.

17 Label Printer—Enter the default printer for printing barcode labels.
18 **Label Template (Issue)**—Enter the default label template for printing barcode labels for issues.

19 **Label Template (Receipt)**—Enter the default label template for printing barcode labels for purchase order receipts.

20 **Label Printing Default**—Select the default method for printing labels when the part is received to the selected store.

21 **Default Bin**—Enter the default bin for the part. The system automatically populates the Default Bin Qty. with the quantity of the parts located in the selected bin.

22 **Label Template (Non-PO Receipt)**—Enter the default label template for printing barcode labels for non-purchase order receipts.

23 **Label Template (Core Return)**—Enter the default label template for printing barcode labels for core returns.

24 **Click Submit.**

**Note:** To delete a store, select the store to delete, and then click **Delete Store**. You cannot delete a store associated with a part if a stock record exists for the part in that store.

Click **Add/Edit Comments** to enter comments.

To add, edit, view, or associate a document to the STOC entity, click **Add/Edit Documents**. See "Viewing and Modifying Associated Documents," "Defining Documents," or "Uploading Documents."

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**Entering stock information for parts**

When you enter stock information for parts, you can select the **Store, Bin,** and **Lot** for the part in store. The system automatically enters the **Price** based on the calculated **Base Price** of the part, and you can modify the **Price** as necessary.

If you do not enter a **Qty. on Hand** for the part when entering a stock record, the system creates a new stock record for the part but does not create a stock transaction.

If you are using LIFO/FIFO as your pricing method, the system creates a record for the part in the **R5FIFO** table and creates a receipt transaction for the stock initialization of the part.

To enter stock information for parts:

1 **Open the Parts form.**
2 **Select the part for which to define stock information, and then click the Stock tab.**
3 **Click Add Stock Record.**
4 **Store**—Enter the store for the part. The system automatically populates the store description and the **Store Org.**
5 **Condition**—Enter the condition if the part is a condition tracked parent part. The system automatically populates **Part** and **Part Org.** If the part is a condition tracked child part, **Condition** will be automatically populated with the condition of the selected part.

**Note:** If the asterisk (*) condition is entered, store records will be created for each condition tracked child associated with the part. Also, the system will automatically populate **Part** and **Part Org.** for each store record with the values of the condition tracked child part and part org. The condition for
each store record will be the same as the condition for each condition tracked child. If the condition entered is not an asterisk (*), Part and Part Org. will be automatically populated with the part and part org. of the child part condition associated with the selected condition.

6 Bin—Enter the bin number storing the part.
7 Lot—Enter the lot number or batch of the part.

Note: The SHOWLOT installation parameter determines whether lots are used for stock information for parts. The default setting for SHOWLOT is Y. If SHOWLOT is set to N, the system disables Lot, and it is hidden.

8 Qty. on Hand—Enter the available quantity of the part.

9 Core Qty.—If the part is core tracked, enter the number of core parts that are currently in this Bin location. These are parts that you plan to repair on internal repair work orders or to send to a supplier on external repair requisitions. The value of Core Qty. is available for work orders and requisitions. The system automatically populates UOM.

Note: You can only enter a value for Core Qty. when inserting a stock record. You cannot edit or modify Core Qty. after saving the record.

The system does not create a stock transaction for the part when you enter a value for Core Qty., nor does it make any price updates until the part is repaired and received back to Qty. on Hand.

If you attempt to delete the stock record for the part, the system verifies both the Qty. on Hand and the Core Qty.. If both the Qty. on Hand and the Core Qty. are not equal to 0, the system will not allow you to delete the stock record for the part.

10 Click Submit.

Note: If you enter a value greater than zero for Qty. on Hand, the system also creates a receipt transaction of type RECV for the part. However, if you enter zero as the quantity or do not enter a value for Qty. on Hand, the system creates a stock record for the part but does not create a receipt transaction for the part.

The system does not create a receipt transaction for the part when you enter a value for Core Qty., nor does it make any price updates.

The system treats the stock information entered for this part as a stock receipt and updates the Last Price of the part.

To delete a stock, select the stock to delete, and then click Delete Stock Record. You cannot delete a stock record for a part if the quantity on hand of the part is greater than zero.

The system displays an Asset ID if the part is tracked by asset.

The system populates Price based on the setting of the PRICELEV installation parameter. If PRICELEV is set to P, the system populates Price with the base price of the part from the Prices tab of the Parts form. If PRICELEV is set to S, the system populates Price with the base price of the part from the Stores tab of the Parts form, and you can change the price as necessary.

To record a stockout for a store, select the store, and then click Record Stockouts.
Recording stockouts for parts

Record a stockout when the part's Qty. on Hand is not enough to fill the demanded Part Qty.

To record stockouts for parts:

1. Open the Parts form.
2. Select the part for which to record a stockout, and then click the Stock tab.
3. Select a store, and then click Record Stockout. The system automatically populates Store, Part, and Part Org.
4. Stockout Qty.—Enter the number of parts missing that are required to complete the transaction.
5. Date/Time—Enter the date and time the stockout occurred, i.e., the day there was not enough of the part in inventory to issue to fill the demand.
6. Click Submit.

Calculating economic order quantity (EOQ)

Calculate the EOQ for a store to determine the most efficient quantity to order for inventory items. EOQ represents the ideal balance between ordering costs and inventory holding costs for items being demanded annually at a constant rate. EOQ helps manage inventory by minimizing order costs and holding costs for each item.

To calculate EOQ:

1. Open the Calculate EOQ form.
2. Organization—Enter the organization for which to calculate EOQ if you use multi-organization security.
3. Date From—Enter the date of the item’s first analysis.
4. Date To—Enter the date of the item’s last analysis.
5. Store—Enter the store for which to calculate EOQ.
6. Part—Enter the part for which to calculate EOQ.
7. Stock Class—Enter the class of the stock for which to calculate EOQ.
8. ABC Class—Select the class of the stock (A, B, or C) for which to calculate EOQ.
9. Choose one of the following options:
   - % of Average Price—Select to calculate EOQ with a percentage of average price. Skip step 11.
     
     Note: The system uses this equation to calculate EOQ based upon % of Average Price. Holding Cost % is required.
EOQ=

- **Fixed Value**—Select to calculate EOQ with a fixed value. Skip step 10.

**Note:** The system uses this equation to calculate EOQ based upon Fixed Value. **Holding Cost** is required.

\[
EOQ = \sqrt{\frac{2 \times \text{Annualized Qty Demanded} \times \text{Order Cost}}{\text{Average Price} \times (\text{Holding Cost} \times 100)}},
\]

If Average Price = 0 then EOQ = 0.

10 **Holding Cost %**—Enter the cost for the holding percentage.
11 **Holding Cost**—Enter the holding cost.
12 **Fixed Order Cost**—Enter the fixed order cost.
13 **Print Calculated EOQ**—Select to print the EOQ report.
14 Click **Process**.
15 Select each store for which to update the order quantity.
16 Click **Update Order Qty**. The system updates the order quantity on the **Stores** page of the **Parts** form for each selected parts record with the value in **New Order Qty**.

**Transferring parts between bins**

Transfer parts between bins within the same store. Transferring parts between bins does not create a stock transaction, because inventory levels for the part remain the same.

To transfer parts between bins:

1 Open the **Parts** form.
2 Select the part to transfer between bins, and then click the **Stock** tab.
3 Select the store, bin, and lot from which to transfer the part, and then click **Transfer Part between Bins**.
4 **New Bin**—Enter the bin receiving the item.
5 **Transfer Qty.**—Enter the number of parts to transfer from the sending bin to the receiving bin. If the part to issue is tracked by asset, the system automatically selects **Track By Asset**, enters 1 as
the Transaction Quantity and Available Quantity, and displays the asset number by which the part is tracked for Asset ID.

**Note:** You cannot enter a Transaction Quantity greater than 1 when issuing parts tracked by asset. If you want to issue multiple quantities of a part tracked by asset, you must transfer the part with a Transaction Quantity of 1 until you have transferred the total number of the part tracked by asset that you wish to transfer from the sending bin to the receiving bin.

6 Click **Submit**. The system transfers the specified quantity of the part from the sending bin to the receiving bin, and updates the Qty. on Hand of the selected bins in the Stock list.

### Transferring parts without requisitions

Transfer parts from store to store without requisitioning them. Parts transferred using the **Quick Store-to-Store Transfer** form never achieve in-transit status. Since this tracking feature is not used for this type of transfer, store-to-store transfers should be reserved for very quick material movements. Quantities available both in the sending and receiving warehouses are adjusted immediately after the system saves the transaction.

When you transfer parts from store-to-store, the system creates a stock record for the transferred part in the receiving store for which the price type defaults to the price type of the receiving store. By default, the price type for a store is defined by the PRICELEV installation parameter; however, you can modify the price type for each store as necessary.

Using the **Quick Store-to-Store Transfer** form, define a transfer header and then add as many part records as there are parts to transfer. Before submitting your transaction, you can edit part records by selecting the part in the Transaction Details list. The system displays the part record in the detail section where you can edit information related to the transfer as necessary.

**Note:** If you are using multi-organization security, you can only transfer parts between stores without requisitions using the **Quick Store-to-Store Transfer** form if the stores you are transferring the parts between are in the same organization, if the parts belong to the common organization, and the organizations have the same currency.

To transfer parts without requisitions:

1 Open the **Quick Store-to-Store Transfer** form.
2 **Transfer Desc.**—Enter a description of the transfer.
3 **From Store**—Enter the store from which to transfer parts.
   **Note:** If a Default Bin is defined for the From Store, the system populates From Bin with the Default Bin, and the system populates the On Hand Qty. and Core Qty. based on the From Bin. The system will also populate the Bin.
4 **To Store**—Enter the store to which to transfer parts.
5 Click **Add Part**.
6 **Part**—Enter the part to transfer. The system automatically populates From Bin, To Bin, Lot, Price, and On Hand Qty. If the selected Part is core tracked, the system enables Transfer Core Qty. and populates Core Qty. with the number of parts designated as for repair in the From Bin.
Note: The value displayed for On Hand Qty. indicates the current quantity of the part that is available for the specified To Bin and Lot, which is equal to the On Hand Qty. minus any quantity of the part that is currently allocated to any work orders.

If you delete the From Bin, the system clears Lot and then calculates the On Hand Qty. and Core Qty. for the From Store, which is the sum of the quantities of the part in all the bins in the From Store.

The system calculates the Core Qty. as the difference between quantity for repair in the From Bin and the number parts that are assigned on the Repair Parts page of a Repairable Core work order and the number of parts that are currently on External Repair requisitions.

7 Condition—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate Condition.

8 From Bin—Modify the bin from which to transfer the part if necessary. If you modify From Bin, the system removes the part.

9 To Bin—Modify the bin to which to transfer the part if necessary. If you modify To Bin, the system removes the part.

10 Lot—Modify the lot of the part to transfer if necessary. If you modify Lot, the system removes the part.

11 Price—Modify the price of the part to transfer if necessary. If you modify Price, the system removes the part.

Note: When PRICELEV is set to S, the system automatically populates Price with the base price of the part in the receiving store.

12 Asset ID—Enter the code identifying the asset associated with the part to transfer. If the part is tracked by asset, the system enables Asset ID and you must enter an asset ID number for the part before you can enter values for Transfer On Hand Qty. or Transfer Core Qty.

13 Transfer On Hand Qty.—Enter the number of parts to transfer from the quantity of the parts available in the From Store.

Note: If the part is an asset part, you can only transfer one part at a time. The system automatically displays a transfer quantity of "1" for asset parts. On Hand Qty. shows how many parts are available in the store or store, bin, and lot.

14 Transfer Core Qty.—Enter the number of parts to transfer from the quantity of the parts designated for repair in the From Store.

Note: You can only enter a value for Transfer On Hand Qty. or Transfer Core Qty., but not both. When you enter a value for either Transfer On Hand Qty. or Transfer Core Qty., the system protects the other field.

If you enter a Transfer Core Qty., the system clears the From Bin, To Bin, Asset ID, Serial Number, Lot, and Expiration Date, and you must enter values for these fields manually.

If a Default Bin is defined for the To Store and you have not entered a value for Transfer Core Qty., the system populates To Bin with the Default Bin.

If no Default Bin is defined for the part in the To Store and you have not entered a value for Transfer Core Qty., the system populates To Bin depending on whether more than one bin stock record is defined for the part in the To Store. If more than one bin-stock record is defined for the part in the To Store, the system leaves the To Bin blank. If only one bin-stock record is defined for the part in the To Store, the system populates To Bin with the Bin from the bin-stock record.
15 Click Add to List.
16 Click Submit Transaction. The system immediately adjusts quantities available in the sending and receiving warehouses.

Generating requisitions

Generate requisitions from low stock levels to automatically create requisitions based on a stock replenishment method and specified generation options. The system provides three stock replenishment methods: Min/Max, Reorder Level, and On-Demand. The system also enables you to generate requisitions for external repairs of core tracked parts.

To generate requisitions from low stock, the system examines current stock levels in stores, reserved parts, and parts specified on requisitions, purchase orders, and in transit. The system then generates a default requisition for all parts below the acceptable level to reach the specified stock level for the parts. The system will either generate a requisition for a standard order quantity until the specified stock level is reached, or it will simply order the necessary number of parts depending on the information you have entered for the stock record.

Note: If you are using the On-Demand method, there is no minimum quantity of the part to maintain. The system generates a requisition for the part when there is demand for the part, e.g., there is a reservation for the part, but there is not enough of the part in stock to fill the reservation. If you make reservations for an event in the distant future, the system generates a requisition for the required materials. Infor EAM recommends the implementation of company policies to restrict reservation usage to a reasonable time frame in order to minimize excessive inventory.

To implement a stock replenishment method, you must specify a stock method for the part and enter a Minimum Qty., Maximum Qty., Order Qty., and/or a Reorder Level on the stock record, depending on the stock method you have selected. You also must enter a Preferred Supplier.

Set Auto Req. Status on the Stores form to Approved, and all stock requisitions automatically generated for that store are created with a status of Approved. Otherwise, you must manually approve all purchase requisitions generated with a status of Unfinished.

When generating requisitions, the system may generate more than one requisition. Based on the parameters you enter on the Generate Requisitions form, the system may select part lines with multiple store, supplier, and/or buyer combinations. When you click Generate, the system generates a different requisition for each individual store/supplier/buyer combination. The following table illustrates this concept.

<table>
<thead>
<tr>
<th>Store</th>
<th>Supplier</th>
<th>Buyer</th>
<th>Req. Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store 1</td>
<td>Supplier 1</td>
<td></td>
<td>10000</td>
</tr>
<tr>
<td>Store 1</td>
<td>Supplier 2</td>
<td></td>
<td>10001</td>
</tr>
<tr>
<td>Store 2</td>
<td>Supplier 1</td>
<td></td>
<td>10002</td>
</tr>
<tr>
<td>Store 2</td>
<td>Supplier 1</td>
<td>Buyer 1</td>
<td>10003</td>
</tr>
<tr>
<td>Store 2</td>
<td>Supplier 1</td>
<td>Buyer 2</td>
<td>10004</td>
</tr>
</tbody>
</table>
Note: User limits do not apply on the Generate Requisitions form.

To generate requisitions:

1. Open the Generate Requisitions form.
2. Parameter List—Select the saved selection parameters. The system retrieves the saved selection criteria.
3. Organization—Enter the organization from which to generate the requisition if you use multi-organization security.
4. Requesting Store—Enter the store for which requisitions should be generated.
   Note: To generate requisitions for all stores that begin within a specific letter, enter the letter followed by a percentage sign, e.g., you want to generate requisitions for all of your Houston locations, so you enter ‘H%’ in Store.
5. Supplier—Enter the supplier for which requisitions should be generated.
6. Buyer—Enter the buyer of the parts for which requisitions should be generated.
7. Preferred Store—Enter the store for which requisitions should be generated if the part in store is a store-to-store transfer.
8. ABC Class—Select the A, B, or C class of the parts for which requisitions should be generated.
9. Part Class—Enter the class of the parts for which requisitions should be generated.
   Note: To generate requisitions for all part classes that begin within a specific letter, enter the letter followed by a percentage sign.
10. Requested By—Enter the name of the person requesting the requisitions.
11. Default Approver—Enter the name of the person approving the requisitions.
   Note: The system uses the information you supply in Default Approver to populate Approved By on the Requisitions form. If Auto Req. Status on the Stores form is set to A (Approved) and you do not enter a default approver, the system will populate Approved By on the Requisitions form with your User ID.
12. Cost Code—Enter the cost code for the requisition.
13. Consignment Items—Select to generate requisitions for consignment items only.
14. Non-consignment Items—Select to generate requisitions for non-consignment items only.
15. All Items—Select to generate requisitions for both consignment and non-consignment items.
16. Generate Purchase Requisitions—Select to generate purchase requisitions.
   Note: To generate a requisition for parts that need to be purchased, you must set up a Preferred Supplier on the Stores page of the Parts form or a Preferred Supplier on the Record View page of the Parts form.
17. Generate External Repair Requisitions—Select to generate external repair requisitions.
   Note: If you select both Generate Purchase Requisitions and Generate External Repair Requisitions, the system processes the external repair requisitions first so that the core tracked parts will be repaired, rather than ordering new parts. Also, if you have selected both Generate Purchase Requisitions and Generate External Repair Requisitions and you need more than the quantity designated for repair, the system generates one requisition with both a repair line and a purchase line.
To generate external repair requisitions for core tracked parts, the core tracked parts must meet the specified parameter criteria. The following information must also be true or set up for a core tracked part on the Repair Details page of the Parts form to generate a requisition for the part: Core Qty. must be greater than 0, External Repair must be selected, you must have entered a Supplier for the part, and the Core Qty. must be greater than or equal to the Min. Repair Qty.

If you set up a Preferred Supplier on the Repair Details page of the Parts form, but you have not on the Stores page of the Part form, the system only generates lines of type External Repair regardless of whether you selected both Generate Purchase Requisitions and Generate External Repair Requisitions. If you have set up a Preferred Supplier on the Stores page of the Parts form, but not on the Repair Details page of the Parts form, the system only generates lines of type Stock Purchase regardless of whether you selected both Generate Purchase Requisitions and Generate External Repair Requisitions.

If you specified a Min. Repair Qty. on the Repair Details page of the Parts form, the system only generates repair requisitions if the Core Qty. is greater than the Min. Repair Qty.

If you selected Auto-Assign for a part on the Repair Details page of the Parts form, the system will assign repair details for external repair parts automatically.

18 Generate Store-to-Store Requisitions—Select to generate store-to-store requisitions.

Note: If you selected Generate Store-to-Store Requisitions, the system uses the same formula used to calculate Requested Qty. for purchase requisitions.

19 Include Child Store(s) Qty.—Select to include the quantities for all child stores of the selected Store in the requisition generation process.

20 Print Requisition—Select to print the generated requisitions.

21 Click Process. Depending on the generation options you have selected, the system retrieves part lines for low stock items and/or core tracked parts to be repaired externally that are not listed on an existing requisition.

The system calculates the parts to be added to the requisition based on the following equation and the generation options you have selected:

\[
(\text{Qty. on Hand} + \text{Qty. at Shop} + \text{Qty. at Supplier} + \text{the quantity of the part on requisitions} + \text{the quantity of the part on purchase order without requisitions} + \text{in transit Qty. without requisitions}) - (\text{Reserved Qty.} + \text{Qty. Requisitioned from store}) = \text{Quantity}
\]

If you are using the reorder level method—The system generates a requisition if the Quantity is less than or equal to the Reorder Level. The system calculates the Requested Qty. as a multiple of the Order Qty. that is necessary for the Quantity to reach a stock level greater than the Reorder Level.

If you are using the min/max method—The system generates a requisition if the Quantity is less than the Minimum Qty. The system calculates the Requested Qty. as the difference of the Maximum Qty. and the Quantity.

If you are using the on-demand method—The system generates a requisition if the Quantity is less than the quantity demanded. The system calculates the Requested Qty. as being equal to the difference of the qty. demanded and the Quantity.

22 Select the part lines for which to generate requisitions. The system automatically selects all of the part lines. You may remove individual lines from the list by unselecting the line. The system does not generate requisitions for unselected lines. The system automatically selects all of the part lines.
You may remove individual lines from the list by unselecting the line. The system does not generate requisitions for unselected lines.

**Note:** To select all the lines at once, check Select. To unselect all the lines at once, uncheck Select. The system never generates a requisition line for parts if Prevent Reorders is selected on the Parts form.

23 Click Generate.

**Note:** Depending on your system configuration, the system may require an electronic signature to authorize status initiations for requisitions. The system displays the eSignature popup when assigning a status for each requisition created.

## Creating requisitions

Create requisitions on the Requisition form to request materials or services from outside vendors. A requisition consists of a requisition header and requisition lines. You can create a requisition for stock items, direct materials, or services. Stock items are materials that are kept in store and are tracked for inventory. Direct materials are items that you requisition specifically for work orders.

The life cycle of a requisition is controlled by the requisition status. When you create a requisition, the system assigns Unfinished as the status of the requisition. After adding all of the necessary line items to the requisition, you can update requisition status as necessary based on your status change authorization privileges. Status change authorizations are set up on the Status Authorizations form.

When updating requisition status, you can also update other information on the requisition. However, the system enables and/or protects the fields available for update based on whether or not lines have been added to the requisition, as well as the status to and from which you are updating.

In addition to having the appropriate status change authorization to change the status of a requisition, a user must also be granted sufficient monetary approval limits for requisitions on the User form to approve a requisition. The LIMITLEV installation parameter determines whether the system validates requisition approval limit authorizations on the header level or at the line level, and if the total value of a requisition exceeds a user’s requisition approval at either the header or the line level, then the user cannot approve the requisition.

The system automatically sets the currency of the requisition header and lines based on the currency of the organization for which the requisition is being created. You can modify the currency of a requisition line to enable you to requisition specific materials in a different currency than the organization of the requisition header, as long as a valid exchange rate has been defined for the currency to which you are changing the requisition line.

Once the requisition has been reviewed and updated as necessary, change the status to Ready for printing and print the requisition if necessary. Then, change the status to Approved/active to make the requisition available for purchasing. After the requisition is approved, you can add it to a purchase order to be forwarded to a supplier.
Creating requisition headers

Create requisition headers to specify the supplier(s) from which to requisition parts.

To create requisition headers:

1. Open the Requisitions form.
2. Click New Record.
3. **Organization**—Enter the organization for which to create the requisition. The organization you select must be a specific organization to which you belong. The system automatically populates **Entered By** with the User ID of the logged in user and inserts the current date in **Date Requested**.
4. **Requisition**—Enter a description of the requisition in the adjacent field. The system assigns a requisition number after you save the record.
5. **Status**—Enter the status of the requisition.
6. **Store**—Enter the receiving store for the requisition if necessary.

   **Note:** If a Default Store is associated with the logged in user, the system will automatically populate the Store. You can assign a Default Store to a Department record. The Default Store can then be associated to a User ID by assigning a user to a Department, which will then associate a Default Store with the User ID. However, if no Default Store is associated with the logged-in user, then the system does not automatically populate Store, and you must enter the Store manually.
7. **Requested By**—Enter the employee requesting the items on the requisition.
8. **Attention To**—Enter the name or department that is receiving the part.
9. **Delivery Address**—Enter the address to which to deliver the items.
10. **Supplier**—Enter the supplier for the requisition. The system automatically populates **Supplier Org**.

   **Note:** When you select a supplier on the requisition header, the system automatically assigns the selected supplier to each of the requisition lines, but you can modify the supplier for requisition line items as necessary.

11. **Class**—Enter the class of the requisition. The classes shown belong to the REQ entity.
12. **Cost Code**—Enter the cost code with which to associate the cost of the requisition.
13. **Work Order–Activity**—Enter the work order and activity for which the items are being requisitioned.

   **Note:** When you specify a work order and activity at the requisition header level, the system automatically assigns the selected work order and activity to each of the requisition lines, and you cannot modify the work order or activity for requisition line items.

   Additionally, you can only select work orders of type JOB or PPM with a status of Released or Closed for which the Date Completed on the work order is earlier than the number of days set in the REQDAYS installation parameter.

   If the selected Work Order–Activity is a multiple equipment work order, the system enables **Equipment** and it is required.

14. **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:
   - Enter a specific equipment to which to distribute the cost of the requisition.
Materials management

- Enter **All Equipment** to evenly distribute the cost of the requisition to each equipment record on the work order.
- Enter **WO Header Equipment** to distribute the cost of the requisition to the equipment on the work order header only.

**15 Default Approver**—Enter the name of the person who will approve the requisition.

**16 Click Save Record.**

**Note:** The system populates and/or updates the following fields as parts and services are added to the requisition, or when the status of the requisition is changed or approved: **Part Lines, Service Lines, Requisition Lines, Total Part Value, Total Service Value, Total Req. Value, Approved By,** and **Date Approved.**

If the status of the requisition is set to **Rejected, Reject Reason** becomes required, and you must enter a reason for why the requisition was rejected.

After you have added the requested parts/services to the requisition, click **Generate PO** to manually generate a requisition.

The system automatically selects **Printed** if you print the requisition.

**Adding parts to requisitions**

Add parts to requisitions after creating the requisition header.

If you do not know the part number of the part(s) to add to the requisition, you can search for the part(s) using the supplier catalog reference number or the manufacturer part description.

The system automatically populates some fields on the requisition line with information entered on the requisition header. For example, if a supplier is entered on the requisition header, the system automatically designates that supplier as the supplier for each requisition line. While the status of an individual requisition line is Unfinished, you can complete or update information on the requisition line as necessary. However, the system protects some fields that can be automatically populated from the requisition header.

Additionally, when you requisition a part cataloged on the **Part** form, the system also retrieves information from the part record and automatically populates many fields. If you need to requisition a part you have not yet created on the **Part** form, you can manually create a new part as necessary. After adding all of the necessary parts to the requisition, update the Status of the requisition as necessary based on your status change authorization privileges. Status change authorizations are set up on the Status Authorizations. However, the system enables and/or protects the fields available for update based on the status from which you are updating the requisition.

To add parts to requisitions:

1. Open the **Requisitions** form.
2. Select the requisition to which to add parts, and then click the **Parts** tab.
3. Click **Add Part Line**.
Note: If the requisition line is generated from an RFQ, the system populates RFQ, RFQ Org., Quotation, Quotation Org., and Quotation Line when the line is created.

If an RFQ is generated from the requisition, the system populates RFQ, RFQ Org., and RFQ Line once the RFQ line is created. When a Quotation line is awarded for an associated RFQ line, the Quotation information is populated.

4 Supplier—Enter the supplier for the part.

5 Manufacturer—Enter the manufacturer for the part.

6 Supp. Catalog Reference—Enter the reference number for the part from the supplier catalog. If you enter a Supp. Catalog Reference, the system populates the Part, the part description, Supplier, Exchange Rate, and the Price from the supplier’s catalog.

Note: If the part has no price in the supplier’s catalog, the system retrieves the price from the stock record of the part.

If you have entered a Supplier and you also enter a new Supplier Catalog Reference, the system creates a new record of the part in the supplier’s catalog.

7 Manufacturer Part Number—Enter the manufacturer part number for the part. If you enter a Manufacturer Part Number, the system populates the Manufacturer and the part description.

Note: If you have entered a Manufacturer and you also enter a new Manufacturer Part Number, the system creates a new part record for the manufacturer.

8 Part—Enter the part to add to the requisition. The system automatically populates the part description and Part Org. and New Orders Not Allowed if the system is flagged to prevent reorders of this part. If the part has been flagged to prevent reorders, select a substitute part to continue.

9 Condition—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate Condition.

10 Type—Select the part type for the requisitioned line.

Note: If you select Direct materials as the Type for the requisition line, you must enter a value for Work Order–Activity.

11 Line—Modify the line number of the part on the requisition if necessary. The system automatically assigns the next incremental line number based on the setting of the INCRLINO installation parameter.

Note: You can only edit the Line number when inserting a record. After the record is saved, the system protects Line and it is read only.

12 Requested Qty.—Enter the requested quantity part of the part.

13 Price—Enter the price of the part. The system automatically populates the currency of the organization on the requisition header in the adjacent field.

Note: If you select a supplier on either the requisition line or header, the system automatically populates Price with the part price from the supplier’s catalog. Update the supplier on the requisition line as necessary.

Additionally, if the EXRTUPDT installation parameter is set to YES, you can also update the exchange rate for a requisition line when you modify the currency of the requisition line. If you update the exchange rate for a requisition line, the system recalculates the value of the requisition header based on the value of the new exchange rate.
Materials management

14 Status—Enter the status of the part. The system automatically assigns Unfinished as the status of the part, or the equivalent user code status.

15 Requested Before—Enter the date before which the requisitioned part must be received.

16 Attention To—Enter the name or department that is receiving the part.

17 Exchange Rate—Enter the exchange rate for the part on the requisition.

18 Cost Code—Enter the cost code with which to associate the cost of the requisition.

19 Work Order–Activity—Enter the work order and activity for which the items are being requisitioned.

Note: If a work order and activity are entered on the requisition header, the system also populates Work Order–Activity with the work order and activity from the requisition header and automatically set the Type for the requisition line to Direct Purchase (PD). However, you can change the Type to Stock Purchase (PS), and the system automatically clears the Work Order – Activity.

If the selected Work Order – Activity is a multiple equipment work order, the system enables Equipment and it is required.

20 Equipment—Choose one of the following options if the work order is a multiple equipment work order:

- Enter a specific equipment to which to distribute the cost of the part.
- Enter All Equipment to evenly distribute the cost of the part to each equipment record on the work order.
- Enter WO Header Equipment to distribute the cost of the part to the equipment on the work order header only.

Note: If the selected Part is tracked by asset, then the system clears Equipment, Equipment Org., and Related Work Order because you cannot distribute a part tracked by asset across multiple equipment.

21 Blanket Order–Line—Enter the blanket order line to associate with the part.

Note: If you select a Blanket Order–Line, the system automatically populates the Supplier, Supplier Catalog Reference, Part, Description, Part Org., Requested Qty., Price, UOM, Currency, and Buyer from the blanket order line. Part and Description are protected.

If you enter a Part and then select a Blanket Order–Line, the system overwrites the selected Part with the part from the blanket order line.

22 Buyer—Enter the buyer for the part.

23 Delivery Address—Enter the delivery address for the part.

24 Inspection—Select to indicate that the part requires inspection.

25 Warranty—Select to indicate that the part is covered under warranty.

26 Track by Asset—Select to indicate that the part is tracked by asset.

27 Expense Type—Enter the expense type for the part.

28 Commodity—Enter the commodity for the part.

29 Quotation Indicator—Select one of the following options to indicate whether a supplier quotation is required for requisitioning the part:

- Price quote not requested—Select if a quotation is not required prior to requisitioning the part.
- Request a price quote—Select if a quotation is required prior to requisitioning the part.
• **Price quote requested before PO**—Select if a quotation is preferred but not required prior to purchasing the part.

**30 Comments**—Enter comments as necessary.

**31** Click **Submit**. The system calculates the cost of the part line and populates **Part Line Total** with the cost of the total value of the line.

**Note:** To delete a part, select the part to delete, and then click **Delete Part Line**. The system deletes the record and updates the Parts list.

To manually create a part for a requisition when the part isn't listed in the supplier catalog reference, or cataloged on the **Parts** form, click **Create Part**.

To add multiple parts to a requisition, click **Select Parts**. The system opens the Select Parts popup.

To add a comment, click **Add/Edit Comments**.

To add an iProcure part, click **Add Parts (iProcure Items)**.

To update iProcure Items in the parts catalog, click **Update iProcure Items**.

To view iProcure sync errors, click **View iProcure Sync Errors**.

To select a substitute part for a part that has been prevented from reordering, click **Select Substitute Part**. The system displays the Select Substitute Link popup.

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**Manually creating parts for requisitions**

Manually create parts for requisitions when parts aren't listed in the supplier catalog reference or cataloged on the **Parts** form.

To manually create parts for requisitions:

1. Open the **Requisitions** form.
2. Select the requisition for which to create parts, and then click the **Parts** tab.
3. Click **Create Part**. The system automatically populates **Part** with a sequential Part number.
4. **Part Description**—Enter a description for the part.
5. **Part Org.**—Modify the part organization as necessary.
6. **Type**—Select the part type for the requisitioned line.
7. **Line**—Enter the line number for the part.
   **Note:** **Line** type cannot be External Repair.
8. **Requested Qty.**—Enter the requested quantity part of the part.
9. **Price**—Enter the price of the part. The system automatically populates the currency of the organization on the requisition header in the adjacent field.
10. **Requested Before**—Enter the date before which the requisitioned part must be received.
11. **Attention To**—Enter the name or department that is receiving the part.
12. **Work Order–Activity**—Enter the work order and activity for which the items are being requisitioned.

   **Note:** If a work order and activity are entered on the requisition header, the system also populates **Work Order – Activity** with the work order and activity from the requisition header and automatically
set the **Type** for the requisition line to Direct Purchase (PD). However, you can change the **Type** to Stock Purchase (PS), and the system automatically clears the **Work Order – Activity**. If the selected **Work Order – Activity** is a multiple equipment work order, the system enables **Equipment** and it is required.

### 13 Equipment
—Choose one of the following options if the work order is a multiple equipment work order:

- Enter a specific equipment to which to distribute the cost of the part.
- Enter **All Equipment** to evenly distribute the cost of the part to each equipment record on the work order.
- Enter **WO Header Equipment** to distribute the cost of the part to the equipment on the work order header only.

**Note:** If the selected **Part** is tracked by asset, then the system clears **Equipment**, **Equipment Org.**, and **Related Work Order** because you cannot distribute a part tracked by asset across multiple equipment.

### 14 Exchange Rate
—Enter the exchange rate for the part on the requisition.

### 15 Cost Code
—Enter the cost code with which to associate the cost of the requisition.

### 16 Blanket Order–Line
—Enter the blanket order line to associate with the part.

**Note:** If you select a **Blanket Order–Line**, the system automatically populates the **Supplier**, **Supplier Catalog Reference**, **Part**, **Description**, **Part Org.**, **Requested Qty.**, **Price**, **UOM**, **Currency**, and **Buyer** from the blanket order line. **Part** and **Description** are protected.

If you enter a **Part** and then select a **Blanket Order–Line**, the system overwrites the selected **Part** with the part from the blanket order line.

### 17 Buyer
—Enter the buyer for the part.

### 18 Delivery Address
—Enter the delivery address for the part.

### 19 Inspection
—Select to indicate that the part requires inspection.

### 20 Warranty
—Select to indicate that the part is covered under warranty.

### 21 Track by Asset
—Select to indicate that the part is tracked by asset.

### 22 Expense Type
—Enter the expense type for the part.

### 23 Commodity
—Enter the commodity for the part.

### 24 Quotation Indicator
—Select one of the following options to indicate whether a supplier quotation is required for requisitioning the part:

- **Price quote not requested**—Select if a quotation is not required prior to requisitioning the part.
- **Request a price quote**—Select if a quotation is required prior to requisitioning the part.
- **Price quote requested before PO**—Select if a quotation is preferred but not required prior to purchasing the part.

### 25 Comments
—Enter comments as necessary.

### 26 Click Submit. The system calculates the cost of the part line and populates **Part Line Total** with the cost of the total value of the line.

**Note:** To delete a part, select the part to delete, and then click **Delete Part Line**.
To add a comment, click Add/Edit Comments.
To add a iProcure part, click Add Parts (iProcure Items).
To update iProcure Items in the parts catalog, click Update iProcure Items.
To view iProcure sync errors, click View iProcure Sync Errors. View the errors, and then click Close.

Selecting substitute parts
Select a substitute part for a requisition.

Note: The system only displays parts that have been associated as substitutes on the Parts form. The system does not display parts with Prevent Reorders selected on the Parts form.

To select substitute parts:
1. Open the Requisitions form.
2. Select the requisition to which to add parts, and then click the Parts tab.
3. Select the part line for which to substitute the part, and then click Select Substitute Part.
4. Select the part to substitute, and then click OK. The system replaces the value for Part with the newly selected part.

Adding services to requisitions
Add services to requisitions when your organization needs to hire external labor.

Note: You can only add services to requisitions that have a status of Unfinished.

Requisition entry limits apply to adding services. Contact your system administrator if you do not have sufficient requisition entry limits.

To add services to requisitions:
1. Open the Requisitions form.
2. Select the requisition to which to add a service, and then click the Services tab.
   The system automatically populates Requested Before with the current date, Status with Unfinished, and Type with Hours from service. The system automatically populates Work Order-Activity if a work order and activity were entered on the selected requisition record.
   If the system populates Work Order-Activity, it also populates Trade, Price, Task, and Hours Requested based on information entered for the selected Work Order-Activity and associated Task.
3. Click Add Service Line.
   Note: If the requisition line is generated from an RFQ, the system populates RFQ, RFQ Org., Quotation, Quotation Org., and Quotation Line when the line is created.
If an RFQ is generated from the requisition, the system populates RFQ, RFQ Org., and RFQ Line once the RFQ line is created. When a Quotation line is awarded for an associated RFQ line, the Quotation information is populated.

4 Supplier—Enter or modify the supplier for the service if necessary. If a supplier is entered on the requisition header, the system automatically populates Supplier with the designated supplier from the header. Specifying a supplier adds more detail to the search criteria for assigning lines to requisitions.

Note: The system automatically populates Supplier Org. with the organization of the selected supplier. The system also populates Supplier Catalog Reference if a catalog reference exists for the supplier.

5 Work Order-Activity—Enter the work order and activity for the service. If Work Order - Activity is entered on the requisition header, the system automatically populates Work Order - Activity with the designated work order/activity from the header.

Note: The system can only automatically populate the requisition line with both the work order/activity on the requisition header if Hired Labor is selected for the activity on the work order. If the activity is not authorized for hired labor services, the system leaves Activity blank, and you must either create or enter a valid activity.

To create a work order and activity, click Create Work Order/Activity.

If you select or create a Work Order–Activity, the system can automatically populate a number of fields from the work order/activity depending on the data entered on the work order/activity, such as the Equipment, Trade, Task Qty. (and the unit of measure), Price (from the task record), Requested Before, Equipment Org., Department, Task, Buyer, Warranty, and Commodity. The system also automatically populates the Service Line Total with the total cost of the services on the service line. If the work order/activity is associated with a project and budget, the system populates the Project and Budget from the work order/activity.

If the selected Work Order – Activity is a multiple equipment work order, the system enables Equipment and it is required.

6 Equipment—Choose one of the following options if the work order is a multiple equipment work order:

• Enter a specific equipment to which to distribute the cost of the services.
• Enter All Equipment to evenly distribute the cost of the services to each equipment record on the work order.
• Enter WO Header Equipment to distribute the cost of the services to the equipment on the work order header only.

Note: When associating an order line with a multiple equipment work order, the system copies the purchase order line to only the parent multiple equipment work order activity. The system does not populate the purchase order line for the related work order activities.

7 Line—Modify the line number of the service on the requisition if necessary. The system automatically assigns the next incremental line number based on the setting of the INCRLINO installation parameter.

Note: You can only edit the Line number when inserting a record. After the record is saved, Line is protected.
8 Price—Enter the price of the service.

Note: If a supplier and work order/activity is associated with a trade but not a task, the system populates Price with the supplier rate for the specified Trade. If a supplier does not exist, the system populates Price with the rate specified for the trade and department.

9 Requested Before—Enter the date before which the requisitioned service must be completed.

10 Status—Select the status of the service.

11 Cost Code—Select the cost code for the service. If a Cost Code is entered on the requisition header, the system automatically populates Cost Code with the designated cost code from the header.

12 Delivery Address—Select the delivery address for the service. If a Delivery Address is entered on the requisition header, the system automatically populates Delivery Address with the designated delivery address from the header.

13 Expense Type—Select the expense type of the service.

14 Quotation Indicator—Select one of the following options to indicate whether a supplier quotation is required for requisitioning the service:

- Price quote not requested—Select if a quotation is not required prior to requisitioning the service.
- Request a price quote—Select if a quotation is required prior to requisitioning the service.
- Price quote requested before PO—Select if a quotation is preferred but not required prior to purchasing the service.

15 Type—Select one of the following options:

- Contractor hire—Select if the requisitioned service is under contract. If you select Contractor hire, you must enter a Trade. You cannot enter Work Order-Activity.

- Fixed price—Select if the requisitioned service is to be paid at a fixed price. If you select Fixed price, you must enter a Work Order-Activity. The system automatically populates Hours Requested with 1 and Price based on the rate entered for the selected Trade.

  Note: If you enter a Supplier, the system populates Price based on the supplier’s catalog rate entered for the selected Task. If you do not enter a Task, the system populates Price based on the supplier’s rate entered for the selected Trade.

- Hours from service—Select if the requisitioned service is to be paid at an hourly rate. If you select Hours from service, you must enter a Work Order-Activity.

16 Hours Requested—Enter the number of estimated hours to complete the service.

Note: If Estimated Hours have been specified for the task, the system establishes a ratio enabling you to enter Task Qty., which will then adjust the Hours Requested. This ratio is always based on the Task, never the activity. Likewise, if you enter a value for Hours Requested, then the reverse will be true, and the system will adjust the Task Qty. If there are no Estimated Hours specified for the Task, then the Task Qty. and Hours Requested are not connected. The system calculates the ratio between the Task Qty. and Hours Requested based on the following formula:

\[
\text{Hours Requested} / \text{Task Qty.} = \text{Ratio}
\]
For example, if the **Hours Requested** are 1.5 and the **Task Qty.** is 1, the system calculates the ratio between the two as follows:

\[
1.5 / 1 = 1.5
\]

If you update the **Hours Requested** to 4, then the system calculates the **Task Qty.** as follows:

\[
4 / 1.5 = 2.67
\]

Since the reverse is true if you update the **Task Qty.**, if you update **Task Qty.** to 4, then the system calculates the **Hours Requested** as follows:

\[
4 \times 1.5 = 6
\]

If you clear **Hours Requested**, the system retains the current value for **Task Qty.**

17 **Buyer**—Enter or modify the buyer of the service.

18 **Warranty**—Select if the service is covered under warranty.

19 **Commodity**—Enter or modify the commodity of the service.

20 Click **Submit**.

**Note:** To delete a service, select the service to delete, and then click **Delete Service Line**. The system deletes the record and updates the Services list. You can only delete services from requisitions that have a status of Unfinished.

To add a comment, click **Add/Edit Comments**.

### Copying requisitions

Copy requisition details to a new requisition.

To copy requisitions:

1. Create a requisition.
2. Right-click, and then select **Copy Requisition**.
3. **New Requisition**—Enter the name of the new requisition. The system automatically populates the **New Requisition** description.
4. Select the record types to copy, and then click **Submit**.

### Creating work orders and activities on the Services page

Quickly create a work order and activity on the **Services** page of the **Requisitions** form without having to open the **Work Order** form.

To create work orders and activities on the **Services** page:

1. Open the **Requisitions** form.
2. Select the requisition for which to create a work order and activity, and then click the **Services** tab.
3. Click **Create Work Order/Activity**.
4 Enter the information necessary to create the work order.
   
   **Note:** If you enter a linear equipment record, the system displays Linear Reference Details. Enter the linear equipment information.

5 Enter the information necessary to add the first activity to the work order.

6 Click **Submit**. The system populates Work Order-Activity on the **Services** page of the **Requisitions** form.

   **Note:** Click **Reset** to clear all of the fields on the form.

Manually assigning repair details for core tracked parts on requisitions

Manually assign repair details for core tracked parts on requisitions. If you did not select **Auto-Assign** on a core tracked part record, you must manually assign repair details for the repair parts on requisitions. Manually assigning repair details for parts enables you to designate the store, bin, lot, and asset information to identify the parts to repair and their location.

You can also change repair details that were created during the system’s automatic assignment process using the Repair Details popup.

To manually assign repair details for core tracked parts on requisitions:

1 Open the **Requisitions** form.
2 Select the requisition to which to assign repair details, and then click the **Parts** tab.
3 Select the part to which to manually assign repair details. The system populates the **Part Details** with the part information.

   **Note:** You can modify **Requested Qty.** for a repair part if necessary. If you make any changes to **Requested Qty.**, you can use the Repair Details popup to edit **Qty. Assigned** as necessary.

You can only assign repair parts for Approved requisition lines.

4 Click **Assign Repair Details**. The system displays the Repair Details popup. The system displays the **Part** and **Part Org.** of the selected part. **Track by Asset** is selected if the part is tracked by asset. The system automatically populates **Total Qty. to Repair** and **Total Qty. Assigned**. **Total Qty. to Repair** indicates the quantity of the part that is currently in stock for repair. The **Total Qty. Assigned** indicates the quantity of the part that is in stock for repair and has already been assigned to a repair bin location.

5 Select the store, bin, lot, and asset from which to assign a quantity of the part to repair.

6 **Qty. Assigned**—Enter the quantity of the part to assign for repair.

   **Note:** The value entered for **Qty. Assigned** cannot be greater than **Core Qty.**.

7 Click **Submit**.

   **Note:** To delete a repair part line from the Parts on a requisition, select the repair part line to delete, and then click **Delete Repair Part**.
Viewing transactions for requisitions

View return transactions for the selected requisition.

To view transactions for requisitions:

1. Open the Requisitions form.
2. Select the requisition for which to view transactions, and then click the Transactions tab.
3. View the transactions information.

Generating RFQs from requisitions

From a requisition, generate a request for quotations for parts and services.

To generate RFQs from requisitions:

1. Open the Requisitions form.
2. Select the requisition for which to request quotations, and then click the Record View tab.
3. Right-click, and then select Generate RFQ. The system automatically populates Organization, Status, and Store.
4. RFQ Description—Enter a description of the RFQ.
5. Currency—Enter the currency for the quotation.
6. Populate Suppliers—Select to have all requisition suppliers populated on the RFQ.
7. Requested By—Enter the employee requesting the quotation.
8. Requested Response Date—Enter the date by which to receive the quotation.
9. Buyer—Enter the buyer for the quotation.
10. Delivery Address—Enter the delivery address for the quotation.

11. Click Generate. The system stores RFQ, RFQ Org., and RFQ Line on the requisition line for the RFQ line created from that Requisition line. The system also updates the Requisition System to Q (Quoting), populates RFQ with the newly created RFQ number, and selects RFQ Required.

Note: If Populate Suppliers is selected when a RFQ is being generated, the supplier associated with the requisition line is added to the RFQ on the Suppliers page. If the same supplier is associated with multiple requisition lines, the supplier is added to the RFQ only once.

Approving and rejecting purchasing requisitions

View a list of requisitions awaiting approval, and then either accept or reject the requisitions.

Note: You must have sufficient status change authorizations to approve and reject requisitions, and you cannot approve requisitions that exceed your requisition approval limit.
Approving requisitions

To approve requisitions:

1. Open the Review / Approve Requisitions form.
2. Select the requisitions to approve, and then click Approve. The system removes the approved requisitions from the list, and sets the system status of the requisitions to Approved.

   Note: To select all the lines at once, check Select. To unselect all the lines at once, uncheck Select. Double-click a requisition to view its details.

Rejecting requisitions

To reject requisitions:

1. Open the Review/Approve Requisitions form.
2. Select the requisitions to reject, and then click Reject.

   Note: To select all the lines at once, check Select. To unselect all the lines at once, uncheck Select. Double-click a requisition to view its details.

3. Enter the reason for rejection.
4. Use Reason for All—Select if you are rejecting multiple requisitions and the reason for rejection applies to all of the requisitions.
5. Click OK. The removes the rejected requisitions from the list, and sets the system status of the requisitions to Rejected.

Understanding automatic purchase order generation

Users set up as buyers with the proper authorization can automatically generate purchase orders with Unfinished, Ready for printing, or Approved status (or equivalent user codes) from existing requisitions on the Generate POs form.

To grant users the authorization to generate and/or approve purchase orders from existing requisitions, you must create the appropriate status change authorizations for generation for the PORD entity on the Status Authorization form. You can also create equivalent user codes for Unfinished, Ready for printing, or Approved status to which to assign to generated purchase orders.

You must also have sufficient monetary approval limits for the purchase order line or header level for Purchase Order and/or for PO Approval on the Users form to generate and/or approve the purchase order.
The LIMITLEV installation parameter determines whether approval limits are set at the header or line level. The system administrator can set LIMITLEV for Purchase Order and/or PO Approval at either the header level or the line level on the Installation codes form.

If you attempt to create a purchase order that exceeds your monetary approval limits for the purchase order line or header level, the system does not generate the purchase order.

Note: The scenarios for automatic purchase order generation apply to both the purchase order header and lines, and they are the same whether LIMITLEV is set to the header or line level for Purchase Order Limit.

Additionally, if the ASSETASS installation parameter is set to P and any of the approved requisition lines include parts tracked By Asset that have not been associated with objects, you must create an asset for each part tracked By Asset.

When generating automatic purchase orders, the system may generate more than one purchase order. Based on the search criteria you enter on the Generate PO form, the system may return requisition lines with multiple store and/or supplier combinations. When you select Create PO, the system generates a different purchase order for each individual store/supplier combination. The following table illustrates this concept.

<table>
<thead>
<tr>
<th>Requisition Number</th>
<th>Line</th>
<th>Store</th>
<th>Supplier</th>
<th>PO to be Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000</td>
<td>1</td>
<td>Store 1</td>
<td>Supplier 1</td>
<td>10000</td>
</tr>
<tr>
<td>10000</td>
<td>2</td>
<td>Store 1</td>
<td>Supplier 1</td>
<td>10000</td>
</tr>
<tr>
<td>10001</td>
<td>1</td>
<td>Store 2</td>
<td>Supplier 1</td>
<td>10001</td>
</tr>
<tr>
<td>10002</td>
<td>1</td>
<td>Store 1</td>
<td>Supplier 2</td>
<td>10002</td>
</tr>
<tr>
<td>10002</td>
<td>2</td>
<td>Store 2</td>
<td>Supplier 2</td>
<td>10003</td>
</tr>
</tbody>
</table>

If a requisition line contains a repairable spare part to be repaired externally and there are no repair details assigned for the part via either the auto-assignment process or the Repair Details popup, the system processes external repair lines as follows:

- If PO Status is Unfinished in Purchase Order Options, the system adds the external repair part to a new or existing purchase order.
- If the status of the purchase order is Ready for Printing, the system adds the external repair part to a new purchase order.
- If the status of the purchase order is Approved, the system does not add the external repair part to either a new or existing purchase order, because a purchase order cannot be Approved without repair details.

If an external repair part line has repair details assigned, the system adds the external repair line to a new or existing purchase order when you generate the purchase order(s). When the purchase order is Approved, the Requested Qty. of the part is moved from Qty. for Repair to Qty. at Supplier on the stock record of the part, and it is also removed from the Qty. for Repair on the bin stock record of the part.
Creating a new purchase order from requisition line items

Create a new purchase order from existing approved requisition line items to quickly move the requisition to the purchasing module. Approved requisition lines can be generated using the Requisitions form.

**Note:** If the installation parameter POCURR is set to NO, the system requires that all requisition lines reference the same currency before it generates a purchase order.

Only users with the proper authorization can create purchase orders from existing requisitions with an Unfinished status or equivalent user code.

**Note:** To grant users the authorization to create purchase orders from existing requisitions with Unfinished status, you must create the appropriate status authorizations for the PORD entity on the Status Authorization form. You can also create an equivalent user code for the Unfinished status to which to assign to generated purchase orders.

You may set monetary approval limits for the purchase order line or header level for Purchase Order and/or for PO Approval on the Users form to generate and/or approve the purchase order. Purchase order limits are specified per user if you do not use multi-organization security. If you do use multi-organization security, purchase order limits are specified per user and organization. If your system administrator does not set monetary approval limits, users with proper authorization will be able to generate and/or approve purchase orders of any amount.

**Note:** The LIMITLEV installation parameter determines whether approval limits are set at the header or line level. The system administrator can set Purchase Order for generation and/or PO Approval for approval at either the header level or the line level using the LIMITLEV installation parameter on the Install Parameters form.

To create a new purchase order from requisition line items:

1. Open the Generate POs form.
2. **Organization**—Enter the organization to which the requisition belongs if you use multi-organization security.
3. **Supplier**—Enter the supplier for which purchase orders should be created.
4. **Store, Buyer, Requested By, Requisition**—Enter the store, buyer, originator, and/or requisition for which to create the purchase order.
   **Note:** To generate purchase orders for all stores, buyers, originators, and/or requisitions that begin within a specific letter, enter the letter followed by a percentage sign, e.g., you want to generate purchase orders for all of your Houston stores, so you enter ‘H%’ in Store.
5. **Create PO**—Select to create a new purchase order from the requisition lines.
   **Note:** You may also select Add to Existing PO.
6. **PO Status**—Select the status of the purchase order to be created.
7. **Originator**—Enter the originator of the purchase order to be created.
8. **Delivery Address** and **Buyer**—Enter a delivery address and/or buyer for the purchase order to be created.
9. **Print PO**—Select to print a new purchase order from the requisition lines.
10. **Click Process**.
11 Select the requisition lines to associate with the PO. The system automatically selects all of the requisition lines for which a supplier is specified. You may remove individual lines from the list by unselecting the line. The line remains outstanding, and you can assign it to a future purchase order.

Note: To select all the lines at once, check Select. To unselect all the lines at once, uncheck Select.

12 Supplier—If a supplier is not specified for a part, select a supplier for the part. Press F9 to display the supplier lookup. The system automatically populates Supplier Org.

Note: If the part does not currently exist in the supplier’s catalog, the system creates a record for the part in the supplier’s catalog.

For parts that are included in a supplier’s catalog but do not have a Gross Price (for purchases) or Repair Price (for repairs) recorded in the supplier catalog, the system updates/inserts the Gross Price or Repair Price for the part in the supplier catalog when the purchase order line is generated.

13 Click Generate. The system generates a purchase order, assigns the appropriate system status, and assigns the organization of the purchase order based on the organization of the store on the requisition.

Note: Depending on your system configuration, the system requires an electronic signature to authorize status initiations for purchase orders. The system displays the eSignature popup when assigning a status for the purchase order.

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Adding requisition line items to an existing purchase order

Add requisition line items to an existing purchase order to quickly move the requisition to the purchasing module. Requisition lines must be approved before they can be added to purchase orders.

Note: If the installation parameter POCURR is set to NO, the system requires that all requisition lines reference the same currency before it generates a purchase order.

To add requisition line items to an existing purchase order:

1 Open the Generate POs form.
2 Organization—Enter the organization to which the requisition belongs if you use multi-organization security.
3 Supplier—Enter the supplier for which purchase orders should be created.
4 Store, Buyer, Requested By, Requisition—Enter the store, buyer, originator, and/or requisition for which to create the purchase order.

Note: To generate purchase orders for all stores, buyers, originators, and/or requisitions that begin within a specific letter, enter the letter followed by a percentage sign, e.g., you want to generate purchase orders for all of your Houston stores, so you enter ‘H%’ in Store.

5 Add to Existing PO—Select to add the requisition lines to an existing purchase order.

Note: You may also select Create PO.
6 Existing PO—Enter the PO number of the PO for which to add requisition lines.
7 Print PO—Select to print a new purchase order from the requisition lines.
8 Click Process to retrieve the requisition lines.
9 Select the requisition lines to associate with the PO. The system automatically selects all of the requisition lines for which a supplier is specified. You may remove individual lines from the list by unselecting the line. Unselected lines remain outstanding, and you can assign them to a future purchase order.

Note: To select all the lines at once, check Select. To unselect all the lines at once, uncheck Select.

10 Supplier—If a supplier is not specified for a part, select a supplier for the part. Press F9 to display the supplier lookup. The system automatically populates Supplier Org.

Note: If the part does not currently exist in the supplier’s catalog, the system creates a record for the part in the supplier’s catalog.

For parts that are included in a supplier’s catalog but do not have a Gross Price (for purchases) or Repair Price (for repairs) recorded in the supplier catalog, the system updates/inserts the Gross Price or Repair Price for the part in the supplier catalog when the purchase order line is generated.

11 Click Generate.

Note: Depending on your system configuration, the system requires an electronic signature to authorize status initiations for purchase orders. The system displays the eSignature popup when assigning a status for the purchase order.

Receiving parts

Receive parts against existing purchase orders or for items purchased without a purchase order such as credit card purchases.

Receiving parts against purchase orders

Receive parts against existing purchase orders. First, create purchase order receipt headers so you can receive purchase orders to your location. Create your receipt header based on an outstanding purchase order or for a specific supplier.

Once you create a receipt header, the system allows you to retrieve outstanding PO lines on the Active Lines page. If you entered a purchase order on the receipt header, the system displays all outstanding part lines for the selected purchase order. If you entered a supplier and store on the receipt header, the system displays all outstanding part lines on all purchase orders for that supplier.

From the Active Lines page, select which parts to receive and identify bin and/or lot locations to which to receive them.
When you approve lines on a PO receipt, the system moves the lines from the Active Lines page to the Processed Lines page, changes the status of the receipt from Unfinished to Approved, and adds the received parts to stock unless otherwise indicated.

**Note:** An automatic update for requisitions and purchase orders assigns a status of Complete when all lines of the requisition or purchase order are received. If there are subsequent returns affecting the requisition or purchase order, the system opens the affected record and automatically changes the status accordingly. Four installation parameters apply to this automatic update: RQSTRECV, RQSTALLR, POSTRECV, and POSTALLR.

**Step 1: Create a non-purchase order receipt**

To create non-purchase order receipts:

1. Open the Non-PO Receipts form.
2. Click New Record.
   
   **Note:** The system automatically populates Date with the current date.
3. **Organization**—Select the organization for which to create the non-purchase order receipt if you use multi-organization security. The organization you select must be a specific organization to which you belong.
4. **Non-PO Receipt**—Enter a description of the non-PO receipt in the adjacent field. The system automatically assigns a number to the non-PO receipt after you save the record.
5. **Status**—Select the status of the non-PO receipt. The system automatically assigns an Unfinished status to the non-PO receipt, or the equivalent user code status.
6. **Supplier**—Enter the supplier from which the materials were purchased.
7. **Store**—Enter the store to which the materials were received.
8. **Reference Number**—Enter the reference number for the receipt transaction. The reference number can be a credit card approval number, a verification code, a transaction reference number, etc.
9. Click Save Record.

**Step 2: Record packing slip information for PO receipts**

Record the packing slip information for PO Receipts when the packing slip contains lines for a specific purchase order or contains lines from multiple purchase orders from the same supplier. Once the packing slip information is recorded, the system automatically populates the Active Lines page with the lines so that the lines may be received into inventory.

**Note:** If your company procedure does not use packing slips, skip the packing slip step.

To record packing slip information for PO Receipts:

1. Open the PO Receipts form.
2. Select the PO Receipt for which to record the packing slip, and then click the Packing Slip tab.
3 Click **Retrieve Lines**. The system populates the Packing Slip list with outstanding part lines based on the information you entered on the PO receipt header. The system automatically populates **Part**, **Part Description**, **Outstanding Qty. (UOP)**, and **Condition**.

4 **Receipt Qty. (UOP)**—Enter the number of items received in the unit of purchase.

5 **Receipt Qty. (UOM)**—Enter the number of the parts that were actually received.

6 **Delivery Qty. (UOD)**—Enter the number of delivery items, and then enter the unit of measure per unit of delivery.

7 **UOP per Delivery UOD**—Enter the unit of purchase for the part per the unit of delivery.

8 Click **Record Packing Slip**. The system records the packing slip lines, changes the system status of the PO Receipt header to R (Packing Slip Recorded), and creates active lines for the packing slip lines.

   **Note**: The packing slip **Receipt Qty. (UOM)** is the value recorded for **Receipt Qty. (UOM)** on the **Active Lines** page.

   To remove a packing slip line, select the line to remove, and then click **Remove Line**.

   To remove all packing slip lines, click **Remove All Lines**.

   To remove multiple packing slip lines, click **Remove Multiple Lines**. Select the lines to remove, and then click **Remove Selected Lines**.

---

**Step 3: Retrieve outstanding PO lines (skip packing slip)**

Retrieve outstanding PO lines on the **Active Lines** page after you create the PO receipt header. If you entered a purchase order on the receipt header, the system displays all outstanding part lines for the selected purchase order. If you entered a supplier and store on the receipt header, the system displays all outstanding part lines for all purchase orders for that supplier and store combination.

If you are receiving a part tracked by asset, the system displays the part in quantities of one (e.g., you receive five motors that are tracked by asset, so the system displays the motor on five separate lines).

To retrieve outstanding PO lines:

1 Open the **PO Receipts** form.

2 Select the PO receipt for which to retrieve PO lines, and then click the **Active Lines** tab.

3 Click **Retrieve Parts (Skip Packing Slip)**. The system populates the Active Lines list with outstanding part lines based on the information you entered on the PO receipt header.

   **Note**: If the purchase order line for which you are receiving parts is associated with a multiple equipment work order, then the system populates **Equipment**, **Equipment Org.**, and **Related Work Order** from the values on the purchase order line, and they are protected.

   To remove individual lines from the Active Lines list, select the line from the Active Lines list, and then click **Cancel Line**. The system cancels the record and updates the Active Lines list. The line remains outstanding and you can add it to a future PO receipt.

   To undo an individual line removal from the Active Lines list, click **Undo Cancel Line**. The system changes the status of the line to Unfinished if the line has a system status of Cancelled.
Select the part line for which to enter line details. The system populates the part information including the **Condition** from the purchase order in Active Line Details.

**Note:** If the PDRCPTTO installation parameter is set to EVENT, the system automatically selects **Direct** for each direct material part, and it is updateable. If PDRCPTTO is set to STORE, the system automatically selects **Direct**, and it is updateable.

If the part is tracked by lot, **By Lot** is selected and protected.

### 5 Repair Condition— Enter the repair condition if the part is for an external repair and condition tracked.

### 6 Verify the number of parts received for each line and/or edit the information for each part on the receipt as necessary.

### 7 Bin—Edit the bin number for the part.

**Note:** If you specified a default bin for the part in store on the part record, the system automatically populates **Bin** with the default bin.

If the part is for an external repair and tracked by condition, the system automatically populates **Bin** with the default bin for the part associated with the repair condition.

### 8 Receipt Qty. (UOM)—The system automatically populates **Receipt Qty. (UOM)** with the number of the parts that were actually received. The system populates **Receipt Qty. (UOP)** with the actual number of items received in the unit of purchase, and it is protected.

For example, if you received one case of the item, and each case contains 12 items, then the system displays 12 as the **Receipt Qty. (UOM)** and 1 as the **Receipt Qty. (UOP)**.

**Note:**

If you received fewer or more parts than you ordered, edit the received quantity. To edit **Receipt Qty. (UOM)**, select the line to edit on the Active Lines list. The system populates the line information in the Active Line Details.

If you receive only a partial order (e.g., you ordered 100 widgets and only 50 came in), receive the materials, and then save the record. When the rest of the order comes in, create a new PO receipt to close the purchase order. You cannot modify the first PO receipt.

If the part to receive is tracked by asset, the system creates a separate line for each by asset part, populates the **Receipt Qty. (UOM)** with 1, and you must enter an **Asset ID** for each part to receive.

If you are receiving or scrapping core tracked parts from an external supplier repair that were assigned from the same lot in a core bin, the system creates one line for each part on the receipt and populates **Receipt Qty. (UOM)** with the outstanding quantity of the part from the purchase order. If the external repair parts were assigned from more than one lot in a core bin, the system also creates one line for each part/lot combination on the receipt, but the system does not populate **Receipt Qty. (UOM)**.

The system automatically populates the **Qty. per UOP** with the quantity of the part per unit of purchase from the purchase order line.

For parts tracked by asset, the **Receipt Qty. (UOM)** cannot be greater than the outstanding quantity of the part on the purchase order. However, for parts that are not tracked by asset, the **Receipt Qty. (UOM)** can be greater than the outstanding quantity of the part on the purchase order if the OVERRECV installation parameter is set to YES. If OVERRECV is set to NO, the **Receipt Qty. (UOM)** cannot be greater than the outstanding quantity on the purchase order.
9 Repair Price—If the part is a core tracked part to be repaired externally by a supplier, enter the supplier’s price for repairing the part.

Note: Repair Price is only enabled if the RPPRCCAL installation parameter is set to YES and the part selected is a core tracked part from an external repair purchase order line. If the RPPRCCAL installation parameter is set to NO, Repair Price is protected regardless of whether the part is core tracked.

If a part is core tracked, the system enables Scrapped Qty., and Lot is protected.

10 Asset Type—If the part is tracked by asset, enter the asset type for the part to receive.

11 Department—Enter the department for the part to receive.

Note: For parts tracked by asset, an Asset ID and Department must be specified. The system may automatically populate these fields depending on the ASSETASS and AUTOANUM installation parameters.

If the ASSETASS installation parameter is set to P (for "Purchase Order"), assets are created for parts tracked by asset at the time you create the purchase order of the parts to receive, and the assets are already associated with the parts to receive. So, when you click Retrieve Parts, the system automatically populates Asset ID, Asset Type, Asset Org., and Department and they are protected. However, if the ASSETASS installation parameter is set to R (for "Receipt"), you must create the assets to associate with each part tracked by asset at the time of receipt, and you must enter Asset ID, Asset Org., and Department. Asset Type is also required, and the system automatically populates Asset Type with the Asset system type.

If the AUTOANUM installation parameter is set to YES, the system will automatically enter an asset number for each Asset ID when you click Approve Parts.

12 Manufacturer Lot—Enter the manufacturer lot for the part to receive.

13 Expiration Date—Enter the expiration date for the part to receive.

14 Return Qty.—Enter a return quantity for the part to create a return transaction for the part on the receipt. If you enter a Return Qty., the system enables Reason for Return. If you specify a Return Qty. and Reason for Return, the system creates an approved return transaction for the supplier for all line types (direct materials, parts tracked by asset, and/or core tracked parts) when you click Approve All Parts.

15 Lot—Enter the lot for the part to receive as necessary.

Note: If LOTNRG is set to P (generate lot numbers for each receipt) or T (only generate lot numbers for parts tracked by asset), the system does not automatically populate Lot when you receive parts, and you can either enter a lot or select an existing lot for the part. If you do not enter a lot, the system generates a lot for the part when you click Approve Parts.

If you enter a new lot, the system creates a new lot record for the entered lot, and the lot will be available for future selection in the Lot lookups.

If LOTNRG is set to "-", the system validates the lot based on the existing lots lookup. However, if the SHOWLOT installation parameter is set to N, the system does not generate any lot numbers regardless of the setting of the LOTNRG installation parameter. Lot is hidden, and the system automatically populates Lot with an asterisk (*) in the database.

If the part to receive is core tracked, Lot is protected.
16 Asset ID—If the part is tracked by asset, enter the code identifying the asset to associate with the part. The system automatically populates Asset Org.

17 Scrapped Qty.—If the part is core tracked, you can enter the quantity of the parts to scrap because they cannot be repaired.

18 Print Qty.—Enter the quantity of the label(s) to print for the part to receive.

Note: The system automatically sets the Print Qty. based on the setting of Label Printing Default on the Stores tab of the Parts form:

- If set to No Labels—Print Qty. is null.
- If set to Single Labels—Print Qty. is set to 1.
- If set to Label for Each Item—Print Qty. is equal to the Receipt Qty. (UOM), but you can modify the Print Qty. as necessary. Updating Print Qty. does not affect the Receipt Qty. (UOM).

Click Print Label(s) to print labels for the part(s) to receive, and the system will print labels based on your system configuration and the specified Print Qty.

19 After editing the part details for the part(s) on the receipt, click Submit.

20 Review the Active Lines list, and then click Approve All Parts.

Note: When you approve the receipt for external repair lines, the system moves Receipt Qty. from the Qty. at Supplier to Qty. on Hand on the stock record of the part. Scrapped Qty. is subtracted from Qty. at Supplier on the stock record, but it is not added to Qty. on Hand.

If the part is tracked by asset, the status of the associated asset is updated to Purchased/In Store. If you scrap the part tracked by asset, the status of the associated asset is updated to Withdrawn, and the status of any child assets in a hierarchy are also updated to Withdrawn.

If both a Receipt Qty. and Scrapped Qty. are entered, the system creates one transaction line of type RECV for both a receipt and the scrap transactions.

If All Equipment is selected for Equipment on a line, the system creates a header and line transaction for each Related Work Order activity associated with the multiple equipment work order. Each transaction is used to receive the appropriate number of parts for each equipment on the multiple equipment work order. The quantity for each transaction is equal to the quotient of the Receipt Qty (UOM) and the number of equipment on the multiple equipment work order. The system automatically applies any remainder of the receipt quantity that cannot be evenly distributed to the last equipment record on the Equipment page of the Work Orders form.

If a specific Equipment record is selected, then the system creates a transaction for the Related Work Order associated with the selected Equipment and activity.

If WO Header Equipment is selected for Equipment on a line, then the system creates a transaction for only the work order on the purchase order line.

When you approve the receipt for external repair lines and the part is condition tracked, the system updates Qty. at Supplier for the purchase order line part instead of the repair condition part. Qty. on Hand is updated for the repair condition part instead of the purchase order line part. In addition, if the part is tracked by asset and received, the status of the associated asset is updated to Purchased/In Store. If you scrap the part tracked by asset, the status of the associated asset is updated to Withdrawn.
Viewing processed lines for PO receipts

View processed lines for PO receipts to see purchase order lines that have already been approved on a PO receipt. Once you approve a line on a PO receipt, the line cannot be used with any other PO receipt. The system automatically moves lines from the Active Lines page to the Processed Lines page when they are approved.

To view processed lines for PO receipts:

1. Open the PO Receipts form.
2. Select the PO receipt for which to view processed lines, and then click the Processed Lines tab.
3. View the processed lines information.

The system displays the following information for each processed line in the Processed Lines list:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Line number of the part on the receipt</td>
</tr>
<tr>
<td>Part</td>
<td>Code of the received part</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the Part</td>
</tr>
<tr>
<td>Part Org.</td>
<td>Organization of the Part</td>
</tr>
<tr>
<td>Type</td>
<td>Type of part, e.g., Stock Items, Direct Materials, and External Repairs</td>
</tr>
<tr>
<td>Received Qty.</td>
<td>Quantity of the part that was received</td>
</tr>
<tr>
<td>Scrapped Qty.</td>
<td>If the part is a repairable spare part, the system displays the quantity of the part that was scrapped because it could not be repaired.</td>
</tr>
<tr>
<td>Repair Price</td>
<td>If the part is a repairable spare part, the system displays the price of repairing the part.</td>
</tr>
<tr>
<td>Originator</td>
<td>The User ID of the user from whom the stock transaction originated</td>
</tr>
<tr>
<td>Bin</td>
<td>Bin into which the part was received for the receipt transaction</td>
</tr>
<tr>
<td>Lot</td>
<td>Lot of the received part</td>
</tr>
<tr>
<td>Asset ID</td>
<td>Identification number of the associated asset</td>
</tr>
<tr>
<td>Asset Type</td>
<td>Type of the associated asset</td>
</tr>
<tr>
<td>Asset Description</td>
<td>Description of the associated asset</td>
</tr>
<tr>
<td>Asset Org.</td>
<td>Organization of the associated asset</td>
</tr>
<tr>
<td>Department</td>
<td>Department of the part/asset</td>
</tr>
<tr>
<td>Serial Number</td>
<td>Serial number of the part/asset</td>
</tr>
<tr>
<td>Manufacturer Lot</td>
<td>Lot of the part assigned by the manufacturer</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>The date the price for the part expires</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Purchase order for which the part was received</td>
</tr>
<tr>
<td>Purchase Order Org.</td>
<td>Organization of the Purchase Order</td>
</tr>
<tr>
<td>Receipt Trans.</td>
<td>System-generated number identifying the part receipt</td>
</tr>
<tr>
<td>Return Trans.</td>
<td>System-generated number identifying the part return</td>
</tr>
<tr>
<td>Return Qty.</td>
<td>Number of the part that was returned for the receipt</td>
</tr>
<tr>
<td>Reason for Return</td>
<td>Explanation of why the part was returned that was entered during the receipt/return transaction</td>
</tr>
<tr>
<td>Work Order</td>
<td>Work order for which the part was purchased/received</td>
</tr>
<tr>
<td>Activity</td>
<td>Activity on the work order for which the part was purchased/received</td>
</tr>
<tr>
<td>Direct</td>
<td>Indicates that the received part was for a purchase order line type of Direct Materials</td>
</tr>
<tr>
<td>Equipment</td>
<td>The equipment for which the part was purchased/received if the associated Work Order and activity is a multiple equipment work order</td>
</tr>
<tr>
<td>Equipment Org.</td>
<td>Organization of the Equipment if the associated Work Order and activity is a multiple equipment work order</td>
</tr>
<tr>
<td>Related Work Order</td>
<td>Number identifying the system-generated MEC work order created for the Equipment if the associated Work Order and activity is a multiple equipment work order</td>
</tr>
<tr>
<td>Direct</td>
<td>Indicates that the received part was for a purchase order line type of Direct Materials</td>
</tr>
<tr>
<td>By Lot</td>
<td>Indicates that the part received is tracked by lot</td>
</tr>
<tr>
<td>Supplier Catalog Reference</td>
<td>Number of the part in the supplier’s part catalog</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Employee code of the employee to whom the work order is assigned</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the employee to whom the work order is assigned</td>
</tr>
</tbody>
</table>
Creating non-purchase order receipts

Create non-purchase order receipts to receive parts into store without a purchase order to facilitate credit card purchases or any other type of purchase made without using a purchase order.

After creating a non-purchase order receipt, you can update the receipt status as necessary based on your status change authorization privileges. Status change authorizations are set up for the TRAN entity on the Status Authorizations form. However, the system enables and/or protects the fields available for update based on the status from which you are updating the receipt.

Step 1: Create a non-purchase order receipt

To create non-purchase order receipts:

1. Open the Non-PO Receipts form.
2. Click New Record.
   - Note: The system automatically populates Date with the current date.
3. Organization—Select the organization for which to create the non-purchase order receipt if you use multi-organization security. The organization you select must be a specific organization to which you belong.
4. Non-PO Receipt—Enter a description of the non-PO receipt in the adjacent field. The system automatically assigns a number to the non-PO receipt after you save the record.
5. Status—Select the status of the non-PO receipt. The system automatically assigns an Unfinished status to the non-PO receipt, or the equivalent user code status.
6. Supplier—Enter the supplier from which the materials were purchased.
7. Store—Enter the store to which the materials were received.
8. Reference Number—Enter the reference number for the receipt transaction. The reference number can be a credit card approval number, a verification code, a transaction reference number, etc.
9. Click Save Record.

Step 2: Add parts to a non-purchase order receipt

To add parts to a non-purchase order receipt:

1. Open the Non-PO Receipts form.
2. Select the non-PO receipt for which to add parts, and then click the Parts tab.
3. Click Add Part.
   - Note: To automatically create a new part record while adding the part to the Parts list, click Create Part. The system inserts a new Part Details record, creates a part record, assigns the part record a part number beginning with ‘N’, and protects the Part field from update.
4. Part—Enter the part to add to the non-PO receipt. The system automatically populates the part description and Part Org., and Bin based on the information you entered on the Stores and Stock pages of the Parts form.
Materials management

**Note:** The system automatically selects **Track by Asset** for parts tracked by asset, and you must specify an **Asset ID**, **Asset Type**, and **Asset Org.**

5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

6 **Receipt Qty.**—Enter the quantity of the part that you received.

**Note:** For parts tracked by asset, the system only receives the part in quantities of 1. The system automatically assigns 1 as the **Receipt Qty.** You must manually add lines for each asset to receive if you want to receive more than one asset.

7 **Bin**—Enter the bin where the part should be stocked.

8 **Lot**—Enter the lot for the part.

9 **Expiration Date**—Enter the expiration date for the lot.

10 **Department**—Enter the department of the asset if the part is tracked by asset.

11 **Manufacturer Lot**—Enter the manufacturer lot for the part.

12 **Print Qty.**—Enter the quantity of the label(s) to print.

**Note:** The system automatically sets the **Print Qty.** based on the setting of **Label Printing Default** on the **Stores** tab of the **Part** form:

- If set to **No Labels**—**Print Qty.** is null.
- If set to **Single Labels**—**Print Qty.** is set to 1.
- If set to **Label for Each Item**—**Print Qty.** is equal to the **Receipt Qty.**, but you can modify the **Print Qty.** as necessary. Updating **Print Qty.** does not affect the **Receipt Qty.**

13 Click **Print Label(s)** to print labels for the part(s) to receive, and the system will print labels based on your system configuration and the specified **Print Qty.**

14 **Price**—Enter the price of the part.

15 **Asset ID**—Enter the asset ID number for the part if the part is tracked by asset.

16 **Asset Type**—Enter the asset type for the part if the part is tracked by asset.

17 **Asset Org.**—Enter the organization for the asset for the part if the part is tracked by asset.

**Note:** If the ASSETASS installation parameter is set to P, a by asset part must already be associated with an asset with a status of Awaiting Purchase to receive the part. If you want to receive a part tracked by asset, you must enter an **Asset ID**, but all other asset-related fields are protected. After selecting an **Asset ID**, the system automatically populates **Asset Type**, **Asset Org.**, **Description**, **Department**, and **Serial Number** (if applicable).

If the ASSETASS installation parameter is set to R, you can create assets when you are receiving a part tracked by asset. You can either associate an existing asset with the part, or you can manually enter asset information to create new assets. If you select an existing asset as the Asset ID, the system automatically populates the **Asset Type**, **Asset Org.**, **Department**, and **Serial Number** (if applicable) from the asset record. If you choose to manually enter the asset information, you must enter an **Asset ID**, **Asset Type**, **Asset Org.**, and **Description** for each asset. The system automatically populates **Asset Type** with type A (or the system equivalent); however, you can update the **Asset Type** as necessary.

If the AUTOANUM installation parameter is set to YES and the ASSETASS installation parameter is set to R, the system automatically generates asset numbers for parts tracked by asset, but you
must enter an Asset Type, Asset Org., and Description for each asset. You can also update Asset ID if necessary. The system automatically populates Asset Type with type A (or the system equivalent); however, you can update the Asset Type as necessary. When you save the record, the system saves the asset information on the receipt; however, the system does not actually create any assets until the receipt Status is Approved. Upon approval of the receipt, the system creates all of the new assets using the part descriptions.

18 Serial Number—Enter the serial number for the part if the part is tracked by asset.

19 Click Submit.

   Note: To remove a part line, select the part line to remove, and then click Remove Part.

Issuing and returning parts

Issue parts from stores to work orders, equipment, or projects. Return unused parts and parts needing repair to stores.

Issuing parts to work orders, equipment, or projects

Issue parts to stores to work orders, equipment, or projects.

   Note: If you have selected FIFO or LIFO as your pricing method, the system calculates the transaction price of issues to work orders, equipment, or projects using the R5FIFO table, rather than retrieving the base price from the R5PARTS or R5STOCK table.

To issue parts to work orders, equipment, or projects:

1 Open the Issue/Return Parts form. The system automatically populates Transaction Type with Issue to enable issue functionality.

2 Store—Enter the store from which to issue parts. The system automatically populates Date with the current system date. If a default store is defined for the current user, the system automatically populates Store with the user’s default store.

3 Choose one of the following options:

   • Issue to a work order—Enter the Work Order—Activity. The system automatically populates Equipment, Equipment Org., Project—Budget, Cost Code, and Department from the work order, as well as the Material List or Pick Ticket if they have been associated with the Activity.

   • Issue to a piece of equipment—Enter the Equipment. The system automatically populates Cost Code and Department.

   Note: If the selected Equipment is associated with a multiple equipment work order, then the system also populates Equipment Org. and Related Work Order.

   If you select All Equipment for Equipment and you are issuing a By Asset part, then the system clears the Transaction Details.
• Issue to a project—Enter the Project–Budget and Department.

4 Issue To—Enter the code of the employee to whom to make the issue.

5 Reference Number—Enter a reference number for the issue. The reference number is simply an internal reference number that is not used by the system for any validation.

6 Material List—Enter the material list from which to issue. If a material list is already attached with the selected work order/activity, the system automatically populates Material List in the Issue From / Return To section and enables the Material List hyperlink in the Transaction Details section. You can modify Material List as necessary when the parts on the material list have been added to the Transaction Details list.

7 Pick Ticket—Enter the pick ticket from which to issue. If a pick ticket is already attached with the selected work order/activity, the system automatically populates Pick Ticket in the Issue From / Return To section and enables the Pick Ticket hyperlink in the Transaction Details section. You can modify Pick Ticket as necessary when the parts on the pick ticket have been added to the Transaction Details list.

Note: Pick tickets are not available for issuing parts to a project/budget. If the selected WO–Activity associated with the Pick Ticket is a multiple equipment work order, then the system automatically populates Equipment with WO Header Equipment.

8 Department—Enter the department of the store, work order/activity, project/budget, or equipment. The system automatically populates Department if you have selected a work order/activity or piece of equipment.

9 Date—Modify the date on which to make the issue. The system automatically populates Date with the current date and time.

10 Choose one of the following options:
   • If the parts have been included on a material list—Click Material List.
   • If the parts have been included on a pick ticket—Click Pick Ticket.
   • If purchased parts were delivered and are ready for distribution—Click Held Items.
   • If stock parts are reserved for this work order—Click Reserved Items.

Note: If none of these options apply, enter the part information manually. See the following step.

11 Part—Enter the part to issue. The system displays the available quantity, the bin location, and the lot number. Change the bin location and lot number as necessary. The system populates Available Qty. with the sum of the quantities of the part in all the bins in the selected Store minus any quantity of the part that is currently allocated to any work orders.

If the part to issue is tracked by asset, the system automatically selects Track by Asset and enters 1 as the Transaction Qty., and you must enter a value for Asset ID for the part. The system populates Available Qty. with the total quantity of the part that is currently available.

The system automatically populates Available Qty. UOM and Transaction Qty. UOM.

Note: You cannot enter a Transaction Qty. greater than 1 when issuing parts tracked by asset. If you want to issue multiple quantities of a part tracked by asset, you must add the part tracked by asset to the Transaction Details list on individual lines with a Transaction Qty. of 1 until you have reached the number of the part tracked by asset that you wish to issue for the transaction. Track by Asset is hidden by default.
If the part to issue is tracked as part of a kit, the system creates a single transaction line for the kit.

12 Bin—Select the bin from which to issue the part. The system enters the default bin for the part if applicable.

**Note:** When you select a Bin, the system updates the **Available Qty**. with the quantity of the part in the selected Bin minus any quantity of the part that is currently allocated to any work orders from that Bin.

13 Condition—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

14 Lot—Select the lot from which to issue the part. The system automatically populates **Expiration Date**, **Serial Number**, and **Manufacturer Lot**.

15 Transaction Qty.—Enter the number of parts to issue. The system automatically enters the **Available Qty**. of the part if applicable.

16 Print Qty.—Enter the quantity of the label(s) to print. The system automatically sets the **Print Qty**. based on the setting of **Label Printing Default** on the **Stores** tab of the **Part** form:

- **If set to No Labels**—Print Qty. is null.
- **If set to Single Labels**—Print Qty. is set to 1.
- **If set to Label for Each Item**—Print Qty. is equal to the **Receipt Qty.**, but you can modify the **Print Qty.** as necessary. Updating Print Qty. does not affect the **Receipt Qty.**

17 Print Core Return Qty.—Enter the quantity of the core return label(s) to print.

18 Failed Qty.—Enter the quantity of the part that failed.

**Note:** The system does not allow part failures on an Issue for parts tracked by asset.

19 Date Failed—Enter the date the part failed.

20 Problem Code—Enter the code of the problem for the failed part.

21 Failure Code—Enter the reason that the part failed.

22 Action Code—Enter the action taken to correct the problem.

23 Cause Code—Enter the problem cause code, i.e., the root cause of the failure.

24 Failure Notes—Enter comments about the failure.

25 Click **Add to List**.

**Note:** The Transaction Details list acts as a buffer to temporarily store the parts to issue without actually issuing them until the transaction is submitted. You can add/remove parts for the issue as necessary before submitting the transaction and saving the information to the database. Click **Add Part** to add additional parts to the issue. To remove a part from the Transaction Details list, select the part record to remove from the issue, and then click **Remove from List**.

Additionally, you can also update information in the Issue To / Return From and/or Issue From / Return To sections for the transaction as necessary before adding records to the Transaction Details list.

26 Click **Submit Transaction**. The system issues the part(s) and creates a stock transaction of type **I** for the issuing store with a negative quantity for the issue.

**Note:** To print labels for the issue transaction, click **Print Label(s)**.
To print labels for the core return transaction, click **Print Core Return Label(s)**. To record a stockout for a part, select the part, and then click **Record Stockouts**.

## Issuing parts to multiple equipment work orders

Issue parts from stores to multiple equipment work orders.

To issue parts to multiple equipment work orders:

1. Open the **Issue/Return Parts** form.
2. **Store**—Enter the store from which to issue the part(s). If a default store is defined for the current user, the system automatically populates **Store** with the user’s default store. The system automatically populates **Date** with the current system date and **Transaction Type** with **Issue** to enable issue functionality.
3. **WO–Activity**—Enter the multiple equipment work order/activity to which to issue the part. The system automatically populates **Equipment** with **All Equipment**. The system also populates **Related Work Order, Cost Code, and Department** from the selected **WO–Activity**. **Equipment** is required and **Related Work Order** is protected.
   - If the selected multiple equipment **WO–Activity** is associated with a project/budget, then the system automatically populates **Project–Budget**, and it is protected.
   - If the selected **WO–Activity** is associated with a pick ticket, the system automatically populates **Pick Ticket** from the associated **WO–Activity** or **Equipment** record.
   
   **Note**: The system does not display work orders in the **WO–Activity** lookup for which the value specified for the ISSDAYS installation parameter has been exceeded.

   If the selected multiple equipment **WO–Activity** has reserved parts and not all parts have been issued, then the system enables the **Reserved Items** hyperlink. Click **Reserved Items** to retrieve the relevant part information to the Transaction Details list.

   If the selected multiple equipment **WO–Activity** or any of its related work orders have direct material parts that have been purchased and **All Equipment** is selected for **Equipment**, then the system enables the **Held Items** hyperlink. Click **Held Items** to retrieve the relevant part information to the Transaction Details list.

4. **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:
   - Enter a specific equipment to which to issue the **Transaction Qty**.
   - Enter **All Equipment** to evenly to issue the **Transaction Qty** to each equipment record on the work order.
   - Enter **WO Header Equipment** to issue the **Transaction Qty** to the equipment on the work order header only.

   **Note**: The system automatically applies any remainder of the **Transaction Qty** that could not be distributed evenly to the last equipment record on the **Equipment** page of the **Work Orders** form.
If you select All Equipment and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to distribute the cost of the issue against all equipment or against only open related work orders regardless of whether the related work orders are Open or Completed (or their user-status equivalents).

5 Cost Code—Enter the cost code for which to issue the part. The system populates the description in the adjacent field.

6 Issue To—Enter the code of the employee to whom to make the issue.

7 Reference Number—Enter a reference number for the issue. The reference number is simply an internal reference number that is not used by the system for any validation.

8 Material List—Enter the material list from which to issue parts for the multiple equipment work order.

9 Pick Ticket—Enter the pick ticket from which to issue parts for the multiple equipment work order. The system automatically selects WO Header Equipment for Equipment and enables the Pick Ticket hyperlink in the Transaction Details.

Note: If a pick ticket is associated with the selected multiple equipment WO – Activity, then you cannot select another value for Equipment other than WO Header Equipment. Pick tickets cannot be used to issue parts across all equipment on a multiple equipment work order or to a specific equipment on a work order.

10 Department—Modify the department of the work order.

11 Date—Modify the date on which to make the issue.

12 Part—Enter the part to issue. The system displays the available quantity, the bin location, and the lot number. Change the bin location and lot number as necessary. The system populates Available Qty, with the sum of the quantities of the part in all the bins in the selected Store minus any quantity of the part that is currently allocated to any work orders. Asset ID and Tool Hours are protected.

Note: You cannot distribute issues of parts tracked by asset to All Equipment on a multiple equipment work order. If All Equipment is selected for Equipment, then the lookup for Part displays only unique parts issued to the work order header or any of the related work orders.

If you are issuing a part tracked by asset to a specific Equipment on a multiple equipment work order, the lookup for Part displays only the parts issued to the individual equipment record on the Related Work Order.

13 Bin—Enter the bin from which to issue the part. The system enters the default bin for the part if applicable. When you select a Bin, the system updates the Available Qty, with the quantity of the part in the selected Bin minus any quantity of the part that is currently allocated to any work orders from that Bin.

The system automatically populates Available Qty. UOM and Transaction Qty. UOM.

14 Lot—Enter the lot from which to issue the part. The system automatically populates Expiration Date, Serial Number, and Manufacturer Lot.

15 Transaction Qty.—Enter the quantity of the part to issue. If the part to issue is tracked by asset, the system automatically selects Track by Asset and enters 1 as the Transaction Qty., and you must enter a value for Asset ID for the part. The system populates Available Qty. with the total quantity of the part that is currently available.
Note: You cannot enter a **Transaction Qty.** greater than 1 when issuing parts tracked by asset. If you want to issue multiple quantities of a part tracked by asset, you must add the part tracked by asset to the Transaction Details list on individual lines with a **Transaction Qty.** of 1 until you have reached the number of the part tracked by asset that you wish to issue for the transaction. **Track by Asset** is hidden by default.

When issuing parts to a multiple equipment work order for which All Equipment is selected, parts tracked by asset are not available for issue, and the system splits the **Transaction Qty.** equally among all the related work orders.

16 **Print Qty.**—Enter the quantity of the label(s) to print.

The system automatically sets the **Print Qty.** based on the setting of **Label Printing Default** on the **Stores** tab of the **Parts** form:

- **If set to No Labels**—**Print Qty.** is null.
- **If set to Single Labels**—**Print Qty.** is set to 1.
- **If set to Label for Each Item**—**Print Qty.** is equal to the **Receipt Qty.**, but you can modify the **Print Qty.** as necessary. Updating **Print Qty.** does not affect the **Receipt Qty.**

17 Click **Add to List.**

**Note:** The Transaction Details list acts as a buffer to temporarily store the parts to issue without actually issuing them until the transaction is submitted. You can add/remove parts for the issue as necessary before submitting the transaction and saving the information to the database. Click **Add Part** to add additional parts to the issue.

To remove a part, select the part record to remove, and then click **Remove from List.** The system updates the Transaction Details list.

18 Click **Submit Transaction.** The system issues the part(s) and creates a stock transaction of type I for the issuing store with a negative quantity for the issue.

**Note:** To print labels for the issue transaction, click **Print Label(s).**

If the AUTOPART installation parameter is set to AUTO, then the system determines whether each part is associated with the equipment’s Parts Associated list. If any of the parts are not associated with the equipment’s Parts Associated list, the system updates the list with the parts and assigns the **Transaction Qty.** as the part’s associated **Quantity.** If a part is already associated but the **Transaction Qty.** is greater than the existing associated **Quantity,** then the system updates the associated **Quantity** with the **Transaction Qty.** The system does not update the existing associated **Quantity** if the **Transaction Qty.** is not greater.

Adding parts on a material list to an issue

Add parts on a material list to an issue on the Issue/Return Parts form. If you enter a **Material List** on an issue header, the system enables the **Material List** hyperlink in the Transaction Details enabling you to add the parts on the material list to the issue. You can select which parts to add, and you can also modify the **Bin, Lot,** and **Transaction Qty.** for the part(s) to add to the issue.
You can issue parts on a defined material list to a **WO – Activity** multiple times. However, you can only issue parts on a temporary material list created by selecting parts for a work order to the work order for which the temporary list is created.

If the material list includes parts that are associated with equipment codes or equipment categories, the system only adds part records to the Transaction Details list that are associated with the equipment on the header or the equipment category or parts that are not associated with any equipment or equipment category.

**Example**

You create MATERIAL LIST 1 with the following parts:

<table>
<thead>
<tr>
<th>Line Number</th>
<th>Part</th>
<th>Quantity</th>
<th>Equipment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PART1</td>
<td>1</td>
<td>EQUIP1</td>
</tr>
<tr>
<td>2</td>
<td>PART2</td>
<td>1</td>
<td>EQUIP2</td>
</tr>
<tr>
<td>3</td>
<td>PART3</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>PART4</td>
<td>2</td>
<td>EQUIP4</td>
</tr>
<tr>
<td>5</td>
<td>PART4</td>
<td>3</td>
<td>EQUIP1</td>
</tr>
<tr>
<td>6</td>
<td>PART4</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>PART5</td>
<td>1</td>
<td>CATEGORY1</td>
</tr>
<tr>
<td>8</td>
<td>PART6</td>
<td>1</td>
<td>CATEGORY2</td>
</tr>
</tbody>
</table>

You then create a work order WO1 for EQUIP1 of CATEGORY1. After creating the WO1, you open the Issue/Return Parts form to issue parts to WO1. You enter MATERIAL LIST 1 as the **Material List** on the issue header and then click the **Material List** hyperlink, and then the system retrieves the following parts and quantities:

<table>
<thead>
<tr>
<th>Part</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>PART1</td>
<td>1</td>
</tr>
<tr>
<td>PART3</td>
<td>1</td>
</tr>
<tr>
<td>PART3</td>
<td>1</td>
</tr>
<tr>
<td>PART4</td>
<td>3</td>
</tr>
<tr>
<td>PART4</td>
<td>4</td>
</tr>
<tr>
<td>PART5</td>
<td>1</td>
</tr>
</tbody>
</table>

**Note:** If a part on a material list is tracked by asset, then each by asset part on the material list is entered on a separate line regardless of the **Available Qty.** and the system automatically enters 1 as the **Transaction Qty.**

To add parts on a material list to an issue:

1. Open the **Issue/Return Parts** form.
2. **Material List**—Enter the material list from which to issue parts. The system enables the Material List hyperlink in the Transaction Details.
3 Enter a **WO–Activity**, **Project–Budget**, and/or **Equipment** as necessary.
4 **Department**—Enter the department against which to issue the parts from the material list.
5 **Date**—Modify the date as necessary.
6 Click **Material List**. The system populates the Transaction Details list with the Parts on the material list and protects all the information on the issue header.
7 Select the part on the material list for which to update the transaction details. The system populates the Transaction Details.
6 The system automatically populates **Bin**, **Lot**, and **Transaction Qty**. The **Transaction Qty** is equal to the **Quantity** specified for the part on the material list. **Part, Part Description, Asset ID, Available Qty, Available Qty. UOM, Transaction Qty, UOM, and Return for Repair** are protected.
8 **Bin**—Modify the bin from which to issue the parts on the material list if necessary.
9 **Lot**—Modify the lot from which to issue the parts on the material list if necessary.
10 **Transaction Qty**.—Update the number of parts to issue from the pick ticket as necessary.
11 Click **Add to List**. The system updates the Transaction Details list.

**Note:** The Transaction Details list acts as a buffer to temporarily store the parts to issue without actually issuing them until the transaction is submitted. You can add/remove parts for the issue before submitting the transaction and saving the information to the database.

To remove a part from the pick ticket from the Transaction Details list, select the part record to remove from the issue, and then click **Remove from List**.

12 Update additional parts from the material list as necessary.

**Adding parts on a pick ticket to an issue/return**

Add parts on a pick ticket to an issue/return on the **Issue/Return Parts** form. To issue parts from a pick ticket, the status of the pick ticket must be **Approved**, and a pick ticket can only be used for the work order or equipment for which it was created.

If you enter a **Pick Ticket** on an issue header, the system enables the **Pick Ticket** hyperlink in the Transaction Details for adding the parts on the pick ticket to the issue. You can select which parts to add, and you can also modify the **Bin, Lot, and Transaction Qty**. for the part(s) to add to the issue.

The setting of the PICKONCE installation parameter determines whether you can issue parts on a pick ticket for multiple transactions for the same **WO – Activity**. If PICKONCE is set to YES, the system will not automatically enter a **Pick Ticket** for the **WO – Activity** in the issue header if an issue transaction for the pick ticket already exists for the **WO – Activity**; and you cannot select the pick ticket from the **Pick Ticket** lookup. If PICKONCE is set to NO, then you can reuse the same pick ticket for more than one transaction for a **WO - Activity**, but the system will only retrieve parts to the issue transaction that were not previously issued.

**Note:** You can only issue more parts than the specified **Required Qty.** for the part on a pick ticket if there is a sufficient **Available Qty.** for the part.

Once a pick ticket has been fully issued and fully returned, the system sets the status of the pick ticket to **Closed** and the pick ticket is no longer available for use, even if PICKONCE is set to NO.
If a part on a pick ticket is tracked by asset, then each by asset part on the pick ticket is entered on a separate line regardless of the Available Qty, and the system automatically enters 1 as the Transaction Qty.

To add parts from a pick ticket to an issue:

1. Open the Issue/Return Parts form.
2. Pick Ticket—Enter the pick ticket from which to issue parts. The system enables the Pick Ticket hyperlink in the Transaction Details.
3. Click Pick Ticket. The system populates the Transaction Details list with the Parts on the pick ticket and protects all the information on the issue header.
4. Select the part on the pick ticket for which to update the transaction details. The system populates the Transaction Details.
   - The system automatically populates Bin, Lot, and Transaction Qty. The Transaction Qty. is equal to the Required Qty. specified for the part on the pick ticket.
   - The system automatically populates Part, Part Description, Asset ID, Available Qty, Transaction Qty. UOM, and Available Qty. UOM; they are protected.
5. Bin—Modify the bin from which to issue the parts on the pick ticket if necessary.
6. Lot—Modify the lot from which to issue the parts on the pick ticket if necessary.
7. Transaction Qty.—Modify the number of parts to issue from the pick ticket as necessary.
8. Click Add to List. The system updates the Transaction Details list.
   - Note: The Transaction Details list acts as a buffer to temporarily store the parts to issue without actually issuing them until the transaction is submitted. You can add/remove parts for the issue before submitting the transaction and saving the information to the database.
   - To remove a part from the pick ticket from the Transaction Details list, select the part record to remove from the issue, and then click Remove from List.
9. Update additional parts from the pick ticket as necessary.

Returning parts from work orders, equipment, or projects

Return unused parts issued to work orders, equipment, or projects to stores.

Note: If you have selected FIFO or LIFO as your pricing method, the system calculates the transaction price of returns from work orders, equipment, or projects using the R5FIFO table, rather than retrieving the base price from the R5PARTS or R5STOCK table. See "Understanding time-based inventory valuation (LIFO/FIFO)" on page 180.

To return parts from work orders, equipment, or projects:

1. Open the Issue/Return Parts form.
2. Transaction Type—Select Return to enable return functionality.
3. Store—Enter the store from which to return the parts. The system automatically populates Date with the current system date. If a default store is defined for the current user, the system automatically populates Store with the user’s default store.
4 Choose one of the following options:

- **Return from a work order**—Enter the Work Order-Activity. The system automatically populates the Equipment, Project-Budget, Cost Code, and Department from the work order, as well as the Material List or Pick Ticket if they have been associated with the Activity.

  **Note:** The system will only display work orders in the WO-Activity lookup for which the value specified for the RTNDAYS installation parameter has been exceeded.

  If selected WO-Activity is a multiple equipment work order, then the system also populates Related Work Order and it is protected.

- **Return from a piece of equipment**—Enter the Equipment. The system automatically populates Description, Department, and Cost Code from the equipment record. If selected Equipment is associated with a pick ticket, the system automatically populates Pick Ticket from the associated Equipment record.

  **Note:** If the selected Equipment is associated with a multiple equipment work order, then the system automatically populates Equipment Org. and Related Work Order. See "Returning parts from multiple equipment work orders" on page 262.

  If you select All Equipment for Equipment and you are issuing a By Asset part, then the system clears the Transaction Details.

- **Return from a project**—Select the Project-Budget and Department.

5 **Reference Number**—Enter a reference number for the return.

6 **Material List**—Enter the material list from which to return.

7 **Pick Ticket**—Enter the pick ticket if a pick ticket is associated with the return. If you are returning parts from a work order or piece of equipment that is associated with a pick ticket and the PICKONCE installation parameter is set to YES, then the system does not display the associated pick ticket in the Pick Ticket lookup.

  If you are returning parts from a work order or piece of equipment that is associated with a pick ticket and the PICKONCE installation parameter is set to NO, the system enables you to select the associated pick ticket from the Pick Ticket lookup. However, once you have selected a value for Pick Ticket, the system only displays parts issued for the pick ticket in the Part lookup, and you can only return the parts issued from the pick ticket.

  **Note:** If there are no parts on the selected pick ticket, or if no parts on the pick ticket are held in store, the system displays an error message when you click Pick Ticket hyperlink.

  If the work order associated with the selected Pick Ticket is a multiple equipment work order, then the system automatically populates Equipment with the WO Header Equipment.

8 **Department**—Enter the department from which to return parts. The system automatically populates Department if you have selected a work order/activity or piece of equipment.

9 **Date**—Modify the date on which to make the return. The system automatically populates Date with the current date and time.

10 **Part**—Enter the part to return. The system displays parts in the Part lookup based on the setting of the RTNANY installation parameter and whether you are returning to a work order, a piece of equipment, or a project.
Note: If the Work Order selected for the return is a multiple equipment work order, the system displays only parts issued to the header work order or any of the related MEC work orders in the list of values, because Equipment is automatically populated with All Equipment. When you select the part to return, the system automatically populates Transaction Qty., Bin, and Lot. The Transaction Qty. is the difference of the total quantity issued to all equipment on the work order and the quantity already returned from all equipment on the work order. You can modify the Transaction Qty., Bin, and Lot as necessary and add additional equipment to the Parts list.

If the part to return is tracked by asset, the system automatically selects Track By Asset, enters 1 as the Transaction Qty., and you must enter a value for Asset ID for the part. The system automatically populates Available Qty. of 1 until you have reached the number of the part tracked by asset that you wish to return for the transaction.

If the part is a core tracked part, the system enables Core Return. If you select Core Return, the system populates Bin with the Default Core Bin. If the Default Core Bin overwrites a different bin, then the system clears the Lot, Expiration Date, and Manufacturer Lot.

If you unselect Core Return, the system populates Bin with the Default Bin. If the Default Bin overwrites a different bin, then the system clears the Lot, Expiration Date, and Manufacturer Lot.

The system automatically populates Transaction Qty., UOM.

Note: If you submit a return transaction for a core tracked part with Core Return unselected, the system processes the return as a normal return.

11 Bin—Enter the bin to which to return the part.

12 Return Condition—Enter the return part condition.

13 Lot—Enter the lot to which to return the part. The system automatically populates Bin and Lot with the bin and lot numbers associated with the original issue transaction for the part. You can change the bin location and lot number as necessary, and then click Add to List.

14 Transaction Qty.—Enter the number of parts to return. The system automatically populates Transaction Qty. with the original issue quantity of the part. If you have already returned a partial quantity of the part from the original issue, the system populates Transaction Qty. with the original quantity of the part issued minus the quantity for the part that has already been returned.

Note: Transaction Qty. can be limited based on the setting of the RTNANY installation parameter. If RTNANY is set to YES, you can 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 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 can only return the quantity of the part that was originally issued to that entity to the same store. 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.

If you select a work order on the header, the system displays only the parts that were previously issued to the work order in the Part lookup. When you select a part, the system automatically calculates the Transaction Qty. based on the difference of the quantity of the parts issued and the quantity of the part that has already been returned.

15 Print Qty.—Enter the quantity of the label(s) to print.
The system automatically sets Print Qty. based on the setting of Label Printing Default on the Stores tab of the Parts form:

- If set to No Labels—Print Qty. is null.
- If set to Single Labels—Print Qty. is set to 1.
- If set to Label for Each Item—Print Qty. is equal to the Receipt Qty., but you can modify the Print Qty. as necessary. Updating Print Qty. does not affect the Receipt Qty.

16 Click Add to List. The system adds the record to the Transaction Details list.

**Note:** The Transaction Details list acts as a buffer to temporarily store the parts to return without actually returning them until the transaction is submitted. You can add/remove parts for the return as necessary before submitting the transaction and saving the information to the database. Click Add Part to add additional parts to the return. To remove a part from the Transaction Details list, select the part to remove from the return, and then click Remove from List.

Additionally, you can also update information in the Issue To/Return From and/or Issue From/Return To sections for the transaction as necessary before adding records to the Transaction Details list.

17 Click Submit Transaction. The system returns the part(s) and creates a stock transaction of type I for the return store with a positive quantity for the return. When you submit a return transaction for a core tracked part with Core Return selected, the system adds the transaction quantity to the repair quantity of the part held in bin stock. The returned parts are added to Core Qty. on the Repair Details tab of the Parts form rather than Qty. on Hand on the Stores tab of the Parts form.

If the part is core tracked and is also tracked by asset, the asset status is changed to To Be Repaired, and the system also updates the status of all dependent children and grandchildren of the asset if the part tracked by asset is the parent in an asset hierarchy.

**Note:** If the returned part is a LIFO/FIFO part, the system determines the price for the return based on the original issue transaction. See "Understanding time-based inventory valuation (LIFO/FIFO)" on page 180. LIFO/FIFO pricing does not assign a LIFO/FIFO price to a core tracked part returned for repair. The transaction price for the return will be the Core Value of the part.

To print labels for the return transaction, click Print Label(s).

If you are creating a return for a multiple equipment work order and the RTNANY installation parameter is set to NO and All Equipment is selected for Equipment, you can only return a part that was previously issued and for which there is a sufficient quantity issued to the equipment.

### Returning parts from multiple equipment work orders

Return unused parts from multiple equipment work orders.

To return parts from multiple equipment work orders:

1. Open the Issue/Return Parts form.
2. Store—Enter the store from which to return the part(s). If a default store is defined for the current user, the system automatically populates Store with the user’s default store. The system automatically
populates Date with the current system date and Transaction Type with Issue to enable issue functionality.

3 Transaction Type—Select Return to enable return functionality.

4 WO–Activity—Enter the multiple equipment work order/activity to which to return the part. The system automatically populates Equipment with All Equipment. The system also populates Related Work Order, Cost Code, and Department from the work order/activity. Equipment is required and Related Work Order is protected.

If the selected multiple equipment WO–Activity is associated with a project/budget, then the system automatically populates Project–Budget, and it is protected.

If the selected WO–Activity is associated with a pick ticket, the system automatically populates Pick Ticket from the associated WO–Activity or Equipment record.

Note: The system does not display work orders in the WO–Activity lookup for which the value specified for the RTNDAYS installation parameter has been exceeded.

5 Equipment—Choose one of the following options if the work order is a multiple equipment work order:

• Enter a specific equipment to which to distribute the Transaction Qty.
• Enter All Equipment to evenly distribute the Transaction Qty to each equipment record on the work order.
• Enter WO Header Equipment to distribute the Transaction Qty to the equipment on the work order header only.

Note: The system automatically applies any remainder of the return quantity to the last equipment record on the Equipment page of the Work Orders form.

If you select All Equipment and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to distribute the cost of the return against only open related work orders or against all equipment, regardless of whether the related work orders are Open or Completed (or their user-status equivalents).

6 Reference Number—Enter a reference number for the return.

7 Material List—Enter the material list from which to return.

8 Pick Ticket—Enter the pick ticket if a pick ticket is associated with the WO – Activity and Equipment. Because the WO–Activity is a multiple equipment work order, the system automatically selects WO Header Equipment for Equipment. If the PICKONCE installation parameter is set to YES, then the system does not display the associated pick ticket in the Pick Ticket lookup. If PICKONCE installation parameter is set to NO, the system enables you to select the associated pick ticket from the Pick Ticket lookup. However, once you select a value for Pick Ticket, the system only displays parts issued for the pick ticket in the Part lookup, and you can only return the parts issued from the pick ticket.

9 Department—Enter the department from which to return parts.

10 Date—Modify the date on which to make the return if necessary.

11 Part—Enter the part to return. The system displays parts in the Part lookup based on the setting of the RTNANY installation parameter and whether you are returning to a work order, a piece of equipment, or a project.
Note: Because the selected WO – Activity is a multiple equipment work order, Equipment is automatically populated with All Equipment, and the system displays only parts issued to the work order header or any of the related MEC work orders in the Part lookup. When you select the part to return, the system automatically populates Transaction Qty., Bin, and Lot. The Transaction Qty. is the difference of the total quantity issued to all equipment on the work order and the quantity already returned from all equipment on the work order. You can modify the Transaction Qty., Bin, and Lot as necessary and add additional equipment to the Parts list.

If the part to return is tracked by asset, the system automatically selects Track By Asset, enters 1 as the Transaction Qty., and you must enter a value for Asset ID for the part. The system populates Available Qty. with the total quantity of the part that is currently available.

The system automatically populates Transaction Qty. UOM.

Note: You cannot enter a Transaction Qty. greater than 1 when returning parts tracked by asset. If you want to return multiple quantities of a part tracked by asset, you must add the part tracked by asset to the Transaction Details list on individual lines with a Transaction Qty. of 1 until you have reached the number of the part tracked by asset that you wish to return for the transaction.

When returning parts to a multiple equipment work order for which All Equipment is selected, parts tracked by asset are not available for return, and the system splits the Transaction Qty. equally among all the related work orders.

If you submit a return transaction for a repairable spare part with Return for Repair unselected, the system processes the return as a normal return.

If the Part is designated as a Tool, then the system enables Tool Hours.

12 Bin—Modify the bin to which to return the part if necessary.

13 Lot—Modify the lot to which to return the part if necessary. The system automatically populates Bin and Lot with the bin and lot numbers associated with the original issue transaction for the part.

14 Transaction Qty.—Enter the number of parts to return.

The system automatically populates Transaction Qty. with the original issue quantity of the part. If you have already returned a partial quantity of the part from the original issue, the system populates Transaction Qty. with the original quantity of the part issued minus the quantity of the part that has already been returned.

Note: Transaction Qty. can be limited based on the setting of the RTNANY installation parameter. For returns from multiple equipment work orders, if RTNANY installation parameter is set to Yes and All Equipment is selected for Equipment, then the system evenly distributes the return quantity to all equipment records on the work order.

If RTNANY installation parameter is set to No and All Equipment is selected for Equipment, you can only return a part that was previously issued and for which there is a sufficient quantity issued to the equipment.

15 Tool Hours—If the part you are returning is identified as a tool, enter the number of hours the tool was in use. The system applies the Tool Hours to the equipment on the multiple equipment work order based on the value entered for Equipment.

16 Print Qty.—Enter the quantity of the label(s) to print.

The system automatically sets the Print Qty. based on the setting of Label Printing Default on the Stores tab of the Parts form:

- If set to No Labels—Print Qty. is null.
• If set to Single Labels—Print Qty. is set to 1.
• If set to Label for Each Item—Print Qty. is equal to the Receipt Qty., but you can modify the
  Print Qty. as necessary. Updating Print Qty. does not affect the Receipt Qty.

17 Click Add to List.

Note: The Transaction Details list acts as a buffer to temporarily store the parts to return without
actually returning them until the transaction is submitted. You can add/remove parts for the return
before submitting the transaction and saving the information to the database. Click Add Part to add
additional parts to the return.
To remove a part, select the part to remove, and then click Remove from List.
Additionally, you can also update information in the Issue To / Return From and/or Issue From /
Return To sections for the transaction as necessary before adding records to the Transaction Details
list.

18 Click Submit Transaction. The system returns the part(s), and creates a stock transaction of type
I for the return store with a positive quantity for the return.

Note: To print labels for the return transaction, click Print Label(s).

Issuing parts from a stock record of a part

Issue parts from a stock record of a part on the Stock page of the Parts form using the Issue Part
popup.

Note: If you have selected FIFO or LIFO as your pricing method, the system calculates the transaction
price of issues using the R5FIFO table, rather than retrieving the base price from the R5PARTS or
R5STOCK table.

To issue parts from a stock record of a part:

1 Open the Parts form.
2 Select the part to issue, and then click the Stock tab.
3 Select the store, bin, and lot from which to issue the part, and then click Issue Part.

Note: If the part selected to issue is a core tracked part and the RRISSWAR installation parameter
is set to Yes, the system displays a message indicating that the part is a core tracked part and that
a part may also need to be returned for repair.

4 Work Order–Activity, Project–Budget, Equipment—Enter the work order/activity, project/budget,
or equipment against which to issue parts.

Note: You must select a valid combination for Work Order–Activity/Equipment or for Work
Order–Activity/Project–Budget to submit the issue; or you can select to make the issue to an
individual piece of Equipment or an individual Project–Budget.

5 Department—Enter the department from which to issue parts.
6 Issue To—Enter the code of the employee for which to make the issue.
7 **Issue Qty.**—Enter the number of parts to issue. If the part to issue is tracked by asset, the system automatically populates **Issue Qty.** with 1 and it is protected. You must enter the asset by which the part is tracked for **Asset ID.** You cannot modify the **Issue Qty.** when issuing a part tracked by asset from a stock record.

8 **Click Submit.**

### Returning parts from a stock record of a part

Return parts from a stock record of a part on the **Stock** page of the **Parts** form using the Return Part popup.

**Note:** If you have selected FIFO or LIFO as your pricing method, the system calculates the transaction price of returns using the **R5FIFO** table, rather than retrieving the base price from the **R5PARTS** or **R5STOCK** table.

To return parts from a stock record of a part:

1 **Open the Parts form.**
2 **Select the part to return, and then click the Stock tab.**
3 **Select the store, bin, and lot to which to return the part, and then click Return Part.**
4 **Return Condition**—Enter the return part condition.
5 **Work Order–Activity, Project–Budget, Equipment**—Enter the work order/activity, project/budget, or equipment against which to return parts.
   **Note:** You must select a valid combination for **Work Order–Activity/Equipment** or for **Work Order–Activity/Project–Budget** to submit the return; or you can select to make the return to an individual piece of **Equipment** or an individual **Project–Budget.**
6 **Department**—Enter the department from which to return parts.
7 **Return Qty.**—Enter the number of parts to return. If the part to return is tracked by asset, the system automatically populates the **Return Qty.** with 1 and it is protected. You must enter the asset by which the part is tracked for **Asset ID.** You cannot modify the **Return Qty.** when returning a part tracked by asset from a stock record.
8 **Click Submit.**

### Returning parts to a supplier

Return damaged or incorrect parts to a supplier.

**Note:**
Before you can return parts, receive them using the **PO Receipts** form and assign them a status of Approved/Complete.
The system does not allow you to return goods received via the Non-PO Receipts form because you have no purchase order number or requisition as a reference. To return such items, you need to make an arrangement between your company and your supplier.

Once satisfied with the contents of the return, change the Status on the Record View page of the return to Ready for Printing and then Approved. You must save the record after each change of status to commit the status change. The system does not update the inventory records until the return has been approved.

### Step 1: Create a supplier return header

To create a supplier return header:

1. Open the Supplier Returns form.
2. Click New Record. The system automatically populates Status and Return From.
3. **Organization**—Enter the organization to which the supplier return belongs if you use multi-organization security.
4. **Supplier Return**—Enter a description of the supplier return in the adjacent field. The system assigns a supplier return number after you save the record.
5. **Purchase Order**—Enter the purchase order number of the return. The system automatically populates Supplier, Supplier Org., and Store.
6. **Return From**—Choose one of the following:
   - **Store**—Select to return the parts from a store. The system selects Store by default.
     - **Note:** If you are returning parts from a store, then all received part lines are available for return. If a part is related to a purchase order line associated with a multiple equipment work order, then the system populates Equipment, Equipment Org., and Related Work Order, and they are protected.
   - **Work Order**—Select to return the parts from a work order. If you choose Work Order, the system removes Store and displays Work Order.
     - **Note:** If you are returning parts from a work order and the work order is a multiple equipment work order, then the system automatically populates the return with all of the part lines from the purchase order that were received directly to the work order.
7. **Store**—If you selected Store for Return From, update the store from which to return the materials if necessary. If you update Store, the system clears Purchase Order.
8. **Work Order**—If you selected Work Order for Return From, enter the work order from which to return materials.
   - **Note:** If the selected Work Order is a multiple equipment work order, the system populates Equipment, Equipment Org., and Related Work Order from the Purchase Order line. If the work order is not a multiple equipment work order, then the system populates Equipment and Equipment Org. from the work order.
   - The system does not display MEC work orders in the Work Order lookup.
Also, the system does not allow you to specify the manner in which the return is distributed to the work order equipment. The system determines the cost distribution method for the work order costs based on the value specified for Equipment on the purchase order line.

9 Class—Enter the class of the return. The classes shown belong to the TRAN entity. The system automatically populates Class Org.

10 Reference Number—Enter a reference number for the issue. The reference number can be a return authorization number, a verification code, a transaction reference number, etc.

11 Click Save Record.

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Step 2: Add parts to a supplier return

To add parts to a supplier return:

1 Open the Supplier Returns form.

2 Select the supplier return for which to add parts, and then click the Parts tab.

3 Click Retrieve Parts. The system populates the Parts list with part lines that have been received against the purchase order entered on the Record View page.

   Note: You can also click Add Part to add a single part to the supplier return rather than retrieving all the lines that have been received to a purchase order. Adding a single part to a supplier return is helpful in return situations for which you may have had a purchase order with a large number of items against which you only need to return a few parts.

   For externally repaired parts to be returned from a purchase order and store, the system retrieves part lines received against the purchase order and store on the header. Available Qty. is calculated as the number of parts received for this purchase order that are in the selected store and are not for repair. If the part is also tracked by asset, the system only retrieves the part that match the specified Asset ID. If the part was scrapped at the time at which it was received, the part cannot be returned.

   For parts to be returned from a work order, the system retrieves only direct material parts that have been received directly to the work order against the purchase order on the header.

4 Select the part to be returned from the Parts list. The system populates the part information in the Part Details section. The system automatically populates Return Qty. with the quantity of the part received against the purchase order and available in a specific bin and lot for return, Order Qty. with the original quantity of the part ordered, Available Qty. with the number of parts in stock in a specific bin and lot, and Price with the price at which the part was received. The system selects Direct if the part has been received to a work order and Track by Asset if the part is tracked by asset.

5 Return Qty.—Enter the quantity of the part to be returned.

   Note: If you are returning a part tracked by asset, the system displays the part in the Parts list in quantities of one (e.g., you received five motors that are tracked by asset, so the system displays the motor on five separate lines). The system automatically populates Return Qty. with one if you are returning a part tracked by asset, and the system also protects the field from update.

6 Bin and Lot—Enter the bin and lot from which to return the part.
7 **Reason for Return**—Enter the reason for returning the part.

8 **Asset ID**—Enter the asset ID for the part tracked by asset. If the selected part is tracked by asset, the system automatically populates Bin, Lot, Department, Asset Type, Asset Org., and Serial Number from the equipment record.

9 Click **Submit**.

   *Note: To remove a part, select the part to remove, and then click **Remove Part**.*

### Defining part condition templates

Define part condition templates when your organization reuses parts and needs to track the parts by their condition. Part condition templates define which conditions you can use to track parts. You can track parts throughout their life cycle. For example, the part condition can be new, used, rebuilt less than five times, or rebuilt more than five times.

When creating parts, Tracked by Condition must be selected. When a part is tracked by condition, the system creates a child record for each condition that is added to the part condition template.

To define part condition templates:

1 Open the **Part Condition Templates** form.

2 Click **New Record**.

3 **Part Condition Template**—Enter a unique code identifying the part condition template, and then enter a description in the adjacent field.

4 **Organization**—Enter the organization of the part condition template.

5 **Suffix Separator**—Enter a unique suffix separator code for the part condition template. The suffix separator is used in the child part code. For example, if the parent part code is TIMBEAR12, the suffix separator is a dash (-), and the condition suffix code is an A, the child part code would be TIMBEAR12-A.

6 Out of Service—Select this checkbox if you do not want the part condition template to appear in the lookups.

7 Click **Save Record**.

### Adding conditions to part condition templates

Add conditions after defining part condition template details. Multiple conditions can be added to part condition templates.

To add conditions to part condition templates:

1 Open the **Part Condition Templates** form.

2 Select the part condition template for which to add conditions, and then click the **Conditions** tab.

3 Click **Add Condition**.
4 **Condition**—Enter a unique code identifying the condition, and then enter a description in the adjacent field.

5 **Suffix Code**—Enter a unique suffix code for the condition. The suffix code is used in the child part code. For example, if the parent part code is BEARINGAXL, the suffix separator is a dash (-), and the condition suffix code is an A, the child part code would be BEARINGAXL-A.

6 **Return to Store Condition List**—Enter the return to store condition list for the part.

7 **Return to Store Condition Default**—Enter the return to store condition default for the part.

8 **Core Return Condition List**—Enter the core return condition list for the part.

9 **Core Return Condition Default**—Enter the core return condition default for the part.

10 **Receive Repairs Condition List**—Enter the receive repairs condition list for the part.

11 **Receive Repairs Condition Default**—Enter the receive repairs condition default for the part.

12 **Prevent Reorders**—Select this checkbox to prevent the part from being reordered.

13 **Prevent Issues**—Select this checkbox to prevent the part from being issued.

14 Click Submit.

### Changing conditions for parts

Modify conditions for parts when it is determined that the part condition in the system does not match the actual physical condition of the part. For example, use the **Change Part Condition** popup if the actual physical condition of the part on hand is poor or fair, but the condition in the system is good.

To change conditions for parts:

1 Open the **Parts** form.
2 Select the part for which to change the condition, and then click the **Stock** tab.
3 Select the stock record for which to change the condition, and then click **Change Part Condition**. The system automatically populates **Part**, **Part Org.**, **Condition**, **Qty. on Hand**, and **Asset ID**.
4 **New Condition**—Enter the new condition for the part.
5 **Change Qty.**—Enter the number of parts the change will affect.

   **Note:** When changing the condition for **Tracked by Asset** parts, the system will automatically update **Change Qty.** to 1. The only valid change quantity is 1.

6 Click Submit.

### Defining kit template parts

Define a combination of parts and quantities of those parts to create a kit.

To define kit templates:

1 Open the **Parts** form.
2 Select the part kit for which the kit template will be defined, and then click the Kit Template tab.

   Note: Part must be Track as Kit on the Parts form to add to the kit template.

3 Click Add Part.

4 Part—Enter the part to add to the kit. The system automatically populates Organization and the part description.

5 Quantity—Enter the quantity of the part to add to the kit. When a kit is built from this template, the system will require this quantity of the part specified to build the kit. The system automatically populates the quantity UOM.

6 Condition—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate Condition.

7 Notes—Enter any notes regarding the part or kit.

8 Click Submit.

Building kits

Build a kit from a stock of parts within a store using a pre-defined kit template.

To build a parts kit:

1 Open the Build Kits form.

2 Store—Enter the store from which to pull the parts and build the kit. The system automatically populates the store description in the adjacent field.

3 Session ID—Enter the session ID if this was a previously saved session.

4 Kit Part—Enter the part that identifies the kit to be built. The system automatically populates the kit part description, kit part organization, Condition, and Max Kits Available based on the parts required and the availability of stock in all bins in the store.

   Note: This part must be designated as a kit part on the Parts form.

5 Kit Lot Description—Enter a description of the kit lot where the part is stored. The system automatically populates Kit Lot Description based on the value of Organization Option KITLDESC, if defined.

6 Kit Bin—Enter the bin into which the newly built kit will be stored.

7 Number of Kits to Build—Enter the number of kits to build.

   Note: If any of the parts defined in the kit template are Track by Asset parts, Number of Kits to Build must be set to 1.

8 Kit Lot Expiration Date—Enter the expiration date of the kit lot.

9 Click Retrieve Parts. The system creates a Session ID if this is a new session. The system populates the Parts list with relevant parts.

10 Pulled—Select to pull parts to satisfy quantity required to build the kit.

   Note: The system defaults the value of Pulled to selected or unselected based on the value in the Organization Option KITPPULD.
11 **Part Bin**—Enter the bin that contains the part. The part will be pulled from this bin.  
   **Note:** Click F9 to invoke the BIN list of values.

12 **Part Lot**—Enter the lot that contains the part from which to pull the part.  
   **Note:** Click F9 to invoke the LOT list of values.

13 **Asset ID**—Enter the asset ID if the part is **Track as Asset**.  
   **Note:** Click F9 to invoke the Asset list of values.

14 **Issue Qty.**—Enter the quantity of the part to issue to build the kit.  
15 Click **Build Kit**. The system assigns a unique kit lot number.

### Breaking up kits

Return parts allocated to a kit. Once the parts or kit is received, inspect the component parts and return the kit to stock or return the parts to stock and/or repair and account for usage.

To break up kits:

1 Open the Breakup Kit form.  
2 **Store**—Enter the store to which to return the kit part to stock.  
3 **Kit Part**—Enter the kit part to be broken up.  
4 **Kit Lot**—Enter the specific kit to which to return the kit part. The system automatically populates the kit lot description, **Kit Lot Expiration Date**, and **Condition**.  
5 **Work Order - Activity**—Enter the work order and activity to which the kit lot was last issued. The system automatically populates the work order description.  
6 **Default Full Qty. to Qty. to Store**—Select to default the full quantity of parts retrieved to the quantity to issue back to the store (**Qty. to Store**).  
7 **Default Full Qty. to Qty. Used**—Select to default the full quantity of parts retrieved to the quantity used or consumed (**Qty. Used**).  
8 Click **Retrieve Parts**. The system retrieves the component part(s) contained in the kit specified and populates the Parts list.  
9 Select the part, and then specify this information:
   
   **Qty. Used**  
   Enter the quantity of the part consumed.
   
   **Qty. to Store**  
   Enter the quantity of the part to reissue to the store.
   
   **Store Bin**  
   Enter the store bin to which to return the part.  
   **Note:** Click F9 to invoke the Bin list of values.
Qty. to Repair
Enter the quantity of the part to be repaired.

Repair Bin
Enter the repair bin to which to return the parts for repair.

Note: Click F9 to invoke the Repair Bin list of values.

10 Click Breakup Kit. The system dismantles the kit and returns the parts to inventory into the designated areas. A transaction line of type Issue is created for each parts line. The system deletes the kit lot.

11 Click Print Restock List to print a list of parts retrieved and returned after the kit was broken up. See “Print kit restock list” on page 663.

Creating store groups

A store group is a group of stores that share the same transfer fees. Create store groups to determine if transfer fees apply for transferring parts between stores in situations where shipping fees may or may not apply.

To create store groups:

1 Open the Store Groups form.
2 Click New Record.
3 Store Group—Enter a unique name identifying the store group, and then enter a description in the adjacent field.
4 Class—Enter the class to which the store group belongs. The system automatically populates Class Org.
5 Out of Service—Select to indicate the store group is no longer in service.
6 Click Save Record.

Defining transfer fees for store groups

Define the percentage to charge for a part transfer between two stores. The transfer fee is accessed when a part is transferred using the Store-to-Store Issues, Store-to-Store Receipts, and Quick Store-to-Store-Transfer forms.

The fee is a percentage of the base price of the part, e.g., for a part that with a base price of $100 and a % of Base Price of 10 (%), the system accesses a $10 transfer fee to transfer the part between stores.

You may enter a transfer fee for stores that belong to the same store group.

To define transfer fees for store groups:
1. Open the Store Groups form.
2. Select the store group for which to define transfer fees, and then click the Transfer Fees tab.
3. Click Add Transfer Fee. The system automatically populates From Store Group.
4. To Store Group—Enter the store group to which to transfer the part.
5. Transaction Class—Enter the class of the transaction. The system automatically populates Transaction Class Org.
6. % of Base Price—Enter the charge percentage.
7. Click Submit.

Note: To delete a transfer fee, select the transfer fee to delete, and then click Delete Transfer Fee.

Creating store-to-store requisitions

Create store-to-store requisitions to transfer stock parts from one store to another, including stores within different organizations. A store-to-store requisition consists of the requisition header and requisition lines. Create the requisition header first, and then add part lines.

A typical store-to-store requisition goes through a number of status changes during the lifecycle of the requisition. User status change authorizations are established on the Status Authorizations form. See the following list for a description of store-to-store requisition statuses:

- **Unfinished**—The status of the store-to-store requisition at creation. The status of the store-to-store requisition header must remain Unfinished until lines are added to the requisition.
- **Request Approval**—Lines have been added to the store-to-store requisition, and it is ready for approval.
- **Approved**—The store-to-store requisition is approved and ready for fulfillment. Upon approval, all fields on the store-to-store requisition are protected, except Status, and all of the lines that are not Cancelled or Rejected are set to Approved.
  
  Note: You cannot approve a requisition if any store-to-store issues have been made against the requisition and the parts are still in-transit (issued but not yet received).

- **Cancelled**—The entire store-to-store requisition is cancelled.
- **Rejected**—The store-to-store requisition is rejected. The system protects all fields on the requisition, and you must enter a Reject Reason for the requisition.

Note: You can also change the status of individual store-to-store requisition lines.

Creating store-to-store requisition headers

Create store-to-store requisition headers to specify information related to the entire requisition.
The status of the requisition header indicates the progress of the requisition through its cycle. You may change the status of the requisition based on your status authorization and requisition approval limits. You can only delete requisitions with a status of **Unfinished**.

**Note:** Requisition approval limits can be set at the header or the line level depending on the setting of the LIMITLEV installation parameter.

The system enforces several business rules that prohibit changing the status of a requisition header from **Unfinished** to any status other than **Cancelled** before adding any lines to the requisition. Additionally, the system enables or protects certain fields based on the requisition status. The system also populates fields on the requisition header with values from the requisition lines.

The system assigns a requisition number.

To create store-to-store requisition headers:

1. Open the **Store-to-Store Requisitions** form.
2. Click **New Record**.
3. **To Organization**—Enter the organization to which to send the parts on the store-to-store requisition. The organization you enter must be a specific organization to which you belong.
4. **Requisition**—Enter a description of the requisition in the adjacent field. The system automatically enters a default requisition description based on the setting of the REQDESC installation parameter. The system assigns a requisition number after you save the record.
5. **Status**—Select the status of the requisition.
6. **From Store**—Enter the store from which to issue the materials on the requisition.
7. **To Store**—Enter the store to which to issue the materials on the requisition.
8. **Requested By**—Enter the employee requesting the items on the requisition.
   
   **Note:** The system automatically populates **Entered By** with the login ID of the user entering the requisition. If the user assigned for **Entered By** has a corresponding employee record, the system will automatically populate **Requested By** with the employee code of the user.

9. **Delivery Address**—Enter the address to which to deliver the items.
10. **Class**—Enter the class of the requisition. The classes shown belong to the REQ entity.
    
    **Note:** The system automatically populates **Date Requested** with the system date.

11. **Cost Code**—Enter the cost code with which to associate the cost of the requisition.
12. **Reject Reason**—Enter an explanation of the reason that the requisition is being rejected if necessary. **Reject Reason** is protected when the status of the requisition is **Unfinished** or **Cancelled**. However, the system enables **Reject Reason** and it becomes required if you change the status of the requisition to **Rejected**.
    
    **Note:** The system automatically selects **Printed** when this requisition is printed.

13. **Default Approver**—Enter the name of the person who will approve the requisition.
    
    **Note:** The system automatically populates **Approved By** with the employee code identifying the person who approves the requisition and **Date Approved** with the system date when the requisition **Status** is Approved.
The system displays the total number of the lines containing parts on the requisition in **Requisition Lines** and populates **Total Req. Value** with the total cost of the items on the requisition in the default currency of the **Organization**.

14 Click **Save Record**.

### Adding parts to store-to-store requisitions

Add the requested parts to the requisition after creating the requisition header.

You may change the status of the requisition line based on your status authorization and requisition approval limits. You can only delete a requisition line if the status of the requisition header is **Unfinished**.

**Note:** Requisition approval limits can be set at the header or the line level depending on the setting of the LIMITLEV installation parameter.

The system enforces several business rules that prohibit changing the status of a requisition header from **Unfinished** to any other status but **Cancelled** before adding any lines to the requisition. However, if the status of the requisition header is set to **Cancelled**, all the lines on the requisition are also cancelled. The system enables or protects certain fields based on the requisition status. The system also populates fields on the requisition header with certain values from the requisition lines.

To add parts to store-to-store requisitions:

1. Open the **Store-to-Store Requisitions** form.
2. Select the requisition to which to add parts, and then click the **Parts** tab. The system automatically populates **Requested Before** with the current system date. The system automatically populates **Delivery Address, Cost Code**, from the requisition header.
3. Click **Add Part**.
4. **Part**—Enter the part to add to the requisition. The system automatically populates the part description, **Part Org., Price, UOM, Buyer, Commodity, Tax Code**, and **Expense Type**.
   
The system populates **Line** with the next incremental line number of the part on the requisition.
   
   If the part is tracked by asset, the system automatically selects **Track by Asset**.

   If the **Part** is a core tracked part, the system enables **Core Qty.** You can either enter a value for **Quantity** or **Core Qty.**, but not both. When you enter a value for either **Quantity** or **Core Qty.**, the system protects the other field. The system populates **Price** with the **Core Value** of the part (not the **Repair Price**). The origin of the **Core Value** price is determined by the setting of the PRICELEV installation parameter.

5. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6. **Line**—Enter the line number for the part on the requisition line. The system automatically assigns the next incremental number to the line based on the setting of the INCRLINO installation parameter.
7. **Status**—Enter the status of the requisition line.

  **Note:** You can update the status of a requisition line at any time unless the status of the header is set to **Rejected** or **Cancelled**.
If the requisition contains more than one line, changing the status of a line does not affect the status of the header. However, if the requisition contains only one line, and you change the status of the line, then the system sets the status of the header to the status of the line.

You cannot update any field on the requisition line other than Status if the status of the line is anything other than Unfinished.

8 Quantity—Enter the requested quantity of the part.

9 Requested Before—Enter the date by which you are requesting to receive the part.

10 Exchange Rate—Modify the exchange rate for the part if necessary. The system automatically populates Exchange Rate with the exchange rate specified on the Exchange Rate tab of the Currency form.

Note: If the EXRUPDT installation parameter is set to YES and you modify the exchange rate, the system recalculates the header value based on the updated exchange rate.

11 Buyer—Enter the employee code identifying the buyer of the part.

12 Delivery Address—Enter the address to which to deliver the item.

13 Cost Code—Enter the cost code with which to associate the cost of the requisition.

Note: If applicable, the system automatically populates Tax Code and Receipt Qty, for the part. The system populates Price with the base price of the part in the From Store.

If no Cost Code is selected for the line and a Cost Code is either added or updated on the header, then the system updates the Cost Code on the line with the Cost Code of the header. Updating the Cost Code on a requisition line does not affect the header.

14 Expense Type—Select the expense type for the requisitioned line.

15 Commodity—Enter the commodity code for the requisitioned line.

Note: The system displays the total cost of the item on the requisition in Part Line Total. The Part Line Total is the product of the Requested Qty, and the Price.

Core Qty, is protected unless the selected part is a core tracked part to be issued for repair or reconditioning. If the part is core tracked, you can select and unselect Core Qty, as necessary. If Core Qty, is selected, the Price of the part is the Core Value of the part on the part record rather than the Base Price.

16 Click Submit.

Creating store-to-store issues

Create store-to-store issues to create electronic records of the issue of stock part transfers from one store to another, including stores within different organizations. You can create a store-to-store requisition before creating a store-to-store issue.

The Store-to-Store Issues form enables you to create and manage transactions to transfer parts (stock parts, repairable spare parts, and parts tracked by asset) between stores, including stores within different organizations.
Note: You can create multiple issues for the same store-to-store requisition as necessary.

After creating and approving the store-to-store issue transaction, the issuing store then physically issues the requested parts to the receiving store, in which the parts must be received.

Note: The Store-to-Store Receipts form enables you to create and manage transactions to receive parts, repairable spare parts, and parts tracked by asset from other stores, including stores within different organizations.

Creating store-to-store issue headers

Create store-to-store issue headers to specify information related to the entire issue transaction. The status of the issue header indicates the progress of the issue transaction through its cycle.

The system assigns a store-to-store issue number.

To create a store-to-store issue header:

1. Open the Store-to-Store Issues form.
2. Click New Record. The system automatically populates Date Issued with the current system date and time.
3. From Organization—Enter the organization from which to send the parts for the issue. The organization you enter must be a specific organization to which you belong.
4. Store-to-Store Issue—Enter a description of the store-to-store issue in the adjacent field. The system automatically enters a default store-to-store issue description based on the setting of the TRANDESC installation parameter. The system also assigns a store-to-store issue number after you save the record.
5. Status—Select the status of the issue. The system automatically assigns a Status of Unfinished. Changing the status of a store-to-store issue may affect additional system checks and field changes as follows:
   - Unfinished—While the store-to-store issue has an Unfinished status, most of the fields on the header are editable. However, when you save the issue with Unfinished status, the system protects the From Organization and From Store. The issue must maintain Unfinished status until lines are added to the issue on the Parts tab.
   - Cancelled—Change the status of the issue to Cancelled to cancel the issue and all of the part lines. The system protects all fields on the issue when you change the status to Cancelled.
   - Ready for Printing—Change the status of the issue to Ready for Printing after adding the parts to issue on the Parts tab. When the status of the issue is Ready for Printing, only Status, Description, Class, and Reference Number are editable.
   - Approved—The system populates Approved By and Date Issued with the User ID of the approver and the date and time that the store-to-store issue Status is set to Approved, moves parts in-transit, and changes the status of any asset(s).
6. Requisition—Enter the store-to-store requisition for which to issue the parts. If you select a Requisition, the system automatically populates From Store, To Store, and To Organization.
7. From Store—Enter the store from which to issue the part.
8 **To Store**—Enter the store to which to issue the part. The system automatically populates **To Organization**.

9 **Reference Number**—Enter a reference number for the store-to-store issue transaction.

10 **Class**—Enter the class of the requisition. The classes shown belong to the TRAN entity.

11 Click **Save Record**.

---

### Adding parts to store-to-store issues

Add parts to store-to-store issues to designate the parts to issue from one store to another.

**To add parts to store-to-store issues:**

1 Open the **Store-to-Store Issues** form.

2 Select the issue to which to add parts, and then click the **Parts** tab.

3 Click **Add Part**.

4 **Part**—Enter the part to add to the store-to-store issue. The system automatically populates the part description, **Part Org.**, and **Track by Asset**. The system populates **On Hand Qty.** with the quantity of the part from the **From Bin** and **Lot**.

If the selected **Part** is core tracked, the system calculates **Core Qty.** as the quantity of parts that are designated for repair in **From Store** on the issue header, **From Bin**, and **Lot** minus any parts that are allocated to repair work orders and parts assigned to external repair requisitions.

**Note:** If you entered a **Requisition** on the store-to-store issue header, you can click **Retrieve Parts** to retrieve all the part lines from the selected **Requisition**.

If you attempt to retrieve all the part lines from a requisition and the specified **Issue Qty.** is greater than the **On Hand Qty.**, or if the **Issue Core Qty.** is greater than the **Core Qty.**, the system sets the **Issue Qty.** equal to the available **On Hand Qty.** or sets the **Issue Core Qty.** equal to the available **Core Qty.** If there are no parts or core tracked parts to issue, the system does not add the line from the requisition.

If you have already issued some parts for a requisition but you have not added the complete quantity of the parts requested, click **Retrieve Parts** to create a new line for the remaining quantity of the parts to issue from the selected **Requisition**.

The system populates **Price** and **Currency** with the **Base Price** of the selected **Part** in the **From Store**. The **Base Price** in the **From Store** is determined by the setting of the PRICETYP and PRICELEV installation parameters. The system populates the currency of the price in the adjacent field with the **Currency**.

**Note:** If the part is a core tracked part, the transaction price for the core tracked part is the **Core Value** of the part, rather than the price of a new part.

5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

6 **Line**—Enter the line number for the part on the issue. The system automatically assigns the next incremental number to the line based on the setting of the INCRLINO installation parameter.

7 **Issue Qty.**—Enter the quantity of the part(s) to issue.
Note: If you selected a Requisition on the store-to-store issue header, the system populates Issue Qty. with the Quantity of the part from the store-to-store requisition minus any of the quantity of the part that has been received, scrapped, and any parts that are currently in-transit or that are on an unfinished store-to-store issue for the selected Requisition and Part.

8 Issue Core Qty.—Enter the quantity of the for repair part(s) to issue.

Note: If the selected Part is core tracked, the system enables Issue Core Qty. and populates Core Qty. with the quantity of the parts available to be issued for repair.

You cannot issue parts that have already been assigned to work orders or external repair requisitions, even if the parts have not yet been moved to the Qty. at Shop or Qty. at Supplier. Also, you cannot issue parts that are on any Unfinished store-to-store issues (including the current issue).

9 From Bin—Modify the bin from which to issue the part if necessary. If you modify From Bin, the system removes the part.

Note: If you clear From Bin, the system also clears Lot and recalculates On Hand Qty. and Core Qty. for the From Store, which is the sum of all the parts in all of the bins in the From Store.

If you defined a Default Bin or Default Core Bin, the system populates From Bin with that bin.

When only From Store is entered and From Bin is blank, the system calculates On Hand Qty. and Core Qty. as the sum of the quantities of the Part in all the bins in the From Store.

If you select a From Bin, the system updates On Hand Qty. and Core Qty. for the Store and From Bin. Likewise, if you select a Lot, the system updates On Hand Qty. and Core Qty. for the selected Store, Bin, and Lot combination.

If a Default Core Bin is defined for the Part in the From Store, and you have not entered a value for Issue Core Qty., then the system populates From Bin with the Default Core Bin. If more than one bin-stock record is defined for the Part in the From Store, the system also populates Lot from the bin-stock record. If the Default Bin for the part does not have a bin-stock record in the From Store, the system leaves From Bin blank.

10 Lot—Modify the lot from which to issue the part if necessary.

The system automatically populates the Manufacturer Lot and Expiration Date.

Note: If you clear Lot, the system recalculate On Hand Qty. and Core Qty. for all lots in the selected From Bin.

11 Asset ID—Enter the code identifying the asset associated with the part to transfer. If the selected Part is tracked by asset, the system enables Asset ID, and you must enter an Asset ID for the part if the selected Asset ID has a status of In Store or Purchased/In Store, the system enters 1 as the issue On Hand Qty. If the selected Asset ID has a status of To Be Repaired, the system enters 1 as the Issue Core Qty. To issue multiples of a by asset part, you must add an individual line for each part to issue.

If the selected Asset ID is tracked by serial number, the system populates Serial Number with the serial number of the equipment. The system also populates the From Bin and Lot from the Asset ID, and if you clear the From Bin or the Lot, the system automatically clears the Asset ID.

Note: You can use the Quick Store-to-Store Transfer form to transfer equipment with child equipment in an equipment hierarchy within the same organization.

12 Click Submit.
Note: You can add and delete parts on the issue as necessary, as long as the status of the issue is Unfinished.

Creating store-to-store receipts

Create store-to-store receipts to create electronic records for receiving stock part transfers from one store to another.

After creating the store-to-store issue transaction, the issuing store then physically issues the requested parts to the receiving store, in which the parts must be received. The receiving store then creates a store-to-store receipt transaction to receive the parts from the issuing store.

The Store-to-Store Receipts form enables you to create and manage transactions to receive parts (stock parts, repairable spare parts, and parts tracked by asset) from stores, including stores within different organizations.

Note: You can create multiple receipts for the same store-to-store requisition as necessary.

Creating store-to-store receipt headers

Create store-to-store receipt headers to specify information related to the entire receipt transaction.

The status of the receipt header indicates the progress of the receipt transaction through its cycle.

The system assigns a store-to-store receipt number.

To create store-to-store receipt headers:

1 Open the Store-to-Store Receipts form.
2 Click New Record. The system automatically populates the Date Received with the current system date and time.
3 To Organization—Enter the organization to which to receive the parts. The organization you select must be a specific organization to which you belong.
4 Store-to-Store Receipt—Enter a description of the store-to-store receipt in the adjacent field. The system automatically enters a default store-to-store receipt description based on the setting of the TRANDESC installation parameter.
   The system also assigns a store-to-store receipt number after you save the record.
5 Status—Select the status of the receipt.
   Changing the status of a store-to-store receipt may affect additional system checks and field changes as follows:
   • Unfinished—While the store-to-store receipt has an Unfinished status, the fields on the header are editable. The receipt must maintain Unfinished status until lines are added to the receipt on the Parts tab.
• **Cancelled**—Change the status of the receipt to **Cancelled** to cancel the receipt and all of the part lines. The system protects all fields on the receipt when you change the status to **Cancelled**.

• **Ready for Printing**—Change the status of the receipt to **Ready for Printing** after adding the parts to receive on the **Parts** tab. When the status of the receipt is **Ready for Printing**, only **Status**, **Description**, **Class**, and **Reference Number** are editable.

• **Approved**—The system populates **Approved By** with the **UserID** of the approver of the store-to-store receipt when the status is set to Approved, and all of the fields on the receipt are protected except **Status**.

The system also updates store quantities based on the receipt as follows: parts that are not for repair are moved from **In Transit Qty.** to **Qty. on Hand**; received parts that are for repair are moved from **In Transit Qty.** to **Qty. for Repair**; and all scrapped parts are moved out of the **In Transit Qty.**, but the parts are not added back to inventory. The costs for the receipt transaction are updated for the **To Store** based on by the setting of the **PRICETYP** and **PRICELEV** installation parameters.

**Note:** The system does not update the price of repair parts. The price for the receipt transaction of the repairable spare part is the Core Value of the part.

If the **PRICETIM** installation parameter is set to I, the system updates prices at the time an invoice is created rather than at the time of a receipt. However, for a store-to-store receipt, the system updates prices as though **PRICETIM** is set to R because invoices do not apply to store-to-store transfers. Therefore, for store-to-store transfers, price updates always take place at the time the store-to-store receipt is approved.

For parts that are tracked by asset that are being transferred within the same organization, the system updates the **Store** on the asset to the new **Store** in the receiving organization, and the asset **Status** is set to **In Store**. If the by asset part needs repair, the asset is transferred to the new store with a **Status** of **To Be Repaired**.

For parts tracked by asset that are being transferred between different organizations, the system makes updates in almost the same manner that it does when transferring assets between organizations using the **Transfer Equipment popup**, with the following exceptions: electronic signatures are only required for the transfer if a signature is configured for inserting an asset with **In Store** or **To Be Repaired** status; the system copies all of the fields from the existing asset to a new record for the asset in the new organization, unless they are not valid in the new organization (in which case, the fields will remain null); and if the **Department** is not valid in the new organization, the system populates the **Department** with an asterisk (*).

6 **Requisition**—Enter the store-to-store requisition for which to receive the parts.

The system automatically populates **To Store**, **From Store**, and **From Organization**.

**Note:** If you update the **Requisition** with a different requisition number, the system overwrites **To Store**, **From Store**, and **From Organization** with the values from the new **Requisition**. Likewise, if you clear the **Requisition**, the system also clears **To Store**, **From Store**, and **From Organization**.

7 **To Store**—Enter the store to which to receive the materials.

8 **From Store**—Enter the store from which to receive the materials. The system automatically populates the **From Organization** with the organization of the **From Store**.

9 **Reference Number**—Enter a reference number for the store-to-store receipt transaction.

10 **Class**—Enter the class of the receipt. The classes shown belong to the **TRAN** entity.

11 Click **Save Record**.
Note: After approving a store-to-store receipt, click Create Return Requisition to generate a return requisition for issuing parts between stores for repairable spare parts and their replacement parts more efficiently.

Adding parts to store-to-store receipts

Add parts to store-to-store receipts to designate the parts to receive from one store to another.

Note: The Parts page of the Store-to-Store Receipts form enables you to create multiple lines for the same part on the receipt, but the sum of the quantities of the duplicate parts cannot be greater than the In Transit Qty. or In Transit Core Qty.

To add parts to store-to-store receipts:

1. Open the Store-to-Store Receipts form.
2. Select the receipt to which to add parts, and then click the Parts tab.
3. Click Add Part.
4. Part—Enter the part to add to the store-to-store receipt. The system automatically populates the part description, Part Org., and Track by Asset.

   Note: If you entered a Requisition on the store-to-store receipt header, click Retrieve Parts to retrieve all the part lines from the selected Requisition.

   If you attempt to retrieve all the part lines from a requisition and all the parts have not been issued, the system sets the Receipt Qty. equal to the available In Transit Qty. (or the requested Quantity from the requisition, whichever is least) or sets the Core Receipt Qty. equal to the available In Transit Core Qty. (or the requested Core Qty. from the requisition, whichever is least). If there are no parts to receive, the system does not add the line from the requisition.

   If you created a part line for a partial quantity of the parts to receive from a requisition, clicking Retrieve Parts will create a new line for the remaining quantity of the parts to receive from the selected Requisition.

   The system populates Price with the price of the part at the time of the issue for the part.

   Note: If the Part is core tracked, the transaction price for the receipt transaction for the core tracked part is the Core Value of the part.

   The system populates the To Bin with the Default Bin from the stock record of the part on Stores page of the Parts form, or the Default Core Bin from the Repair Details tab of the Parts form if the part is core tracked.

   The system populates In Transit Qty. with the quantity of the part that is currently in transit (not for repair) minus any parts that are on any unfinished store-to-store receipt (including the current receipt). If the selected Part is core tracked, the system populates In Transit Core Qty. with the quantity of the part that is currently in transit for repair minus any parts that are received, scrapped, or on an unfinished store-to-store receipts (including the current receipt).

5. Condition—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate Condition.
6 **Line**—Enter the line number for the part on the issue if necessary. The system automatically assigns the next incremental number to the line based on the setting of the INCRLINO installation parameter.

7 **Receipt Qty.**—Enter the quantity of the part to receive.

   **Note:** If you selected a Requisition on the store-to-store receipt header, then the system populates Receipt Qty. with the In Transit Qty. of the part from the store-to-store requisition minus any quantity of the part that is already on any unfinished store-to-store receipts for the selected Requisition and Part.

8 **Core Receipt Qty.**—Enter the quantity of the part to receive for repair.

   **Note:** If the selected Part is core tracked, the system enables Core Receipt Qty. and populates Core Receipt Qty. with the In Transit Core Qty. for the selected Requisition and Part.

9 **Scrap Qty.**—Enter the quantity of the part to scrap rather than receive because the part could not be repaired.

   **Note:** If the selected Part is core tracked, the system enables Scrap Qty.

10 **To Bin**—Modify the bin into which to receive the part if necessary.

   **Note:** If you enter Receipt Qty., the system populates the To Bin with the Default Bin for the part. If the part is core tracked, the system populates the To Bin with the Default Core Bin for the part.

11 **Lot**—Modify the lot for which to receive the part if necessary. The system automatically populates Manufacturer Lot and Expiration Date.

12 **Department**—Enter the department of the asset.

13 **Asset ID**—Enter the code identifying the asset associated with the part to receive. If the selected Part is tracked by asset, and you must enter an Asset ID for the part. If the selected Asset ID is in-transit and not for repair, the system enters 1 as the Receipt Qty. If the selected Asset ID is in-transit and for repair, the system enters 1 as the Core Receipt Qty. To receive multiple quantities of a by asset part, you must add individual lines for each part to receive. If the selected Asset ID is tracked by serial number, the system populates Serial Number with the serial number of the equipment.

14 **Click Submit.**

   **Note:** You can add and delete parts on the receipt as necessary, as long as the status of the receipt is Unfinished.

---

### Creating a return requisition for core tracked parts from a store-to-store receipt

Create a return requisition for core tracked parts from a store-to-store receipt to create a requisition for sending good parts back to the store from which the parts for repair were received. A return requisition is used when a store needs to immediately send equivalent parts in good working order to the store from which core tracked parts requiring repair were received, or when a store requests good parts first and then sends the broken parts for repair.
A return requisition is basically a reverse mirror image of the receipt on which the system will reverse the Status of the part lines, e.g., parts with a Status of For Repair will be regular parts, or regular parts will become For Repair parts.

See the following scenario for an illustration of how a return requisition can be used:

STORE1 creates a store-to-store requisition for STORE2 for a quantity of 10 PUMP-MOTOR(s) that are for repair, and then STORE1 issues the parts to STORE2. STORE2 receives 8 of the PUMP MOTOR(s), and scraps 2 of the PUMP MOTOR(s) because they are beyond repair. STORE2 creates a return requisition, and the system adds lines for 10 PUMP MOTOR(s) that are in good working order. STORE2 then issues the 10 parts to STORE1. STORE1 can then receive the 10 good PUMP MOTOR(s) against the return requisition created by STORE2.

This scenario could also be reversed and STORE2 could initiate the store-to-store transfer by creating a store-to-store requisition for issuing the 10 good PUMP MOTOR(s), in which case STORE1 could then create a return requisition to send the 10 broken PUMP MOTOR(s) to STORE2.

To create a return requisition for core tracked parts from a store-to-store receipt:

1. Open the Store-to-Store Receipts form.
2. Select the receipt for which to create a return requisition, and then click the Record View tab.
3. Click Create Return Requisition. The system populates the following fields on the return requisition header:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Populated based on the setting of the REQDESC installation parameter</td>
</tr>
<tr>
<td>Status</td>
<td>The system sets the Status of the return requisition to Unfinished.</td>
</tr>
<tr>
<td>Requested By</td>
<td>Populated with the value of Requested By from the original requisition. However, if the original employee code is not valid in the organization of the return requisition, the system populates Requested By with the user who creates the return requisition.</td>
</tr>
<tr>
<td>Entered By</td>
<td>Populated with user ID of the logged in user</td>
</tr>
<tr>
<td>Date Requested</td>
<td>Current system date and time</td>
</tr>
</tbody>
</table>

The system populates the following fields on the requisition lines:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>The system sets the Status of the return requisition line to Unfinished.</td>
</tr>
<tr>
<td>Requested Before</td>
<td>Current system date and time</td>
</tr>
<tr>
<td>Part</td>
<td>Part from the receipt line</td>
</tr>
</tbody>
</table>
Creating internal repair receipts

Create internal repair receipts for fixed or scrapped repairable spare parts to record and update inventory information associated with repairing parts internally. An internal repair receipt consists of both a header and lines containing the parts to receive from an internal repair work order.

When repairing a part internally, a part to repair is taken from a store location to the shop to be repaired. During the repair process, either complete the repairs on a part, or scrap the part because you cannot repair the part to a usable state. You must receive the parts back into a store, which does not have to be the same store from which they were originally taken for repair.

Create an internal receipt header first, and then add part lines to the receipt. Update the Status of an internal repair receipt to indicate its progress through the receipt process and to initiate system actions based on receipt statuses.

**Note:** For parts tracked by asset, the system automatically changes the Status of the equipment by which the part is tracked to In Store when the part is received, or it changes the status to Withdrawn if the part is scrapped. If the equipment by which the part is tracked is part of an equipment hierarchy, the system cascades the status change for the parent equipment to all the dependent child equipment in the hierarchy.

If RPPRCCAL is set to YES, the system updates part prices in the same manner as it does a normal receipt. If RPPRCCAL is set to NO, internal repair receipts do not affect part prices.

Creating internal repair receipt headers

Create internal repair receipt headers for core tracked parts received for internal repair.

To create internal repair receipt headers:

1. Open the Internal Repair Receipts form.
2. Click New Record.
3 **Organization**—Enter the organization to which the internal repair receipt belongs if you use multi-organization security.

4 **Internal Repair Receipt**—Enter a description of the internal repair receipt in the adjacent field. The system assigns an internal repair receipt number after you save the record.

5 **Status**—Select one of the following options:
   - **Approved**—When you approve an internal repair receipt, the system automatically updates store quantities and moves the repaired parts from Qty. at Shop to Qty. on Hand of the part in the store into which the part is received. The system also updates Qty. Received and Qty. Scrapped on the Repair Parts page of the Work Orders form. The system updates the repair details assignments by matching the work order and lot and then by ordering by store and bin. If a part is tracked by asset, the system also matches the asset by which the part is tracked. Qty. Completed
     
     **Note:** When you approve an internal repair receipt and the part is condition tracked, the system updates Qty. at Shop and Qty. Completed for the work order repair part instead of the repair condition part. Qty. on Hand is updated for the repair condition part instead of the work order repair part. In addition, if the part is tracked by asset and received, the status of the associated asset is updated to Purchased/In Store. If you scrap the part tracked by asset, the status of the associated asset is updated to Withdrawn, and the status of any child assets in a hierarchy are also updated to Withdrawn.
   - **Cancelled**—Select to indicate that the internal repair receipt is cancelled. If you select Cancelled, the system does not update any system quantities for parts or work orders.
   - **Request Approval**—After you have added part lines to the receipt, change the status to Request Approval. The system protects all fields except Status, Description, and Class.
   - **Unfinished**—The system automatically sets the Status of the receipt to Unfinished. Unfinished status indicates that the internal repair receipt is still in progress, and you cannot modify the Status of the receipt from Unfinished to anything but Cancelled until part lines have been added.

6 **Work Order**—Enter the work order for the internal repair receipt.

7 **Store**—Enter the store for the internal repair receipt.

8 **Class**—Enter the class of the commodity. The classes shown belong to the TRAN entity.

9 Click **Save Record**.

---

**Adding parts to internal repair receipts**

Add parts to internal repair receipts after creating the internal repair receipt header. Part lines on an internal receipt contain parts that have been repaired internally using work orders.

To add parts to internal repair receipts:

1 Open the **Internal Repair Receipts** form.

2 Select the internal repair receipt for which to add a part, and then click the **Parts** tab.

3 Click **Add Part**.
4 Part—Enter the part to add to the internal repair receipt. If the part is condition tracked, the system automatically populates Condition.

Note: You can add parts from the repair work order to the receipt individually, or you can retrieve all the parts from the repair work order to the receipt at once.

If you add or retrieve a core tracked part that is tracked by asset, the system automatically creates a line for each individual part and enters 1 as the **Outstanding Qty.** and **Receipt Qty.** for each line. You can change the **Receipt Qty.** to 0 and enter 1 as the **Scrapped Qty.** if necessary.

5 Repair Condition— Enter the repair condition if the part is condition tracked.

6 Repair Price—Enter the repair price of the part.

Note: You can only update the **Repair Price** for the part if the RPPRPCCAL installation parameter is set to YES.

If you entered an Internal Repair Price for a part on the Repair Details page of the Parts form, the system retrieves the **Repair Price** from the repair details for the part. If you did not specify an Internal Repair Price, the system retrieves the **Base Price** of the part for the **Repair Price**.

When you return a core tracked part to a store for repair, the internal repair return does not trigger a price update like a regular return. The system does not update the inventory price until the part has been repaired or scrapped on an internal repair receipt. The system uses the **Repair Price** to determine what cost should be used for the cost update. For example, if a LIFO part was originally issued at 10 USD, the part was returned for repair and repaired on a work order, and then the part was received on an internal repair receipt with a **Repair Price** of 5 USD, the system inserts a new cost record for the part into the RSFIFO table valued at 5 USD.

7 Bin—Enter the bin number storing the part.

8 Lot—Enter the lot number or batch of the part.

Note: The SHOWLOT installation parameter determines whether lots are used for stock information for parts. The default setting for SHOWLOT is Y. If SHOWLOT is set to N, the system disables **Lot**.

If parts were assigned from more than one lot in the assigned repair details, the system creates a line on the receipt for each lot associated with each line on the order. For example, if the work order contains a line with a quantity of 3 for which there are 3 different lots assigned in the assigned repair details for the work order, the system creates three lines with a quantity of 1 for each line. The system calculates the **Outstanding Qty.** as each line is added and then applies it to the Qty. **Assigned** for that lot in all stores and bins. The system then groups the assignments by lot, takes the assigned records sorts, them by store and then by bin.

9 Receipt Qty.—Enter the quantity of the part received for repair.

10 Scrapped Qty.—Enter the quantity of the part to be scrapped rather than repaired.

Note: The sum of the values entered for **Receipt Qty.** and **Scrapped Qty.** must be greater than 0; however, their sum cannot exceed the value of **Outstanding Qty.**

11 Click **Submit**. The system updates the internal repair receipt record with the part details. The system also creates a transaction of type RECV (goods received) for the parts on the receipt.
Creating pick tickets

Create pick tickets to identify a set of parts that are required for a work order activity. Pick tickets facilitate the acquisition of materials needed for a pending work order activity by enabling the worker assigned to a work order to create and print a list of parts required for the work order activity. The worker can then take the ticket to the store and have the parts waiting for pick-up in a short period of time, which makes a pick ticket different than a material list. You can also associate multiple pick tickets with a work order activity or piece of equipment.

After creating a pick ticket, you can update the pick ticket status as necessary based on your status change authorization privileges. Status change authorizations are set up on the Status Authorizations form.

Once the pick ticket has been reviewed and updated as necessary, change the status of the pick ticket to Approved. You can only issue parts listed on the pick ticket after the pick ticket is Approved.

Defining pick ticket headers

Define pick ticket headers to specify the store and supplier information for the pick ticket and the work order – activity or equipment for which the pick ticket is required. You must select either a work order – activity or equipment to create a pick ticket header.

To define pick ticket headers:

1 Open the Pick Tickets form.
2 Click New Record.
3 Pick Ticket—Enter a description of the pick ticket in the adjacent field. The system assigns a pick ticket number after you save the record.
4 Store—Enter the store for which to create the pick ticket. The system automatically populates Originator with the UserID of the logged in user.
5 Status—Select the status of the pick ticket. The system automatically assigns Unfinished as the status of the pick ticket, or the equivalent user code status.
6 Date Required—Enter the date by which the list of parts is needed.
7 Class—Enter the class of the pick ticket. The classes shown belong to the PICK entity.
8 Choose one of the following options:
   • Define the pick ticket for a work order—Enter the Work Order-Activity for which to define a pick ticket. The system automatically populates Equipment with the equipment on the work order header.
   • Define the pick ticket for a piece of equipment—Enter the Equipment for which to define the pick ticket.
9 Deliver to Supplier—Enter the supplier to whom to deliver the parts.
10 Delivery Address—Enter the address to which to deliver the parts.
11 Deliver to Employee—Enter the employee to whom to deliver the parts.
12 Default Approver—Enter the individual responsible for approving the pick ticket.
13 Click **Save Record**.

Note: The system populates and/or updates the **Total Value** of the pick ticket as parts are added to the pick ticket. The system also populates **Approved By** and **Date Approved** with the **User ID** of the approver and the date and time that the pick ticket **Status** is set to **Approved**.

Adding parts to a pick ticket

Add parts to a pick ticket to create the actual list of items needed for a work order – activity or piece of equipment.

After creating the parts list for the pick ticket, you can edit the parts list on the pick ticket as necessary to add or delete parts and update the **Required Qty.** if the status of the pick ticket is Unfinished. You cannot update the parts list for a pick ticket with a status other than Unfinished.

To add parts to a pick ticket:

1. Open the **Pick Tickets** form.
2. Select the pick ticket for which to define parts, and then click the **Parts** tab.
3. Click **Add Part**.
4. **Part**—Enter the part to add to the pick ticket.
5. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6. **Required Qty.**—Enter the quantity of the part needed for the pick ticket.
7. **Manufacturer**—Enter the primary manufacturer of the part.
8. **Manufacturer Part Number**—Enter the primary manufacturer’s part number.

Note: The system may automatically populate **Manufacturer** and **Manufacturer Part Number** depending on the MANUPART installation parameter. The system only displays **Manufacturer** and **Manufacturer Part Number** when MANUPART=Yes.

9. Click **Submit**.

Note: When you save the record, the system automatically populates the **Unit Price** and the **Available Qty.** for each item on the pick ticket. The system also displays the **Qty. Issued** of the part on the pick ticket, as well as the **Available Qty.** of the part in the store.

To delete a part, select the part to delete, and then click **Delete Part**.

Importing a parts list for a pick ticket

Import a parts list for a pick ticket to retrieve an existing list of parts defined elsewhere in the system to the parts list for the pick ticket. The source of the parts list can be a material list or parts associated with a piece of equipment on the equipment record.
The system verifies whether any of the parts to import already exist on the pick ticket and does not import any of the duplicate parts to the pick ticket.

To import a parts list for a pick ticket:

1. Open the **Pick Tickets** form.
2. Select the pick ticket for which to add parts, and then click the **Parts** tab.
3. Click **Import Parts List**.
4. **From**—Select to import the parts list from an equipment record or a preplanned material list, and then enter the piece of equipment or material list from which to import the parts in the adjacent field. The system automatically populates the parts list with the parts associated with the selected equipment or material list.
5. Select the parts to import.
   
   **Note:** To select all lines at once, click **Select All**.

6. Click **Submit**. The system retrieves all of the parts displayed in the parts list to the pick ticket.
7. Add or delete additional parts for the pick ticket as necessary.

### Performing a physical inventory

Performing a physical inventory involves physically counting the materials you have in store and comparing the inventory data that you gather during count with the data stored in your online inventory. The physical inventory process enables you to reconcile your online inventory with the actual stock on the shelves and in bins in your stores. This practice is commonly referred to as a cycle count.

After you finish the physical count, you can enter the actual physical quantities found in your cycle count. If you find that there are discrepancies between the **Expected Qty.** and the **Physical Qty.** of inventory items, you can reconcile all of the inventory discrepancies, and then approve the physical inventory record.

### Generating a physical inventory counting sheet

Generate a physical inventory counting sheet to create a snapshot of the data in your online inventory that you will use to compare with the data you gather during your cycle count. Creating a physical inventory enables you to specify the store and inventory parameters that identify the materials for which you will perform your cycle count.

Enter inventory parameters as necessary to generate a more narrow or specific list of part data captured by the physical inventory snapshot. You can also enter a **Physical Inventory Date**. If you specify a date, the system only includes items in the physical inventory that have been entered into stock prior to the date specified.

**Note:** You can also enter wildcards for the **Part**, **Part Class**, **Stock Class**, **From Bin**, and **To Bin** inventory parameters as necessary to generate data. If you know all but one character, you can enter
the characters you know, and substitute _ for the unknown character. If you only know a portion, you can enter the portion of the parameter that you know, and substitute % for the remaining portion. For example, if you enter P% for Part, the system retrieves all parts that begin with the letter "P." If you enter %PIP% for Part, the system retrieves all parts with codes that include the letters "PIP."

When you generate a physical inventory record, the system only saves the snapshot of your online inventory data generated by the physical inventory. It does not save the parameters you enter. You must enter the parameters upon which to base generation of a physical inventory record each time you want to generate a physical inventory record.

After you physically count your inventory, you can update your online inventory data on the Parts page of the Physical Inventory form to reconcile any discrepancies in your physical and online inventory. After reconciling any differences in your inventory data, you can update the status and/or approve the physical inventory based on your status change authorization privileges. However, the system enables and/or protects the fields available for update based on the status from which you are updating the physical inventory. Status changes for physical inventory Status change authorizations are set up for the TRAN entity on the Status Authorizations form.

If you create a physical inventory record and are unable to perform the actual cycle count immediately, the system also enables you to refresh an existing physical inventory to update the expected quantities in the physical inventory data snapshot.

To generate a physical inventory counting sheet:

1. Open the Physical Inventory form.
2. Click New Record.
3. Store—Select the store for which to create the physical inventory.
4. Physical Inventory—Enter a description of the physical inventory in the adjacent field. The system assigns a physical inventory number after you save the record. The system automatically populates Created By and Date Created.
5. Status—Select the status. The system automatically assigns Unfinished status to the physical inventory, or the equivalent user code status.
    
    **Note:** If the SDATE installation parameter is set to YES, the system updates the Physical Inventory Date to the current date when the status of the physical inventory is set to Approved.

6. Part—Enter the part for which to create the physical inventory.
7. Part Class—Enter the part class for which to create the physical inventory.
8. Stock Class—Enter the stock for which to create the physical inventory.
9. ABC Class—Select the ABC class for which to create the physical inventory.
10. Include Consignment Item(s)—Select to include stock records for consignment items, or items in stock that haven't been paid for, in the physical inventory.
11. From Bin—Enter the bin from which to create the physical inventory.
12. To Bin—Enter the bin to which to create the physical inventory.

    **Note:** Use From Bin and To Bin to indicate a bin range for which to create a physical inventory for numbered bins. For example if you have numbered your bins consecutively, e.g., 001, 002, 003, 004, 005, etc., and you want to create a physical inventory taken from the inventory contained in bins 001 through 005, enter 001 for From Bin and 005 for To Bin to capture a physical inventory for the stock contained in bins 001 through 005.
13 **Physical Inventory Date**—Enter the reference date for the physical inventory. If you enter a date, the system selects only those parts whose **Stock Date** (the date the part is entered into stock) is before the date entered for **Physical Inventory Date**.

14 **Include Child Store(s)**—Select to include stock records for all child stores of the selected **Store** in the physical inventory.

15 **Include Out of Service Item(s)**—Select to include stock records for out of service parts in the physical inventory.

16 **Click Save Record**.

**Note**: After generating the physical inventory and printing the counting sheet, transactions such as issues, returns, and receipts may occur before the database is updated. To update the expected quantities to reflect the current levels in the database, you can select a physical inventory record to update, right-click on the form, and then select **Refresh Inventory**. The system updates the expected quantity of the parts on the physical inventory record on the **Parts** tab of the **Physical Inventory** forms to the current levels. However, you can only refresh the physical inventory if the **Status** is **Unfinished**.

### Entering physical inventory quantities

Enter physical inventory quantities to update the actual physical quantities of inventory items found during your cycle count. You can only enter physical inventory quantities for physical inventory records with **Unfinished** status.

The setting of the STTKDISC installation parameters determines the manner in which the system handles discrepancies between the expected quantities and physical quantities of parts tracked by asset.

**Note**: Regardless of the setting of the STTKDISC installation parameter, the system cannot update the stock level for a part tracked by asset for which there is a discrepancy because parts tracked by asset are tracked individually and their movements and quantities must be accurately recorded.

To enter physical inventory quantities:

1. **Open the Physical Inventory** form.
2. **Select the record for which to enter physical inventory quantities**, and then click the **Parts** tab.
3. **Select the part for which to enter a physical inventory quantity**, and then enter the actual quantity of the part found during the cycle count in **Physical Qty**. Enter the physical quantity for additional parts as necessary.
4. **Click Save Record**.

### Refreshing existing physical inventory data

Refresh existing physical inventory data to update the expected quantities in the physical inventory data snapshot as necessary. Refreshing existing physical inventory data enables you to update an
existing physical inventory if you have been unable to perform the actual cycle count for some time following creating the physical inventory record. You can only refresh physical inventory data for records with **Unfinished** status.

After refreshing existing physical inventory data, you can view the updated expected quantities for the physical inventory on the **Parts** page.

To refresh existing physical inventory data:

1. Open the **Physical Inventory** form.
2. Select the record for which to refresh existing physical inventory data, and then click the **Record View** tab.
3. Right-click on the form, and then select **Refresh Inventory**. The system updates the quantities for the physical inventory on the **Parts** page.

## Generating ABC analysis

Generate ABC analysis to create an ABC analysis report for reference purposes and/or to update the class assignments for part.

ABC inventory analysis is an inventory method that enables you to divide your stock inventory items into three groups or classes: A, B, and C. ABC class assignments are used as selection criteria for a number of material management functions, such as EOQ calculations, stock replenishment, repairable spares, and physical inventory counts.

To generate ABC analysis, enter a percentage value as the cutoff point for each of the three classes. The system then assigns parts to one of the ABC classes by comparing the part's value to the value of other parts. Parts assigned to class A represent the largest percentage of your total inventory value. Parts assigned to class B represent a moderate percentage of your total inventory value. Parts assigned to class C represent a small percentage of your total inventory value.

Depending on your preference, the system determines a part's ABC class based on either part value or part usage value. The system arranges the parts in descending order so that the part with the largest **Percentage of Value** is first, with other parts following in descending order according to their **Percentage of Value**. The system then assigns a class to each part based on the percentages specified for **A Cutoff Point %**, **B Cutoff Point %**, and **C Cutoff Point %**.

**Note:** The system determines part value percentages using the **Price Type** specified for each part. The system enables you to perform ABC Analysis for reference purposes without affecting the current class assignments of a store’s parts, or you can click **Update ABC Class** to automatically update part ABC classes.

To generate ABC analysis:

1. Open the **Generate ABC Analysis** form.
2. **Organization**—Enter the organization for which to generate ABC analysis if you use multi-organization security.
3. **Store**—Enter store for which to perform ABC analysis.
**Note:** You can also enter "wildcards" for **Store** necessary to generate data. If you know all but one character, you can enter the characters you know, and substitute _ for the unknown character. If you only know a portion, you can enter the portion of the parameter that you know, and substitute % for the remaining portion. For example, if you enter P% for **Store**, the system retrieves all stores that begin with the letter "P." If you enter %PIP% for **Store**, the system retrieves all stores with codes that include the letters "PIP."

4 **A Cutoff Point %**—Enter the value of the cutoff point for A. The system automatically enters 70 as the default value.

5 **B Cutoff Point %**—Enter the value of the cutoff point for B. The system automatically enters 20 as the default value.

6 **C Cutoff Point %**—Enter the value of the cutoff point for C. The system automatically enters 10 as the default value.

**Note:** The sum of the values entered for **A Cutoff Point %**, **B Cutoff Point %**, and **C Cutoff Point %** must equal 100%, and you must enter a value for all three points.

7 Select one of the following options:
   - **Usage Based**—Select to calculate ABC analysis based on usage. If you select Usage Based, the system displays the **Quantity** as the number of parts issued from the store minus the returns to store. The system calculates **Total Value** as the product of the **Price** and the **Quantity**. The **Cumulative Percentage** and **ABC Class** are determined based on the usage value for the part rather than the value on hand.
   - **Value Based**—Select to calculate ABC analysis based on values. If you select Value Based, the system displays the **Quantity** as the number of parts currently on hand in the store. The **Total Value** is the product of the **Price** and the **Quantity**. The **Percentage of Value**, **Cumulative Percentage**, and **ABC Class** are determined by the actual value of the parts currently in stock. The system arranges the parts so that the part with the largest percentage of total inventory value is on top with other parts following in descending order according to their percentage of total inventory value.

8 **Print ABC Analysis**—Select to print an ABC analysis report.

9 Click **Process**. The system displays the **Preview** page listing all of the parts for which to generate ABC analysis.

10 Select each part line for which you wish to generate ABC analysis. The system automatically selects all of the part lines. You may remove individual lines from the list by unselecting the line. The system does not update the class assignments for unselected lines.

   **Note:** To select all the parts at once, check **Select**. To unselect all the parts at once, uncheck **Select**.

11 **Print ABC Analysis**—Select to print an ABC analysis report.

12 Click **Update ABC Class** to update the class assignments for parts. The system updates the class assignments and stores the calculated values for each selected part record in the **RSTOCK** table. If any errors occur during the updates, the system highlights the record in red and displays the error in **ErrorMessage**.
Materials management

Viewing and modifying materials information

View and modify materials information as necessary.

Viewing and modifying parts information

View and modify part information as necessary and enter revalued price information for parts.

You can change the default Price Type for a specific part and update the average, last, and standard pricing information for a part. However, you can only update Average price, Last price, and Standard price for parts if the PRICELEV installation parameter is set to P. Price Type defaults to the value specified for PRICETYP, but you can also update and specify default price types for individual parts as necessary.

When PRICELEV is S, prices are always set and updated on the Stores page of the Parts form. When PRICELEV is set to P, prices are set and updated on the Record View page of the Part form. However, if you are using multi-organization security (MOS) and PRICELEV is P, then part prices are set and updated on the Prices page of the Part form.

Revaluation of price information for parts is calculated either at the time of the approval of a receipt for a part or at the time of the approval of an invoice for a part, depending on the setting of the PRICETIM installation parameter. Part revaluation is also calculated according to the PRICETYP installation parameter, which specifies whether the system prices storeroom materials based on the average, last, or standard price.

Any update of price information entered for the average, last, or standard price for a part is copied to the base price of the part, which is the price of the part to be used as the basis for all transactions for the part.

Note: When updating price information, the system does not record a stock transaction for a part if there is no quantity of the part on hand in store or if the updates do not affect the base price of the part.

Delete part records as necessary. However, you cannot delete a part record after:

- it has been associated with a piece of equipment;
- parts have been recorded into stock;
- the part has been used in a pick ticket;
- the part is referenced by a purchase requisition;
- store transactions have been made against it; or
- the part has been allocated or reserved.

To view and modify part information:

1. Open the Parts form.
2. View the list of parts, and then double-click the row containing the part to view or modify.
3. View and modify part information as necessary.

Note: Track by Asset can only be unselected when no asset or profile is associated with the part.

4. Click Save Record.
Viewing and modifying associated documents

View or edit documents associated to the entity.

**Note:** This popup is used when an entity does not have a Documents tab.

To view and modify associated documents:

1. Open the **Parts** form.
2. Select the part for which to view or modify a document, and then click the **Stores** tab.
3. Select a store, and then click **Add/Edit Documents**.
4. Choose one of the following options as necessary:
   - **To view or modify a document**—click **View/Edit Document**. Follow steps 5-10.
   - **To associate a document to an entity**—click **Add Document**. Follow steps 5-10.
   - **To create or upload a document**—click **Create/Upload Document**. See "Uploading documents" on page 60.
5. **Document**—Enter the document to view or edit. The system automatically populates **Document Description**.
6. **Print with Work Order**—Select to print the document with the work order.
7. **Copy to Work Order**—Select to copy the document to the work order.
8. **Print with Purchase Order**—Select to print the document with the purchase order.
9. **Copy to Purchase Order**—Select to copy the document to the purchase order.
10. Click **Save**.

   **Note:** To view the document, click **View/Edit Document**. Click **View Document**. To remove or modify the document link, click **View/Edit Document**. Click **Remove Document Link**. See Removing document associations in the *Infor EAM System Administrator's Guide*.

Viewing and modifying store information

View and modify store information as necessary.

When modifying store information, you can update the **Price Code** for a store. When updating **Price Code** for a store, the system verifies whether there are any outstanding store-to-store transactions (including receipts) for the store. If there are any outstanding store-to-store transactions, you must approve or cancel any outstanding store-to-store transactions before you can update **Price Code**.

You can also update the **Price Type** for the store to average, last, standard, last in first out, or first in first out as necessary if the PRICELEV installation parameter is set to S. If you modify the **Price Type** for the store, the system uses the **Price Type** for the store as the default value for **Price Type** on the **Stores** page of the **Parts** form. If PRICELEV is set to P, you cannot change the price type for the store and **Price Type** is hidden.

If you modify the **Parent Store** for store for which **Copy Parent’s Reorder Details** is selected, the system automatically unselects **Copy Parent’s Reorder Details**. Additionally, you can only select a
Parent Store for the store that is not already designated as a child store in the store hierarchy for the store.

Delete stores as necessary. However, you cannot delete a parent store for which child stores exist, and you cannot delete a store when there is quantity on hand for a stock record within the store.

To view and modify store information:

1. Open the Stores form.
2. View the store list, and then double-click the row containing the store to view or modify.
3. View and modify store details as necessary.
4. Click Save Record.

Viewing and modifying stores associated with parts

View and modify stores associated with parts to review or update store information for a part.

The PRICELEV installation parameter determines the manner in which the system records prices for parts. The default value for PRICELEV is P, which indicates that prices are recorded at the part level, enabling you to enter the price for a part at the parts level on either the Record View page of the Parts form or the Prices page of the Parts form depending on whether you are using MOS. If PRICELEV is set to S, part prices are recorded at the stock level on the Stores page, enabling you to enter different prices for the same part in different stores.

Note: If PRICELEV is P, the system disables Price Type, Average Price, Last Price, Standard Price, and Base Price fields and hides them on the Stores page of the Parts form.

You can change Price Type for a part as necessary. However, if there is a quantity of the part on hand and changing the price type affects the base price of the part, the system records a MPTC stock transaction for the part. If there is no quantity of the part on hand or if changing the price type does not change the base price of the part, the system does not record a transaction for the price type change.

If there is a current quantity of the part on hand and you update the price type to last in first out (LIFO) or first in first out (FIFO), the system creates a stock record for the part in the R5FIFO table part and sets Average Price to the Base Price. The stock record includes the quantity of the part on hand and the price. If there is no quantity on hand, the system does not insert a record into the R5FIFO table.

If you change the price type from LIFO or FIFO to average, last, or standard, the system deletes the record of the part from the R5FIFO table. If any of the price fields are null, the system considers the price to be zero.

Additionally, if there is a current quantity of the part on hand and you change the price type to standard or last and then enter a Standard Price, the system records both a MPTC and CORR stock transaction.

Preferred Store and Preferred Supplier are used for automatic requisition generation for low stock items. Selecting a Preferred Store indicates that the requisition type for the part in store is a Store-to-Store transfer. Because Preferred Store and Preferred Supplier provide different information for a requisition, you can enter either a Preferred Supplier or Preferred Store. You cannot enter a value for both. Selecting a Preferred Supplier indicates that the requisition type for the part is Goods
Requested. Selecting a **Preferred Store** indicates that the requisition for the part should be Store-to-Store.

To view and modify stores associated with parts:

1. Open the **Parts** form.
2. Select the part for which to modify store information, and then click the **Stores** tab.
3. Select the store for which to view or modify information.
4. Modify store information for the part as necessary.
5. Click **Submit**.

### Viewing and modifying stock information for parts

View and modify stock information for parts to update the quantity of a part in stock. You can only update the **Qty. on Hand** when modifying stock information for parts. **Store**, **Bin**, **Price**, and **Lot** are protected. If you enter a new **Qty. on Hand** for the part, the system creates an approved stock transaction for the difference between the old quantity and the new quantity.

**Note:** You cannot delete a stock record for a part if the **Qty. on Hand** of the part is greater than zero.

If you set the **Price Type** for parts in the store to **Last** in first out price or **First** in first out price, then the system inserts a stock record in the **R5FIFO** table for the parts. If you change the **Price Type** for parts in store from **Last** in first out price or **First** in first out price to **Average**, **Last**, or **Standard**, then the system deletes the stock records for any parts in the store from the **R5FIFO** table.

To view and modify stock information for parts:

1. Open the **Parts** form.
2. Select the part for which to view and modify stock information, and then click the **Stock** tab.
3. **Qty. on Hand**—Enter the new quantity of the part in stock.
4. Click **Submit**.

### Viewing and modifying multiple prices of parts (MOS)

View and modify multiple prices of parts as necessary.

You can change the default **Price Type** for a specific part in its organization and update the average, last, and standard pricing information for the part. However, you can only update **Average price**, **Last price**, and **Standard price** for parts if the **PRICELEV** installation parameter is set to **P**.

Any update of price information entered for the average, last, or standard price for a part is copied to the base price of the part in its organization, which is the price of the part to be used as the basis for all transactions for the part in its organization.
Note: When updating price information, the system does not record a stock transaction for a part if there is no quantity of the part on hand in store or if the updates do not affect the base price of the part in its organization.

You can change Price Type for a part as necessary. However, if there is a quantity of the part on hand and changing the price type affects the base price of the part, the system records a MPTC stock transaction for the part. If there is no quantity of the part on hand or if changing the price type does not change the base price of the part, the system does not record a transaction for the price type change.

If there is a current quantity of the part on hand and you update the price type to last in first out (LIFO) or first in first out (FIFO), the system creates a stock record for the part in the R5FIFO table part and sets Average Price to the Base Price. The stock record includes the quantity of the part on hand and the price. If there is no quantity on hand, the system does not insert a record into the R5FIFO table.

If you change the price type from LIFO or FIFO to average, last, or standard, the system deletes the record of the part from the R5FIFO table. If any of the price fields are null, the system considers the price to be zero.

Additionally, if there is a current quantity of the part on hand and you change the price type to standard or last and then enter a Standard Price, the system records both a MPTC and CORR stock transaction.

Revaluation of price information for parts is calculated either at the time of the approval of a receipt for a part or at the time of the approval of an invoice for a part, depending on the setting of the PRICETIM installation parameter. Part revaluation is also calculated according to the PRICETYP installation parameter, which specifies whether the system prices storeroom materials based on the average, last, or standard price.

To view and modify multiple prices of parts (MOS):

1. Open the Parts form.
2. Select the part for which to view or modify prices, and then click the Prices tab.
3. View and modify the price information as necessary.
4. Click Submit.

Viewing and modifying part inspections

View and modify records for incoming part inspections.

To view and modify part inspections:

1. Open the Part Inspections form.
2. Select the part inspection record to view or modify, and then click the Record View tab.
3. Status—Select one of the following options:
   - Unfinished (U)—Indicates that parts have not been inspected
   - Fully rejected (FJ)—Indicates that, after inspection, all parts have been rejected
   - Partially rejected (PJ)—Indicates that, after inspection, only some parts have not been rejected
   - Approved (A)—Indicates that all parts have been approved or that no parts for this order require inspection
4 **Part Location**—Enter the code identifying the receiving location as necessary.
5 **Inspection Qty.**—Enter the number of parts inspected.
6 **Rejected Qty.**—Enter the number of parts rejected, if any.
7 **Reason for Return**—Enter the reason for rejecting or returning the part.
8 **Class**—Enter the class of the inspection.
9 **Inspected By**—Enter the employee who inspected the parts.
10 **Date Inspected**—Enter the date of the inspection.
11 Click **Save Record**. The system automatically populates **Updated By** and **Date Updated**.

**Viewing instructions for part inspections**

View the instructions and comments associated with the selected inspection method on the PO receipt line.

To view instructions for part inspections:

1 Open the **Part Inspections** form.
2 Select the part inspection record for which to view instructions, and then click the **Instructions** tab.
3 View the instructions for the part inspection.

**Viewing usage and demand of parts**

View usage and demand of parts stocked in stores within your organization. For each part, the system identifies each store to which the part has been issued or from which store the part has been returned, the day through which the part usage occurred, demand, and usage. To know how the system determines usage and demand, see the following formulas:

- **Usage** = Issues - Returns
- **Demand** = Quantity of Outgoing Parts - Quantity of Incoming Parts +/- Physical Inventory
  
  (Outgoing Parts = Issues + Transfers Out + Supplier Returns)
  
  (Incoming Parts = Returns, Transfers In, Receipts, and Stock Initializations)

To view usage and demand of parts:

1 Open the **Parts** form.
2 Select the part for which to view usage information, and then click the **Usage** tab.
3 Click **Generate Usage**.
4 View the part usage information.
   
   The system displays the following information for each part in the Usage list:
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store</td>
<td>The store for which usage transactions (issues/returns) have occurred</td>
</tr>
<tr>
<td>Month</td>
<td>The last day through which the usage occurred</td>
</tr>
<tr>
<td>Usage</td>
<td>The difference between the total issues and the returns for the selected part and store during the given month</td>
</tr>
<tr>
<td>Demand</td>
<td>The difference between the quantity of incoming parts (receipts, returns, and incoming part transfers) and the quantity of outgoing parts (issues, transfers, returns to vendors, etc.)</td>
</tr>
<tr>
<td>Note: Demand also reflects part additions or subtractions due to physical inventories and stock initialization.</td>
<td></td>
</tr>
</tbody>
</table>

### Viewing part details

View a list of stores where a part is currently in stock. The Part Details popup will display part quantities and availability.

To view part details:

1. Open the **Parts** form.
2. Select the part for which to view details, and then right-click on the form in the **Record View**.
3. Select **View Part Details**.
4. **Store**—Enter the store for which to view part details.
5. View the part details information.
6. Click **Close**.

### Viewing stock levels by part

To view stock levels by part:

1. Open the **Parts** form.
2 Select the part for which to view stock levels, and then click the **Overview** tab.
3 View the stock level information.

### Viewing purchasing contracts for parts

To view purchasing contracts for parts:

1 Open the **Parts** form.
2 Select the part for which to view the purchasing contract, and then click the **Contracts** tab.
3 View the purchasing contract information.

### Viewing requisitions for parts

View requisitions for parts as necessary. The system displays all requisitions, including store-to-store requisitions.

To view requisitions for parts:

1 Open the **Parts** form.
2 Select the part for which to view requisitions, and then click the **Requisitions** tab.
3 View the requisition information.

### Viewing purchase orders for parts

View purchase orders for parts that have not been fully received.

To view purchase orders for parts:

1 Open the **Parts** form.
2 Select the part for which to view purchase orders, and then click the **Purchase Orders** tab.
3 View the purchase order information.

### Viewing purchase order history for parts

View purchase order history for parts for both open and completed purchase orders.

To view purchase order history for parts:

1 Open the **Parts** form.
2 Select the part for which to view purchase order history, and then click the **PO History** tab.
3 View the purchase order history.

Viewing stock values for LIFO/FIFO parts

To view stock values for LIFO/FIFO parts:

1 Open the Parts form.
2 Select the part for which to view stock values, and then click the Stock Value tab.
3 View the stock value information.

Viewing when and where a part has been used

View when and where a part has been used on the Where Used page of the Parts form. When you associate one part with another part via a Parts Associated page, the system keeps a record of the association and displays the information on the Where Used page.

Note: The system only shows associations of equipment records.

To view when and where a part has been used:

1 Open the Parts form.
2 Select the part for which to view usage information, and then click the Where Used tab.
3 View when and where the part was used.

The system displays the following information for each part in the Where Used list:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity</td>
<td>The entity to which the part was associated</td>
</tr>
<tr>
<td>Code</td>
<td>The code of the record, to which the part was associated, e.g., an asset ID, part number, work order</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization record to which the part was associated</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the Code to which the part was associated</td>
</tr>
<tr>
<td>Quantity</td>
<td>The quantity of the part that was associated to the entity, code, etc.</td>
</tr>
<tr>
<td>Component Location</td>
<td>The component or part location to which the part was associated</td>
</tr>
<tr>
<td>Comments</td>
<td>The comments entered when the part was associated</td>
</tr>
</tbody>
</table>
The object type of the record to which the part was associated

Field | Description
--- | ---
Type | The object type of the record to which the part was associated

Viewing stock transactions for parts

View stock transactions for parts within the past 30 days.

To view stock transactions for parts:

1. Open the Parts form.
2. Select the part for which to view stock transactions, and then click the Transactions tab.
3. View the stock transaction information.

The system displays the following information for each part in the Transactions list:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part</td>
<td>The code of the part associated with the part transaction</td>
</tr>
<tr>
<td>Part Org.</td>
<td>The organization of the part associated with the part transaction</td>
</tr>
<tr>
<td>Type</td>
<td>The type of transaction with which the part was associated, e.g., Stock take, Issue or return, Goods received, etc.</td>
</tr>
<tr>
<td>Store</td>
<td>The code of the store with which the part transaction was associated</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the Store associated with the part transaction</td>
</tr>
<tr>
<td>Store Org.</td>
<td>The organization of the Store associated with the part transaction</td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the part associated with the part transaction</td>
</tr>
<tr>
<td>Issued Part</td>
<td>The part associated to the condition for which it was originally issued</td>
</tr>
<tr>
<td>Transaction Qty.</td>
<td>The quantity of the part involved in the transaction. Positive quantities designate an increase in the quantity of the part in inventory, such as a receipt. Negative quantities indicate a decrease in the quantity of the part in inventory, such as an issue or return.</td>
</tr>
<tr>
<td><strong>Field</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Date</td>
<td>The date on which the part transaction occurred</td>
</tr>
<tr>
<td>Price</td>
<td>The price of the part the system used for the transaction</td>
</tr>
<tr>
<td>Issued By</td>
<td>If the part transaction is an issue, the system displays the <strong>UserID</strong> of the user who issued the part.</td>
</tr>
<tr>
<td>Issued To</td>
<td>If the part transaction is an issue, the system displays the <strong>Employee</strong> code of person to which the part was issued.</td>
</tr>
<tr>
<td>Class</td>
<td>The class of the part</td>
</tr>
<tr>
<td>Class Org.</td>
<td>The organization of the <strong>Class</strong></td>
</tr>
<tr>
<td>Transaction Number</td>
<td>The transaction number assigned to the transaction</td>
</tr>
<tr>
<td>Line</td>
<td>The line number of the part on the transaction involving the part, e.g., the line number on the requisition, purchase order, work order, etc.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the transaction involving the part</td>
</tr>
<tr>
<td>Pick Ticket</td>
<td>If the part was added to a pick ticket, the system displays the number.</td>
</tr>
<tr>
<td>Work Order</td>
<td>If the part was added to a work order, the system displays the number.</td>
</tr>
<tr>
<td>Activity</td>
<td>If the part was added to a work order, the system displays the work order number for which the part transaction occurred.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>If the part was added to a purchase order, the system displays the number.</td>
</tr>
<tr>
<td>PO Org.</td>
<td>The organization of the purchase order associated with the part transaction</td>
</tr>
<tr>
<td>Requisition</td>
<td>If the part was added to a requisition, the system displays the number.</td>
</tr>
<tr>
<td>Supplier</td>
<td>The supplier for the requisition associated with the part transaction</td>
</tr>
<tr>
<td>Bin</td>
<td>The bin involved in the part transaction. For issue transactions, the system displays the bin location from which the part is issued. For receipts, the system displays the bin location into which the part is received.</td>
</tr>
</tbody>
</table>
**Field** | **Description**
--- | ---
Lot | The lot of the part involved in the transaction
Asset ID | The code of the equipment associated with the transaction
Asset Org. | The organization of the Asset ID associated with the part transaction
Parent Work Order | If the transaction for the part is associated with a MEC work order, then the system displays the number identifying the parent multiple equipment work order associated with the transaction.

**Note:** The system enables you to search for all transactions associated with a multiple equipment work order by defining a Quick Filter using Parent Work Order as part of the filter criteria.

Warranty | Indicates whether the part involved in the transaction is covered under warranty
Consignment | Indicates whether the part involved in the transaction is a part under consignment
Direct | Indicates whether the part involved in the transaction is a direct purchase item received directly to a work order, purchase order, etc.

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**Viewing stock in-transit for parts**

View stock information for parts held in stores that are in-transit between stores.

To view stock in-transit for parts:

1. Open the *Stores* form.
2. Select the store for which to view stock in-transit information, and then click the *Stock In-transit* tab.
3. View the stock information for the parts held in the selected store that currently have In-transit status.

The system displays the following information for each part in the Stock In-transit list:

**Field** | **Description**
--- | ---
Part | The code of the part that is in-transit
Part Description | The description of the part that is in-transit
Part Org. | The organization of the part that is in-transit
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>The quantity of the part that is in-transit</td>
</tr>
<tr>
<td>For Repair Qty.</td>
<td>The quantity of a repairable spare part that is currently in-transit for repair. Repairable spare parts have repair details associated on the part record that specify whether a part is to be repaired internally or externally, and they include additional information about the system uses to generate repair work orders or requisitions for repairing the part. Therefore, a value displayed for For Repair Qty. indicates that the part is in-transit for repair internally or externally.</td>
</tr>
<tr>
<td>Destination</td>
<td>The entity of the destination, e.g., PART, STO</td>
</tr>
<tr>
<td>Destination Code</td>
<td>The code identifying the destination, e.g., the part code or store code</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>The purchase order associated with the transaction for which the part is in-transit</td>
</tr>
<tr>
<td>PO Org.</td>
<td>The organization of the purchase order associated with the transaction for which the part is in-transit</td>
</tr>
<tr>
<td>Requisition</td>
<td>The requisition associated with the transaction for which the part is in-transit</td>
</tr>
<tr>
<td>Equipment</td>
<td>The equipment associated with the transaction for which the part is in-transit</td>
</tr>
<tr>
<td>Equipment Org.</td>
<td>The organization of the equipment associated with the transaction for which the part is in-transit</td>
</tr>
<tr>
<td>Lot</td>
<td>The lot of the part that is in-transit</td>
</tr>
</tbody>
</table>

### Viewing part reservations

View part reservations for parts in store that are reserved or allocated for work orders.

To view part reservations:

1. Open the Parts form.
2. Select the part for which to view part reservations, and then click the Stores tab.
3. Select the store for which to view part reservations, and then click View Parts Reserved.
4. View the work order reservations for the part in the selected store.

**Note:** Part reservations can be initiated by material lists or reservations initiated on a work order.
Click Close.

Viewing parts associated with manufacturers
To view parts associated with manufacturers:
1. Open the Manufacturer Part Numbers form.
2. View the parts information.

Viewing parts associated with suppliers
To view parts associated with suppliers:
1. Open the Supplier Part Numbers form.
2. View the part information.

Viewing stock for stores
View stock for stores to view information about parts held in specific stores, such as the part number, the bin/lot combination for the part, and the quantity of the part on hand.
To view stock for stores:
1. Open the Stores form.
2. Select the store for which to view stock, and then click the Stock tab.
3. View the stock information for the parts held in the selected store.

Viewing stock levels by store
To view stock levels by store:
1. Open the Stores form.
2. Select the store for which to view stock levels, and then click the Overview tab.
3. View the stock level information.
Viewing stock transactions per store

View stock transactions per store. The system maintains a history of every stock transaction per store. View information such as when a specific part was received to stock, how much the part cost, and to what purchase order the part belonged.

To view stock transactions per store:

1. Open the Stores form.
2. Select the store for which to view stock transactions, and then click the Transactions tab.
3. View the stock transactions. The system displays the following information for each stock transaction in the Transactions list:

   The system displays the following information for each stock transaction in the Transactions list:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The type of transaction with which the part was associated, e.g., Stock take, Issue or return, Goods received, etc.</td>
</tr>
<tr>
<td>Part</td>
<td>The code of the part with which the transaction was associated</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the Part associated with the stock transaction</td>
</tr>
<tr>
<td>Part Org.</td>
<td>The organization of the Part associated with the stock transaction</td>
</tr>
<tr>
<td>Transaction Qty.</td>
<td>The quantity of the part involved in the stock transaction. Positive quantities designate an increase in the quantity of the part in inventory, such as a receipt. Negative quantities indicate a decrease in the quantity of the part in inventory, such as an issue or return.</td>
</tr>
<tr>
<td>Date</td>
<td>The date on which the stock transaction occurred</td>
</tr>
<tr>
<td>Price</td>
<td>The price of the part the system used for the transaction</td>
</tr>
<tr>
<td>Originator</td>
<td>If the part transaction is an issue, the system displays the User ID of the user from whom the stock transaction originated.</td>
</tr>
<tr>
<td>Issued To</td>
<td>If the part transaction is an issue, the system displays the Employee code of the person to which the part associated with the stock transaction was issued.</td>
</tr>
<tr>
<td>Class</td>
<td>The class of the part the system used for the stock transaction</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Class Org.</td>
<td>The organization to which the class used for the stock transaction belongs</td>
</tr>
<tr>
<td>Transaction Number</td>
<td>The number identifying the stock transaction</td>
</tr>
<tr>
<td>Line</td>
<td>The line number of the part on the stock transaction involving the part, e.g., the line number on the requisition, purchase order, work order, etc.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the stock transaction involving the part</td>
</tr>
<tr>
<td>Pick Ticket</td>
<td>If the stock transaction was associated with a pick ticket, the system displays the number.</td>
</tr>
<tr>
<td>Work Order</td>
<td>If the stock transaction was associated with a work order, the system displays the number.</td>
</tr>
<tr>
<td>Activity</td>
<td>If the stock transaction was associated with a work order, the system displays the activity on the work order for which the part transaction occurred.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>If the stock transaction was associated with a purchase order, the system displays the number.</td>
</tr>
<tr>
<td>Purchase Order Org.</td>
<td>The organization of the purchase order associated with the part transaction</td>
</tr>
<tr>
<td>Requisition</td>
<td>If the stock transaction was associated with a requisition, the system displays the number.</td>
</tr>
<tr>
<td>Supplier</td>
<td>The supplier for the requisition associated with the part transaction</td>
</tr>
<tr>
<td>Bin</td>
<td>The bin involved in the part transaction. For issue transactions, the system displays the bin location from which the part is issued. For receipts, the system displays the bin location into which the part is received.</td>
</tr>
<tr>
<td>Lot</td>
<td>The lot of the part involved in the transaction</td>
</tr>
<tr>
<td>Asset ID</td>
<td>The code of the equipment associated with the transaction</td>
</tr>
<tr>
<td>Asset Org.</td>
<td>The organization of the Asset ID associated with the stock transaction</td>
</tr>
<tr>
<td>Parent Work Order</td>
<td>If the transaction for the store is associated with a MEC work order, then the system displays the number identifying the parent multiple equipment work order associated with the transaction.</td>
</tr>
</tbody>
</table>
The system enables you to search for all transactions associated with a multiple equipment work order by defining a Quick Filter using Parent Work Order as part of the filter criteria.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scrapped Qty.</td>
<td>The number of repairable spare parts that were scrapped for the stock transaction</td>
</tr>
<tr>
<td>Warranty</td>
<td>Indicates whether the part involved in the transaction is covered under warranty</td>
</tr>
<tr>
<td>Consignment</td>
<td>Indicates whether the stock transaction was associated with a part under consignment</td>
</tr>
<tr>
<td>Direct</td>
<td>Indicates whether the stock transaction was associated with a direct purchase item received directly to a work order, purchase order, etc.</td>
</tr>
</tbody>
</table>

**Viewing bin stock**

View bin stock per lot. For each lot, the system displays parts contained within that lot and specifies their store and bin location.

To view bin stock:

1. Open the **Lots** form.
2. Select the lot for which to view bin stock, and then click the **Bins Per Store** tab.
3. View the bin stock information.

**Managing iProcure items in Infor EAM**

iProcure allows customers to plan work, track parts usage, manage stock levels, and replenish stock via the Internet. Now Infor EAM customers with iProcure can manage part information in Infor EAM.

**Note:** This section covers functionality available in iProcure. If you have not purchased iProcure, you do not have access to all of the functionality covered in this section.

**Creating iProcure vendors**

Create iProcure vendors in Infor EAM.
To create iProcure vendors:

1. Open the **iProcure Vendors** form.
2. Click the **Record View** tab.
3. Click **Download iProcure Vendors**. The system sends a request to iProcure and then downloads and saves the iProcure vendors.
4. Click **OK**.

**Note:** To create Infor EAM suppliers, click **Create Infor EAM Suppliers**.

Creating Infor EAM suppliers for iProcure vendors

Create a new supplier for each iProcure vendor that currently does not have an associated supplier record.

To create Infor EAM suppliers for iProcure vendors:

1. Open the **iProcure Vendors** form.
2. Click the **Record View** tab.
3. Click **Create Infor EAM Suppliers**. The system creates a new supplier record for each vendor record that currently does not have an associated supplier record.
4. Click **OK**.

Associating Infor EAM suppliers with iProcure vendors

Associate an Infor EAM supplier with a iProcure vendor in Infor EAM.

To associate Infor EAM suppliers with iProcure vendors:

1. Open the **iProcure Vendors** form.
2. Select the iProcure Vendor with which to associate an Infor EAM supplier, and then click the **Infor EAM Suppliers** tab.
3. Click **Add Supplier**.
4. **Supplier**—Enter the supplier with which to associate the iProcure vendor. The system automatically populates **Supplier Description**, **Supplier Org.**, and **Payment Method**.
5. Click **Submit**. The system updates the Infor EAM Suppliers list.

Associating iProcure items with parts

Associate iProcure items with parts on the **Suppliers** page of the **Parts** form.

To associate iProcure items with parts:

1. Open the **Parts** form.
2 Select the part with which to associate iProcure items, and then click the Suppliers tab.
3 Select the supplier for which to update the parts catalog, and then click Add iProcure Item Association.
4 Enter the Part #.
5 Select the item, and then enter the number of items.
6 Click . The system adds the item to the shopping cart.
7 Click Retrieve Part. The system retrieves the part information, associates the iProcure item with the part for the associated Infor EAM supplier, and then updates the supplier catalog.

Updating iProcure items

Update iProcure items in the parts catalog.

To update iProcure items:

1 Open the Parts form.
2 Select the part to update, and then click the Suppliers tab.
3 Choose one of the following options:
   • Update iProcure Items—Click to update the parts catalog for all suppliers associated with the selected part. The system updates Gross Price, Lead Time, and iProcure Date Last Updated in the parts catalog for all suppliers.
   • Update Selected iProcure Item—Click to update the parts catalog for selected suppliers associated with the selected part. The system updates Gross Price, Lead Time, and iProcure Date Last Updated in the parts catalog for the selected suppliers.

Adding iProcure part items to requisitions

Add iProcure part items to requisitions.

To add iProcure part items to requisitions:

1 Open the Requisitions form.
2 Select the requisition for which to add iProcure part items, and then click the Parts tab.
   Note: The requisition must have a status of Unfinished to add iProcure part items.
3 Click Add Parts (iProcure Items). The system displays the Add Parts iProcure Items page.
4 Enter the Part #. The system displays the Search Results page.
5 Select the item to add, and then enter the number of items.
6 Click . The system adds the item to the shopping cart.
7 Click Add Parts (iProcure Items). The system adds the iProcure part item to the selected requisition, updates the supplier's catalog, and automatically populates iProcure Date Last Updated.
Viewing iProcure sync errors

View iProcure sync errors for part catalog records.

To view iProcure sync errors:

1. Open the Requisitions form.
2. Select the requisition for which to view iProcure sync errors, and then click the Parts tab.
   
   **Note:** You may also view iProcure sync errors on the Suppliers page of the Parts form, the Parts page of the Suppliers form, and the Parts page of the Purchase Orders form.

3. Click View iProcure Sync Errors.
4. View the errors.
5. Click Close.
The purchasing management module corresponds with the materials management module to facilitate the process of purchasing goods. Use the purchasing management module to create and revise purchase orders. You can also add existing parts or create new parts to add to purchase orders, enter extra charges or discounts, and associate purchasing clauses.

Defining initial purchase information

Define initial purchase information before using the purchasing management module.

Defining purchase order terms

Define purchase order terms to use in purchase order activities. Various suppliers might have different types of purchase terms. The system has five predefined types of purchase order terms. You can also edit purchase order terms as necessary.

For example, select Freight Terms as the type for an individual purchase order term. This purchase order term appears in the Freight Terms lookup on the Suppliers form. Set up the individual codes for each of the following types of order terms:

- **FOB (Free On Board) point (FOB)**—Define where to take possession of an item, e.g., a receiving dock.
- **Freight terms (FRTR)**—Establish how different freight charges are paid and who pays them.
- **Payment terms (PAY)**—Enter how a supplier is paid for a purchase, e.g., COD.
- **Payment method (PYMT)**—Enter what method is used to pay the supplier.
- **Ship via (SHIP)**—Define how the supplier ships an item, e.g., overnight, regular mail, etc.

To define purchase order terms:

1. Open the **PO Terms** form.
2. Click **New Record**.
3 Organization—Enter the organization to which the purchase order term belongs if you use multi-organization security.

4 PO Term—Enter a unique code identifying the purchase order term, and then enter a description of the purchase order term in the adjacent field.

5 Type—Select the type of purchase order term.

6 Click Save Record.

---

### Defining purchasing clauses

Define purchasing clauses to create a list of legal agreements. Attach purchasing clauses to contract classes, purchase orders, or blanket purchase orders. Use the International Standards Organization (ISO) purchasing clauses predefined in the system, or define purchasing clauses to suit your organization’s needs. You can also edit purchasing clauses after creating them as necessary.

Finally, you can create hierarchies with a general purchasing clause as a parent and more specific purchasing clauses set up as children.

To define purchasing clauses:

1 Open the Purchasing Clauses form.

2 Click New Record.

3 Organization—Enter the organization to which the purchasing clause belongs if you use multi-organization security.

4 Clause—Enter a unique code identifying the purchasing clause, and then enter a description of the purchasing clause in the adjacent field.

5 Class—Enter the class of the purchasing clause.

6 Sequence Number—Enter a number to indicate the order of the child purchasing clause in relation to the parent purchasing clause, if applicable. The sequence number determines the hierarchy of the child purchasing clauses.

7 Parent Clause—Enter the parent purchasing clause, if applicable.

8 Out of Service—Select to prevent the purchasing clause from being displayed in the lookups.

9 Click Save Record.

---

### Defining children for purchasing clauses

Children can be added to purchasing clauses as additions to existing clauses.

To define children for purchasing clauses:

1 Open the Purchasing Clauses form.

2 Select the clause for which to define children, and then click the Children tab.

3 Click Add Child Clause.

4 Sequence Number—Enter the sequence number for the clause.
5 **Child Clause**—Enter the child clause to associate with the contract class of the header clause. The system automatically populates the child clause description and **Child Clause Org**.

6 Click **Submit**.

   **Note:** To remove a child clause from the header clause, select the child clause to remove, and then click **Remove Child Clause**.

---

### Viewing purchasing clause hierarchies

View the existing relationship between ISO purchasing clauses as well as newly created purchasing clauses.

To view purchasing clause hierarchies:

1 Open the **Purchasing Clauses** form.
2 Select the purchasing clause for which to view the hierarchy, and then click the **Children** tab.
3 View the purchasing clause information.

---

### Defining delivery addresses

Define and maintain delivery addresses for purchasing and materials.

To define delivery addresses:

1 Open the **Delivery Addresses** form.
2 Click **New Record**.
3 **Delivery Address**—Enter a unique code identifying the delivery address, and then enter a description of the delivery address in the adjacent field.
4 **Address 1**—Enter the first line of the delivery address.
5 **Address 2**—Enter the second line of the delivery address.
6 **Address 3**—Enter the third line of the delivery address.
7 **City**—Enter the city for the delivery address.
8 **State**—Enter the state for the delivery address.
9 **Telephone**—Enter the telephone number at the delivery address.
10 **Extension**—Enter the telephone number extension at the delivery address.
11 **Zip Code**—Enter the zip code for the delivery address.
12 **Country**—Enter the country for the delivery address.
13 **Fax/Telex**—Enter the fax or telex number at the delivery address.
14 **E-mail Address**—Enter the e-mail address for the delivery address.
15 **Full Address**—Enter the full delivery address.
16 **Out of Service**—Select to prevent the delivery address from being displayed in lookups.
17 Click **Save Record**.
Defining credit cards

Define credit cards for use as payment on purchase orders.

To define credit cards:

1. Open the Credit Card Numbers form.
2. Click New Record.
3. Organization—Enter the organization of the credit card if you use multi-organizational security.
4. Last 4 of Credit Card—Enter the last four digits of the credit card number, and then enter a description of the credit card in the adjacent field.
5. Type—Enter the type of the credit card.
6. Expiration (Month/Year)—Enter a two-digit number for the month, and then enter a four-digit number for the year.
7. Class—Enter the class of the credit card.
8. Class Org.—Enter the organization of the class.
9. Expiration Date—Enter the expiration date for the credit card. The system defaults Expiration Date to the month entered as the Expiration month, the last day of the Expiration month, and the year of Expiration.
10. Name—Enter the name that appears on the credit card.
11. Out of Service—Select to set this credit card record to out of service.
12. Click Save Record.

Defining users for credit cards

Define users authorized to charge purchase orders to a specific credit card.

To define users for credit cards:

1. Open the Credit Card Numbers form.
2. Select the credit card number for which to define users, and then click the Users tab.
3. User—Enter the name of the user to associate with the credit card number. The system automatically populates the user description.
4. Default—Select to set the user as the default user for the credit card number.
5. Click Submit.

Creating and revising purchase orders

Create and revise purchase orders. The purchase order creation process has several steps. First, create the purchase order header and then add line items for parts and services. At this stage, you can also adjust part charges, associate clauses, create work orders and activities from service lines,
and associate assets for parts tracked by asset. Next, change the status to Ready for printing to print the purchase order for approval. Finally, approve the purchase order and send it to the supplier. To change the status of a purchase order, enter a new status on the Record View page of the Purchase Orders form. See the following descriptions when changing the status:

- **Unfinished**—The purchase order is at the creation stage; create the purchase order header and add parts.
- **Ready for printing**—The purchase order is ready for approval/printing.
- **Cancelled**—The purchase order is cancelled.
- **Approved/completed**—The purchase order is approved and ready to be sent to a supplier.

**Note:** When you approve a purchase order containing lines with repairable spare parts of Type External Repair, the system moves the Requested Qty. (UOM) of the part from the Qty. for Repair to the Qty. at Supplier on the Stores page of the Parts form. If the is part tracked by asset, the system changes the status of the asset associated with the part to In Repair. If the asset is a parent in an asset hierarchy, the system changes the status of any dependent child assets to In Repair.

If you cancel a purchase order containing lines with repairable spare parts of Type External Repair, the system gives you the option to cancel the requisition. If you select to also cancel the requisition, the system deletes the repair detail assignments for the part, and if the parts have been moved from Qty. to Repair to Qty at Supplier, the system moves the parts back to the Qty. for Repair.

### Creating purchase order headers

Create purchase order headers for new purchase orders.

**Note:** If you are the originator of a purchase order, you might have an approval limit. This limit defines the total maximum value of all the line items on a purchase order. The approval limit may be set up at either the purchase order header level or the line item detail level. If the total exceeds your limit, you might need to have someone else (typically a manager) approve the amount.

To create purchase order headers:

1. Open the **Purchase Orders** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the purchase order belongs if you use multi-organization security. The system automatically populates the purchase order description, **Status**, **Store**, **Buyer**, and **Due Date**.
4. **Purchase Order**—Enter a description of the purchase order in the adjacent field. The system assigns a purchase order number after you save the record. If the purchase order has numerous revisions, the system automatically populates **Revision Number**.
5. **Status**—Select the status value of the purchase order.

  **Note:** Your authorization level determines the values available for **Status**.

6. **Store**—Enter a storeroom.
7. **Originator**—Enter the employee requesting the purchase order.
8. **Due Date**—Enter the expected arrival date for the items.
9 **Buyer**—Enter the buyer responsible for the purchase order.

10 **Delivery Address**—Enter the delivery address for the purchase order.

11 **Class**—Enter the class of the purchase order. The system automatically populates **Class Org**.

12 **Package Tracking Number**—Enter the unique number by which to track the delivery of the shipment for the purchase order.

13 **Supplier**—Enter a supplier. The system automatically populates the supplier’s default **Currency**, the current **Exchange Rate**, **Language**, and **Lead Time (Days)**.

   If the items are covered under a specific contract with a supplier, the system displays **Contract** and **Discount** information after you add lines to the purchase order. **Contract** and **Discount** apply only to individual orders.

14 **Currency**—Enter the currency you use to purchase the item.

15 **Exchange Rate**—Enter the current exchange rate.

   **Note:** You can update the **Currency** if there is an exchange rate defined for the currency. You can update the **Exchange Rate** when the EXRTUPDT installation parameter is set to YES.

16 **Default Approver**—Enter the employee responsible for approving the purchase order.

17 **Ship Via**—Enter the manner in which the supplier ships the specific item.

18 **Payment Terms**—Enter the manner in which the supplier is paid for the purchase.

19 **Freight Terms**—Enter the manner in which the freight charges are paid and who pays them.

20 **FOB Point**—Enter where you take possession of the item.

21 **Payment Method**—Enter the method used to pay the supplier.

   **Note:** Click **Default Terms**. The system automatically populates **Ship Via**, **Payment Terms**, **Freight Terms**, **FOB Point**, and **Payment Method** with the values entered on the **Suppliers** form.

   After the purchase order is approved, the system displays **Approved By** and **Date Approved**.

   After lines are added to the purchase order, the system displays **Part Lines**, **Service Lines**, **PO Lines**, **Total Tax**, **Total Extra Charges/Discounts**, **Total Part Value**, **Total Service Value**, and **Total PO Value**.

22 Click **Save Record**.

   **Note:** Click **Create New Revision** to create a new revision of the purchase order.

   Click **Receive All Parts** to create a receipt for all outstanding parts.

---

**Adding part details to purchase orders**

Add specific line items to the purchase order. You can add both cataloged and non-cataloged parts, and you can add items from an existing requisition. You can also create new parts to add to purchase orders.

**Note:** You can only add part details to a purchase order if the purchase order header status is Unfinished.

You can only update part details if the part line status is Unfinished.
To add part details to purchase orders:

1. Open the **Purchase Orders** form.
2. Select the purchase order for which to add part details, and then click the **Parts** tab.
3. Click **Add Part Line**.
4. **Requisition-Line**—Enter the requisition and line number from which to add the part(s) to the purchase order. If you select a **Requisition-Line**, the system populates (overwrites) the following fields from the requisition: **Due Date**, **Requested Qty.**, **Part**, **Description**, **Part Org.**, **Supp. Catalog Reference**, **Requested Qty. (UOM)**, **Price**, **Work Order–Activity**, **Cost Code**, **Inspection**, **Line Type**, and **Assigned Qty**.

   **Note**: If the selected **Requisition–Line** contains parts related to a multiple equipment work order, then the system populates **Work Order–Activity**, **Equipment**, **Equipment Org.**, and **Related Work Order** from the requisition/line.

5. **Part**—Enter the part to add to the purchase order. If the part is cataloged, the system automatically populates the part description, **Purchase Qty. (UOP)**, **Requested Qty. (UOM)**, **Price**, **Qty.per UOP**, **Contract Discount**, **Part Line Subtotal**, **Total Tax Amount**, **Total Extra Charges/Discounts**, and **Part Line Total**.

   **Note**: The **Assigned Qty.** for a core tracked part is equal to the number of parts for which repair details are assigned for the requisition line.

   The system performs a search to find an approved contract for the selected part. If an approved contract is found, the system populates **Contract** with the contract that was found.

   The system searches for an approved contract for the selected PO header supplier, store, and currency.

6. **Type**—Select the type of materials to order.
7. **Line**—Enter the line number of the purchase order.
8. **Purchase Qty. (UOP)**—Enter the amount and UOP in which the supplier provides the part.
9. **Requested Qty. (UOM)**—Enter the amount in which you receive the part to stock. The system automatically populates the UOM.
10. **Price**—Enter the price of a single part and the currency you use to purchase the part in the adjacent field.
11. **Work Order–Activity**—Enter the work order and activity if you are ordering this item for a work order activity. When you select a **Work Order–Activity**, the system automatically populates **Type** with Direct Materials and populates **Equipment** from the work order and it is protected.

   **Note**: If the selected **Work Order–Activity** is a multiple equipment work order, the system enables **Equipment**, and it is required.

12. **Equipment**—Enter the equipment associated with the purchase order if you have not entered a **Work Order–Activity** and want to associate an equipment record with the purchase order. The system populates **Type** with **Direct Materials**, which enables the system to create a work order "on the fly".

   Choose one of the following options if the work order is a multiple equipment work order:
   • Enter a specific equipment to which to distribute the cost of the part.
Enter **All Equipment** to evenly distribute the cost of the part to each equipment record on the work order.

Enter **WO Header Equipment** to distribute the cost of the part to the equipment on the work order header only.

**Note:** If the selected **Part** is tracked by asset, then the system clears **Equipment**, **Equipment Org.**, and **Related Work Order** because you cannot distribute a part tracked by asset across multiple equipment.

**13 Delivery Address**—Enter the address to which to deliver the part.

**14 Tax Code**—Enter any additional taxes to apply to the part line as necessary.

**15 Status**—Select the status of the part line.

**Note:** The system does not move core tracked parts for which there are repair detail assignments from **Core Qty.** to **Qty. at Supplier** until the **Status** of the purchase order header is Approved, regardless of the status of the part line.

**16 Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

**17 Qty. per UOP**—Enter the conversion factor.

**Note:** For example, if the supplier's UOM for the part is a case of 12 parts but your UOM for the part is each, **Purchase Qty. (UOP)** will be 1 for one case, but **Requested Qty. (UOM)** will be 12 (1 case = 12 parts). If you enter 2 for the **Purchase Qty. (UOP)**, the system uses **Qty. per UOP** to update the **Requested Qty.** to 24.

**18 Due Date**—Enter the expected arrival date of the items.

**19 Package Tracking Number**—Enter the unique number by which to track the delivery of the shipment for the purchase order.

**20 Track by Asset**—The system displays whether or not the part is tracked as an asset.

**21** Click **Submit**. The system automatically creates a new line number for each new part line added. If you wish to update a line number, use Screen Designer to display **Line** and enter a new part line manually.

**Note:** If you have a preset monetary limit established for purchase orders, the system will not allow you to save any amount greater than this limit. If MOS is set to YES, the limit is determined on the **Organizations** page of the **Users** form. If MOS is set to NO, the limit is determined on the **Users** form.

To delete a part, select the part to delete, and then click **Delete Part**.

Creating new parts to add to purchase orders

Create new parts to add to purchase orders. When you need to add a part that has not been previously created in the system, create the new part on the **Parts** page of the **Purchase Orders** form.

**Note:** You cannot create a new part for an existing part line.

To create new parts to add to purchase orders:
1. Open the Purchase Orders form.
2. Select the purchase order for which to create new parts, and then click the Parts tab.
3. Click Create Part. The system automatically populates Part with a number that starts with N. Enter a description of the part in the adjacent field.
4. Type—Select the type of materials to order.
5. Purchase Qty. (UOP)—Enter the amount and UOP in which the supplier provides the part.
6. Requested Qty. (UOM)—Enter the amount in which you receive the part to stock. The system automatically populates the UOM.
7. Price—Enter the price of a single part and the currency you use to purchase the part.
8. Work Order-Activity—Enter the work order and activity if you are ordering this item for a work order activity. The system automatically populates Type with Direct Purchase.
9. Tax Code—Enter any additional taxes to apply to the part line as necessary.
10. Status—Select the status of the part line.
11. Qty. per UOP—Enter the conversion factor.

**Note:** For example, if the supplier's UOM for the part is a case of 12 parts but your UOM for the part is each, Purchase Qty. (UOP) will be 1 for one case, but Requested Qty. (UOM) will be 12 (1 case = 12 parts). If you enter 2 for the Purchase Qty. (UOP), the system uses Qty. per UOP to update the Requested Qty. to 24.

12. Due Date—Enter the expected arrival date of the items.
13. Track by Asset—The system displays whether or not the part is tracked as an asset.
14. Click Submit.

**Note:** To add an iProcure part, click Add Parts (iProcure Items). To update iProcure items in the parts catalog, click Update iProcure Items. To view iProcure sync errors, click View iProcure Sync Errors.

Adding multiple parts to purchase orders

Select and retrieve multiple parts for purchase orders.

To add multiple parts to purchase orders:

1. Open the Purchase Orders form.
2. Select a purchase order for which to add multiple parts, and then click the Parts tab.
3. Click Select Parts.
4. Select—Select the parts to add to the purchase order.
5. Purchase Qty.—Enter the purchase quantity parts for each selected part.
6. Click Submit.

**Note:** Select Planned Part to add the parts to the WO-Activity as planned parts. Planned Part is available only when parts are defaulted as Direct Materials.
Adding iProcure part items to purchase orders

Add iProcure part items to purchase orders.

To add iProcure part items to purchase orders:

1. Open the Purchase Orders form.
2. Select the purchase order to which to add iProcure part items, and then click the Parts tab.
   
   **Note**: The purchase order must have a status of Unfinished to add iProcure part items.
3. Click Add Parts (iProcure Items).
4. Enter the Part #.
5. Select the item, and then enter the number of items.
6. Click Save Record. The system adds the item to the Shopping Cart.
7. Click Add Parts (iProcure Items). The system adds the iProcure part item to the selected purchase order, and then updates the supplier's catalog. The system automatically populates iProcure Date Last Updated.

Updating iProcure items

Update iProcure items in the parts catalog.

To update iProcure items:

1. Open the Purchase Order form.
2. Select the purchase order, and then click the Parts tab.
3. Click Update iProcure Items. The system updates the parts catalog for PO suppliers and only parts on the selected PO record. The system automatically populates Gross Price, Lead Time, and iProcure Date Last Updated in the parts catalog for all suppliers.

Entering extra charges or discounts

Enter extra charges or apply special discounts to a purchase order line.

**Note**: You can only apply extra charges or discounts to a saved part line with a status of Unfinished.

To enter extra charges or discounts:

1. Open the Purchase Orders form.
2. Select the purchase order for which to enter extra charges or discounts, and then click the Parts tab.
3. Select the part line for which to enter extra charges or discounts.
4. Click Extra Charges/Discounts.
5. Click Add Charge/Discount. The system automatically populates Sequence Number based on the next incremental line number.
6. **Sequence Number**—Enter the sequence number of the part line.
7 Type—Select the type of charge/discount.

8 Amount—Enter the amount of the charge/discount. Enter a positive number for an extra charge or a negative number for a discount.

9 Percentage—Enter the percentage of the charge/discount. Enter a positive number for an extra charge or a negative number for a discount.

Note: You must enter either an amount or a percentage. You cannot enter both values.

10 Cumulative—Select to apply the charge/discount to the record after all other charges/discounts have been applied.

11 Include—Select to always include extra charges and discounts.

Note: If the installation parameter EXTCHG is set to Y, the system always includes extra charges and discounts; therefore, Include is selected and protected. If EXTCHG is set to M, Include is updateable. If EXTCHG is set to N, Include is unselected and protected.

12 Click Submit.

Note: To delete a charge/discount, select the charge/discount to delete, and then click Delete Charge/Discount. The system deletes the record and updates the Extra Charges/Discounts list.

13 Click Close.

Creating assets for purchase order items

Order parts tracked by asset that are not yet defined in the database. Create new asset records and associate them with purchase order items. The system only requires that you create assets for purchase order items if the installation parameter ASSETASS is set to P.

Define an asset for each individual part. For example, associate three assets with the order line if the ordered quantity is three. You cannot set the order status to Ready for printing (on the Purchase Orders form) until you associate all parts tracked by asset.

To create assets for purchase order items:

1 Open the Assets for PO form.

2 Purchase Order-Line—Enter the purchase order and line number for which to create assets. The system automatically populates PO Org., Requisition, Store, Supplier, Part, Order Qty., and Price.

Note: You must create an asset for the total quantity of the asset-parts you order, e.g., if Order Qty. is 2, you must create only two asset lines. You cannot create more than two assets. If you create less than two assets, the purchase order cannot be approved.

3 Click Add Asset.

Note: If the ASSETASS installation parameter is set to R, you can add an asset if the purchase order has a status of Unfinished, Ready for Printing, or Approved. If the ASSETASS installation parameter is set to P, you can only add an asset if the purchase order has a status of Unfinished.
4 **Asset ID**—Enter a code identifying the asset, and then enter a description of the asset in the adjacent field. If you select an existing asset, the system automatically populates the asset ID description, **Department**, and **Asset Org.**

**Note:** If you do not specify an asset ID and the AUTOANUM installation parameter is set to YES, the system automatically generates an asset number after you save the record. You may also select an existing asset ID with a status of Awaiting Purchase. When you select an existing asset ID, the system automatically populates the asset ID description, **Type**, **Asset Org.**, and **Department**.

5 **Type**—Enter the type of the asset.
6 **Asset Org.**—Enter the organization of the asset.
7 **Department**—Enter the department responsible for the asset.
8 Click **Submit**.

**Note:** To remove an asset, select the asset to remove, and then click **Remove Asset**.

---

**Adding service details to purchase orders**

Add service details to purchase orders. Create a service line for a set quantity and certain number of hours and at a defined price and rate.

**Note:** You can only add service details to a purchase order if the status of the purchase order is Unfinished.

You can only modify service details if the service line status is Unfinished.

If the installation parameter POCURR is set to NO, the system copies the currency of the purchase order header to all purchase order lines and protects the **Currency**. The currency of the service lines must match the currency of the purchase order header. However, if the installation parameter POCURR is set to YES, the currency of the service lines may be different than the currency on the purchase order header.

If you have a preset monetary purchasing limit for entering purchase orders, you cannot save any amount that exceeds your limit.

To add service details to purchase orders:

1 Open the **Purchase Orders** form.
2 Select the purchase order to which to add service details, and then click the **Services** tab. The system automatically populates **Type**, **Status**, the currency, and **Due Date**.
3 Click **Add Service Line**.
4 **Type**—Select one of the following service details options:
   - **Fixed Price or Hours from Service**—Select if the service line references a work order activity that is flagged for external service. If you select **Fixed Price or Hours from Service**, you must enter a **Work Order-Activity** or create a work order or work order activity.
   - **Contractor Hire**—Select if the service line will be completed by contract. If you select **Contractor Hire**, you must enter a **Trade**. You cannot enter a **Work Order-Activity** if you select **Contractor Hire**.
5 **Status**—Select the status of the service line.

**Note:** Once you change the Status to a value other than Unfinished and the status of the purchase order header is Accepted, Cancelled, or Rejected, you cannot change the status back to Unfinished. If the service line is associated with a work order/activity with a project-budget, you must be an approver for the project-budget to approve the service line. However, if there are no users listed on the Authorizations page of the Projects form, every user can approve the line.

6 **Requisition-Line**—Enter a requisition and line to add services to the service line from an existing service requisition.

**Note:** If you manually enter a Requisition, the system automatically populates the line number if there is only one line that meets the lookup requirements on the requisition and if the line is valid. If there are multiple lines that meet these criteria on the requisition, the system leaves the field null. If the selected Requisition–Line contains parts related to a multiple equipment work order, then the system populates Work Order–Activity, Equipment, Equipment Org., and Related Work Order from the requisition/line.

7 **Work Order-Activity**—Enter the work order number and activity if the service line is designated for external service. If there is no work order or activity assigned to the service line, click Create Work Order/Activity. The system creates a new work order number and/or activity. Modify the work order on the Work Orders form, and then modify the activity on the Activities tab of the Work Orders form.

**Note:** If you manually enter a Work Order-Activity, the system automatically populates the line number if there is only one line that meets the lookup requirements on the work order/activity and if the line is valid. If there are multiple lines that meet these criteria on the work order/activity, the system leaves the field null.

You can only add service details to a purchase order that is associated with a work order-activity with a status of Completed.

You cannot create a multiple equipment work order on the Services page; however, if the selected Work Order–Activity is a multiple equipment work order, the system enables Equipment and it is required.

8 **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:

- Enter a specific equipment to which to distribute the cost of the service.
- Enter All Equipment to evenly distribute the cost of the service to each equipment record on the work order.
- Enter WO Header Equipment to distribute the cost of the service to the equipment on the work order header only.

**Note:** When associating an order line with a multiple equipment work order, the system copies the purchase order line to the parent multiple equipment work order activity only. The system does not populate the purchase order line for the related work order activities.

9 **Trade**—Enter a trade if the service will be contracted.

10 **Task**—Enter a task if the service will be contracted. The system automatically populates Trade, Hours Requested, Price, and the currency.
11 Hours Requested—Enter the number of hours required to perform the service.
12 Price—Enter the cost of the service, and then enter the currency in the adjacent field.

*Note:* If the POCURR installation parameter is set to YES, you can change the currency.

13 Due Date—Enter the date by which the service must be complete.
14 Freeze Rate—Select to freeze the exchange rate throughout the purchase order approval process.

*Note:* If you do not select Freezed Rate, the system updates the exchange rate when you approve the purchase order.

15 Click **Submit**.

*Note:* To delete a service line, select the service line to delete, and then click **Delete Service Line**. You can only delete service lines from a purchase order if the status of the purchase order header is **Unfinished**.

Click **Add/Edit Comments** to add comments to the language.

**Associating clauses with purchase orders**

Include contract clauses in purchase orders. For example, state that for each day the contractor finishes ahead of schedule, he or she receives a bonus. Set up contract clauses before associating them with purchase orders.

To associate clauses with purchase orders:

1. Open the **Purchase Orders** form.
2. Select the purchase order for which to associate clauses, and then click the **Clauses** tab.
3. Click **Add Clause**.
   *Note:* You can only access the **Clauses** tab and add or delete a clause if the purchase order has a status of Unfinished.

4. **Order Clause**—Enter a predefined ISO clause or a user-defined clause. You can associate multiple clauses with a purchase order. The system automatically populates **Description**.
5. Click **Submit**.
   *Note:* To remove a clause, select the clause to remove, and then click **Remove Clause**.

**Copying purchase orders**

The copy purchase order feature copies a purchase order, including all details.

To copy purchase orders:

1. Create a purchase order.
2 Right-click, and then select **Copy Purchase Order**.
3 **New PO Description**—Enter a description for the new purchase order.
4 Select the record types to copy, and then click **Submit**. The system copies all purchase order details to the new purchase order.

   **Note:** Some exceptions apply to the header, service, part, and comment details copied. The system does not copy **Status** because all copied purchase orders are reset to **Status Unfinished**. Select **Use the Parts Catalog Price if no Contract Price Exists** to indicate the prices will be pulled from Parts Catalog if available.

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**Viewing transactions for purchase orders**

View receipt and return transactions for the selected purchase order.

To view transactions for purchase orders:

1. Open the **Purchase Orders** form.
2. Select the purchase order for which to view transactions, and then click the **Transactions** tab.
3. View the transactions information.

---

**Viewing tracking for purchase orders**

View tracking information for the selected purchase order. Tracking information is available only for purchase orders that have been transmitted to iProcure, and all information displayed on the page is from iProcure.

To view tracking for purchase orders:

1. Open the **Purchase Orders** form.
2. Select the purchase order for which to view tracking, and then click the **Tracking** tab.
3. View the tracking information.

---

**Viewing purchase order history**

View the purchase order histories of purchase orders using the **PO History** form. The **PO History** form enables you to select a specific purchase order and view the purchase order history for the current revision and all previous revisions of the purchase order.

The **PO History** form displays the same information and includes the same tabs as the **Purchase Orders** form.
To view purchase order history:

1. Open the **PO History** form.
2. Select the purchase order for which to view history, and then click the Record View, Parts, Services, and/or Clauses tabs to view different pages containing specific information related to the purchase order history. The system displays the corresponding page. See the following table for details about the information displayed on each page of the **PO History** form.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List View</td>
<td>Displays a list of all purchase orders</td>
</tr>
<tr>
<td>Record View</td>
<td>Displays detailed header information for the selected purchase order</td>
</tr>
<tr>
<td>Parts</td>
<td>Displays detailed information about parts on purchase order lines</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can also view comments and extra charges or discounts associated with the part. Click <strong>Comments</strong> to view comments. Click <strong>Extra Charges/Discounts</strong> to view extra charges or discounts.</td>
</tr>
<tr>
<td>Services</td>
<td>Displays any services added to the purchase order</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can also view comments associated with the service. Click <strong>Comments</strong> to view comments.</td>
</tr>
<tr>
<td>Clauses</td>
<td>Displays any contract clauses included on the purchase order</td>
</tr>
</tbody>
</table>

**Updating purchase orders**

Update purchase order details in a batch.

To update purchase orders:

1. Open the **PO Update** form.
2. Run the default dataspy. The system displays a list of purchase orders with a system status of "Unfinished" or "Awaiting Approval" in the editable grid.
3. Select the purchase orders to update and make changes to the following fields as necessary:
   - **Description**—Enter the description of the updates.
   - **Status**—Update the status of the purchase order.
Creating and using blanket orders

Use blanket orders to order a fixed number of items for a predetermined price or over a specific period of time. First, create blanket order headers, and then add line items. You can generate purchase orders from a blanket order, associate clauses with blanket orders, and set up user authorization for blanket order releases. When satisfied with the blanket order, approve the blanket order by changing the status to Approved. You must have authorization to create or update blanket orders; you must be a buyer for your organization with sufficient purchasing limit permissions to create blanket orders.

Creating blanket order headers

To create blanket order headers:

1. Open the Blanket Orders form.
2. Click New Record. The system automatically populates the blanket order description, Status, Date Created, and Number of Lines.
3. Organization—Enter the organization to which the blanket order belongs if you use multi-organization security. The system automatically populates Date Created.
4. Blanket Order—Enter a description of the blanket order in the adjacent field. The system assigns an order number after you save the record.
5. Status—Select the status value of the blanket order.
   
   Note: Your authorization level determines the values available for Status.
   
   You must add line items to the blanket order before you approve it. After lines are added to the blanket order, the system populates Remaining Value.

6. Store—Enter the storeroom to which to deliver parts.
7. Buyer—Enter the buyer responsible for the blanket order.
8. Maximum Value—Enter the maximum value for the blanket order. The system displays the total monetary amount released against the blanket order to date in Released Value. You cannot update this field.
Note: The **Maximum Value** of the header may be less than the total of all lines, but it cannot be less than the **Maximum Value** or **Price** of an individual line.

9 **Class**—Enter the class of the blanket order. The system automatically populates **Class Org.**

10 **StartDate** and **EndDate**—Enter the dates between which purchase orders can be generated from the blanket order. The system displays the number of purchase orders released from this blanket order in **Number Released**. You cannot update this field.

11 **Supplier**—Enter the supplier from whom to order the parts. The system automatically populates **Supplier Org.**, **Currency**, and **Exchange Rate**.

12 **Currency**—Enter the currency you use to purchase the parts.

13 **Exchange Rate**—Enter the current exchange rate.

Note: You can update **Currency** if there is an exchange rate defined for the currency and if the installation parameter POCURR is set to YES. If the installation parameter POCURR is set to NO, you can update the currency, and the system automatically populates **Exchange Rate** with 1. You can update **Exchange Rate** if the EXRTUPDT installation parameter is set to YES.

14 **Approve Order**—Select to automatically approve a purchase order generated from the blanket order.

15 Click **Save Record**.

Note: Click **Create Complete PO** to create a purchase order from the blanket order.

You cannot delete a blanket order. If you no longer need the blanket order, change the **Status** to **Cancelled**. Once cancelled, you cannot change the status of a blanket order.

Creating purchase orders from a blanket order

After you approve the blanket order, create a new purchase order from the blanket order.

Note: You cannot create a purchase order if the system date is outside the range of blanket order **StartDate** and **EndDate**; if the **Release Value** of the new purchase order will be greater than the **Remaining Value**; if the **Currency** for the blanket order is different than the currency on parts lines; if the purchase order value exceeds your purchase order limit permissions; if you are not an authorized user with specific permissions to create purchase orders; or if the purchase order value exceeds your authorization for purchase order approval.

To create purchase orders from a blanket order:

1 Open the **Blanket Orders** form.

2 Select the blanket order from which to create a purchase order, and then click the **Record View** tab.

3 Click **Create Complete PO**. The system automatically populates and protects **Store** if you entered a store on the **Blanket Order Record View** page.

4 **Originator**—Enter the employee requesting the blanket purchase order.

5 **Store**—Enter the storeroom to which to deliver parts.

6 Click **Submit**.
Adding part details to blanket orders

Set up items in the parts catalog before adding them to blanket orders.

**Note:** You can only add part details to a blanket order if the status of the blanket order is Unfinished. You can only modify part details if the part line status is Unfinished. Parts tracked as kit cannot be added to blanket orders.

To add part details to blanket orders:

1. Open the **Blanket Orders** form.
2. Select the blanket order to which to add part details, and then click the **Parts** tab. The system automatically populates the price currency and **Qty. per UOP**.
   **Note:** You can unhide **Line** and manually enter a new line number. Line sequences increase by the number entered for the installation parameter INCRLINO.
3. Click **Add Part Line**.
4. **Part**—Enter the part with which to associate the blanket order. The system automatically populates the part description, **UOM**, and **Price**.
5. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6. **Line**—Enter the line number of the blanket order.
7. **Purchase Qty. (UOP)**—Enter the amount and UOP in which the supplier provides the part.
8. **Price**—Enter the cost of a single part and the currency you use to purchase the part in the adjacent field.
9. **Qty. per UOP**—Enter the conversion factor.
   **Note:** For example, if the supplier's UOM for the part is a case of 12 parts but your UOM for the part is each, **Purchase Qty. (UOP)** will be 1 for one case, but the system will issue and measure 12 parts (1 case = 12 parts). If you enter 2 for the **Purchase Qty. (UOP)**, the system uses **Qty. per UOP** to update the number of parts measured and issued to 24.
10. **Exchange Rate**—Enter the current exchange rate.
11. Choose one of the following options:
   - **If the blanket order is for a maximum number of items**—Enter the number of items for **Maximum Qty**.
   - **If the blanket order is for a total monetary amount**—Enter the amount for **Maximum Value**.
     **Note:** You cannot enter a **Maximum Value** that exceeds the **Maximum Value** on the blanket order header.
12. **Inspection Required**—Select for inspections to be required.
13. **Commodity**—Enter the commodity associated with the blanket order.
14. **Supp. Catalog Reference**—Enter the reference number of the part, if the part is located in the supplier's catalog.
15. Click **Submit**.
Adding service details to blanket orders

Add service details to blanket orders. Create a service line for a set quantity and certain number of hours and at a defined price and rate.

**Note:** You can only add service details to a blanket order if the status of the blanket order header is Unfinished.

You can only modify service details if the blanket order status is Unfinished.

If the installation parameter POCURR is set to NO, the system copies the currency of the blanket order header to all blanket order lines and protects Currency. The currency of the service lines must match the currency of the blanket order header. However, if the installation parameter POCURR is set to YES, the currency of the service lines may be different than the currency on the blanket order header. Contact your system administrator for more information.

To add service details to blanket orders:

1. Open the **Blanket Orders** form.
2. Select the blanket order to which to add service details, and then click the **Services** tab. The system automatically populates **Line**, **Type**, **Status**, the currency, and **Exchange Rate**.
3. Click **Add Service Line**.
4. **Line**—Enter a line number.
5. **Type**—Select one of the following service detail options:
6. **Fixed Price or Hours from Service**—Select if the service line references a work order activity that is flagged for external service.
   **Note:** **Hours Requested** for a line type of **Fixed Price** must be 1.
7. **Contractor Hire**—Select if the service line will be completed by contract. If you select **Contractor Hire**, you must enter a **Trade**.
8. **Trade**—Enter a trade if the service will be contracted.
9. **Price**—Enter the cost of the service. The system automatically populates the currency of the price.
   **Note:** If the POCURR installation parameter is set to YES, you can change the currency. Contact your system administrator for more information.
10. **Exchange Rate**—Enter the exchange rate for the currency.
11. **Task Qty.**—Enter the amount of units of service, and then enter the unit of measure in the adjacent field.
12. **Task**—Enter a task if the service will be contracted. The system automatically populates **Price**, the currency, and the unit of measure. If the **Task** is associated with a **Trade** on the Task record, the system automatically populates **Trade**. Also, if **Hours Requested** has not been entered, the system automatically populates **Hours Requested** from the Task record’s **Estimated Hours**.
13. **Hours Requested**—Enter the number of hours required to perform the service.
14. **Delivery Address**—Enter the address to which to deliver any needed items.
15. **Maximum Hours**—Enter the maximum amount of hours allowed for the service.
   **Note:** **Maximum Hours** must be greater than or equal to **Hours Requested**.

Purchasing management
16 **Maximum Value**—Enter the maximum monetary value allowed for the service.

*Note:* You must enter either **Maximum Hours** or **Maximum Value**. You cannot enter both values. The **Maximum Value** of the line must be less than or equal to the **Maximum Value** of the header.

17 Click **Submit**. The system automatically populates **Number Released** with the number of times the service line has been released by the blanket order, **Released Hours** with the total number of released hours for the service line released to the blanket order, **Released Value** with the total monetary value of units released by the blanket order, and **Last Order** with the number of the last purchase order that was released for the service line.

*Note:* To delete a service line, select the service line to delete, and then click **Delete Service Line**. You can only delete service lines from a blanket order if the status of the blanket order header is Unfinished.

### Associating clauses with blanket orders

Associate existing clauses with blanket orders so that the printed purchase order includes the contract clauses.

*Note:* You can only associate clauses with a blanket order with a system status of Unfinished.

To associate clauses with blanket orders:

1. Open the **Blanket Orders** form.
2. Select the blanket order with which to associate clauses, and then click the **Clauses** tab.
3. Click **Add Clause**.
4. **Clause**—Enter the contract clause to add to the blanket order. The system automatically populates the clause description and **Organization**.
5. Click **Submit**.

*Note:* To remove a clause, select the clause to remove, and then click **Remove Clause**. You can only remove clauses from a blanket order with a system status of Unfinished.

### Associating purchase order terms with blanket orders

Associate existing purchase order terms with blanket orders to ensure correct purchase order activities.

*Note:* Depending on your system configuration, **Ship Via**, **Payment Terms**, **Freight Terms**, **FOB Point**, and **Payment Method** may not be displayed. Contact your system administrator for additional information.

To associate purchase order terms with blanket orders:

1. Open the **Blanket Orders** form.
2. Click **New Record**.
3 Enter the information as necessary to create a blanket order.

   Note: You must enter Supplier before clicking Default Terms.

4 Click Default Terms. The system automatically populates Ship Via, Payment Terms, Freight Terms, FOB Point, and Payment Method with the values entered on the Suppliers form.

5 Ship Via—Enter the manner in which the supplier ships the specific item.

6 Payment Terms—Enter the manner in which the supplier is paid for the purchase.

7 Freight Terms—Enter the manner in which the freight charges are paid and who pays them.

8 FOB Point—Enter where you take possession of the item.

9 Payment Method—Enter the method used to pay the supplier.

10 Click Save Record.

Defining blanket order user authorizations

Define which users can create purchase orders from blanket orders. Only users on the list of authorized users can create purchase orders from blanket orders. If the Users list is empty, then all users with the appropriate screen permissions (based on the user group of the user) will be able to create purchase orders from blanket orders.

To define blanket order user authorizations:

1 Open the Blanket Orders form.

2 Select the blanket order for which to define user authorizations, and then click the Users tab.

3 Click Add User.

4 User—Enter each user who can issue releases against the blanket order. The system automatically populates the user description.

5 Click Submit.

   Note: To remove a user, select the user to remove, and then click Remove User.

Creating partial order blanket orders

Create a partial order blanket order and indicate the quantities of the part or service to be added for each generated purchase order line.

   Note: You can only create partial order blanket orders when the blanket order has a system status of Approved and when there are no line-level errors.

To create partial order blanket orders:

1 Open the Blanket Orders form.

2 Select the blanket order from which to create a partial order, and then click the Partial Order tab. The system automatically populates Maximum Value, Released Value, and Remaining Value.
3 **Select**—Select to add the blanket order line item to the purchase order.

**Note:** You must select at least one blanket order line item to create a purchase order. To select all the blanket order line items at once, check **Select**. To unselect all the line items at once, uncheck **Select**.

4 **Purchase Qty.**—Enter the quantity of parts/hours of service to be purchased.

5 **Work Order**—Enter the work order to associate with the blanket order line.

6 **Activity**—Enter the activity to associate with the blanket order line.

**Note:** If the line type is SF (Fixed price) or ST (Hours from service), then **Work Order** and **Activity** are required.

7 **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:
   - Enter a specific equipment to which to distribute the cost.
   - Enter **All Equipment** to evenly distribute the cost to each equipment record on the work order.
     **Note:** The system does not allow you to select All Equipment for parts on the blanket order line that are tracked by asset.
   - Enter **WO Header Equipment** to distribute the cost to the equipment on the work order header only.

8 Click **Create Purchase Order**. Follow the steps for “Creating Purchase Orders from a Blanket Order.”

**Note:** You must select at least one blanket order line item to create a purchase order.

You cannot create a purchase order that exceeds your preset monetary limits for creating and/or approving purchase orders. You cannot create a purchase order from a blanket order with service lines without a work order.

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**Recording invoice vouchers**

Record invoice vouchers received from suppliers to verify invoices against purchase order-lines and received quantities. Create credit and debit notes to apply credits to invoices and inventory. Create non-purchase order invoice vouchers to record invoices for items or services received without associated purchase orders.

**Creating regular invoice vouchers**

Regular invoice vouchers are used to create a record of a supplier’s bill. Creating invoice vouchers creates a business process by which suppliers are paid for parts and services.
Regular invoice vouchers verify that the cost of the invoice lines matches the cost of the associated order lines within a specified range of tolerance. The range of tolerance can be based on an absolute dollar amount or on a percentage, as defined on the Organizations form. Specify Match Tolerance Absolute, Match Tolerance %, and Match Quantity Tolerance % to establish the amount or percentage allowed as the difference between the purchase order-line cost and the invoice voucher line cost when matching line costs. Upon approval of the invoice voucher, the system captures the price, freezes the exchange rate if foreign currencies are used, and updates prices.

Occasionally suppliers' prices for items vary, causing discrepancies between an invoice voucher and projected costs for that invoice.

**Note:** Set the MATCHAPP installation parameter to YES to enable the system to automatically assign the Approved status to vouchers matched by the invoice process. Contact your system administrator for more information.

**Creating invoice voucher headers**

Create invoice voucher headers for purchased materials.

**Note:** You cannot delete an invoice voucher unless the status is Unfinished or if it is an invoice voucher with lines associated.

To create invoice voucher headers:

1. Open the **Invoice Vouchers** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the invoice voucher belongs if you use multi-organization security.
4. **Invoice Voucher**—Enter a description of the invoice voucher in the adjacent field. The system automatically generates a voucher number when you save the record.
5. **Registration Date**—Enter the date of the registration of the invoice voucher.
   **Note:** **Registration Date** cannot be before **Invoice Date**.
6. **Status**—Select the status of the invoice voucher.
   **Note:** Your user authorizations determine the available statuses.
   **Note:** If lines have not been added to the invoice voucher, then the status of the invoice voucher can only be Unfinished or Cancelled. However, this does not apply to Non-PO invoice vouchers. Invoice vouchers with the type Invoice can only be approved after matching. Debit Note or Credit Note invoice vouchers can only be approved if the **Original Invoice Voucher** is approved and if the invoice voucher does not exceed your approval limits. If you update the status of the invoice voucher to Unfinished, every associated line will reset to Not Matched.
7. **Type**—Select the invoice voucher type. Choose one of the following options:
   - **Credit note**—Select to indicate a credit has been added to the invoice voucher.
   - **Debit note**—Select to indicate a debit has been added to the invoice voucher.
8 Supplier Invoice—Enter the supplier’s invoice number.
9 Invoice Date—Enter the supplier’s invoice date.
10 Supplier—Enter the supplier from whom the invoice has been received. The system automatically populates Supplier Org., Currency, and Exchange Rate.

**Note:** In order to enter a value in Supplier and Purchase Order, the supplier on the Purchase Order must be the same as the value entered in Supplier.

11 Currency—Enter the currency used for the invoice voucher.
12 Exchange Rate—Enter the exchange rate for the currency.
13 Class—Enter the class of the voucher. The system automatically populates Class Org.
14 Return—Select to indicate a return.
15 Original Invoice Voucher—Enter the original voucher. The system automatically populates Original Supplier Invoice.

**Note:** Invoice vouchers with the types Credit Note or Debit Note must enter an Original Invoice Voucher.

16 Purchase Order—Enter the purchase order from which to create voucher lines.

**Note:** You can choose to not enter a value in Supplier and instead only enter a Purchase Order. This restricts the lines of the invoice voucher to only the lines for the purchase order on the invoice voucher header. Therefore, Supplier, Supplier Org., Currency, and Exchange Rate will populate from the supplier of the purchase order.

You cannot enter a Purchase Order for Non-PO invoice vouchers.

17 Payment Due Date—Enter the date by which the invoice voucher is to be paid.

**Note:** Payment Due Date cannot be before Registration Date.

18 Pay To—Enter the supplier to whom to pay the invoice voucher.

**Note:** Pay To must be the same supplier or an associated child or parent of the supplier that was entered in Supplier.

19 Paid Date—Enter the date on which the invoice was actually paid.
20 Click Save Record.

**Note:** After the invoice voucher is approved, the system displays Approved By, and the purchase order line for each invoice voucher line is updated with the invoice voucher line’s invoice quantity and invoice value.

After costs have been added to the invoice voucher, the system displays Voucher Total.
Adding line items to invoice vouchers

Note: You cannot add line items to the invoice voucher unless the invoice voucher Type is Invoice, Debit Note, or Credit Note; Supplier is entered on the invoice voucher header; and Purchase Order is not entered on the invoice voucher header.

The Assign GL Codes, Extra Charges/Discounts, and Match hyperlinks are protected unless the invoice voucher type is Invoice.

To add line items to invoice vouchers:

1. Open the Invoice Vouchers form.
2. Select the invoice voucher to which to add line items, and then click the Lines tab.
3. Click Add Invoice Voucher Line. The system automatically populates Invoice Voucher Line and Status.
4. Invoice Voucher Line—Enter a line number.
5. Purchase Order-Line—Enter the purchase order and line number to invoice. The system automatically populates Qty. Invoiced, Qty. Returned, Price, Currency, Tax Code 1, Tax Code 2, Exchange Rate, Type, Work Order-Activity, Cost Code, Part/Trade, Ordered, Received, and Invoiced.
   
   If the work order associated with the selected Purchase Order-Line is a multiple equipment work order, then the system populates the Equipment, Equipment Org., and Related Work Order from the information on the purchase order line. The system distributes any invoice differences as defined by the purchase order line.
6. Qty. Invoiced—Enter the amount to be invoiced.
7. Qty. Returned—Enter the amount to be returned.
8. Price—Enter the unit price for parts or the hourly rate for services. The system automatically populates the currency of the price.
9. Tax Code 1 and Tax Code 2—Enter any additional taxes to apply to the line. The system adds the tax charges to the total for the invoice voucher line and displays the updated totals in Tax Amount and Line Total.
   
   Note: Tax codes do not affect the purchase order-line record.
10. Exchange Rate—Enter the exchange rate for the currency.
11. Click Match to simulate the voucher match process without actually changing the status of the header. This action verifies the following information:
   
   • Absolute tolerance and percentage have not been exceeded.
   • The voucher quantity does not exceed a specified percentage above the amount ordered.
   • The quantity invoiced does not exceed the quantity received.
   
   Note: To delete a line, select the line to delete, and then click Delete Invoice Voucher Line. You cannot delete an invoice voucher line unless the status of the invoice voucher header is Unfinished.
Creating costs for invoice vouchers

Create and edit costs for the invoice voucher header. The Extra Charges/Discounts button on the Lines page of the Invoice Voucher form applies costs to specific invoice voucher lines. The Costs page applies costs to the invoice voucher header.

**Note:** You cannot apply costs to the invoice voucher unless the status of the header is Unfinished.

To create costs for invoice vouchers:

1. Open the Invoice Vouchers form.
2. Select the invoice voucher for which to apply costs, and then click the Costs tab.
3. Click Add Cost.
4. **Type**—Enter the type of additional charge or discount to apply to the invoice voucher. The system automatically populates the type description. If you enter PRT (Pre tax extra charge/discount), the system enables Tax Code 1.
5. **Amount**—Enter an absolute value for the amount of the extra charge or discount to apply to the invoice voucher.
   
   **Note:** You must enter a negative value for discounts.
6. **Accounting Flexfield Desc.**—Enter the accounting flexfield description. The system automatically populates GL Code.
7. **Tax Code 1**—Enter the tax rate to be applied to the cost amount. If you enter Tax Code 1, the system enables Tax Code 2.
   
   **Note:** The system calculates Tax Amount and Line Total based on the selected tax code.
8. **Tax Code 2**—Enter the second tax rate to be applied to the cost amount.
   
   **Note:** If you enter Tax Code 2, the system applies each tax and then adds the amounts to calculate Tax Amount and Line Total.
9. Click Submit.
   
   **Note:** To delete a cost, select the cost to delete, and then click Delete Cost. You cannot delete a cost unless the status of the invoice voucher header is Unfinished.

Defining utility bills for invoice vouchers

Create and edit utility bill information for the invoice voucher header. The Utility Bills page applies costs to the invoice voucher header and allows you to calculate a daily rate for utility/energy consumption.

To define utility bills for invoice vouchers:

1. Open the Invoice Vouchers form.
2. Select a non-PO invoice voucher for which to apply utility bills, and then click the Utility Bills tab.
3. Click Add Utility Bill. The system automatically populates Line.
4 **Utility Bill Source**—Enter the utility bill source object. **Utility Bill Source** is the level at which the utility bill is recorded (usually building level). The system automatically populates **Utility Bill Source Org.** and **UOM**.

5 **Meter**—Enter the meter that is attached to the Utility Bill Level Object. The system automatically populates **Meter Org.**

6 **Commodity**—Enter the commodity that represents the type of energy being consumed, i.e. electricity or gas.

7 **UOM**—Enter the unit of measure of the usage of the utility bill.

8 **Cycle**—Enter the cycle for the utility bill.

9 **Rate Code**—Enter the code of the rate to charge for the utility bill.

10 **Correction Factor**—Enter the number for the correction factor. **Correction Factor** is a value the utility company sets to ensure proper usage calculation. This value will be used as a multiplier when calculating utility bill rates.

11 **From Date**—Enter the begin date of the billing period. The system automatically populates **To Date** with the same date.

12 **End Date**—Enter the end date of the billing period.

13 **Start Reading**—Enter the reading at the start of the utility bill period.

   **Note:** If you clear Start Reading, the system automatically clears **End Reading** and vice versa. It will not adjust **Usage** based on edits to either field.

14 **End Reading**—Enter the reading at the end of the utility bill period.

   **Note:** If you enter **End Reading** when **Usage** is null and **Start Reading** is not null, the system automatically populates **Usage** = **End Reading** − **Start Reading**.

15 **Usage**—Enter the usage for the utility bill period. If **Start Reading** is not null when you enter **Usage**, the system automatically populates **End Reading** = **Start Reading** + **Usage**.

16 **Total Bill Amount**—Enter the cost amount for the utility bill period. The system automatically populates **Currency**.

17 **Multiplier**—Enter a multiplier to calculate usage from the meter reading. This value will be used as a multiplier when calculating utility bill rates.

18 **Meter Type**—Select the type of meter for the utility bill period.

   **Note:** **Energy and Demand** measures KWh and kW.
   **Reactive Energy** measures kVARh to bill power factor less than 95%.
   **Energy, Demand, and Power Factor** measures all KWh, kW, and kVARh.

19 **Peak Demand**—Enter the peak demand for the utility bill period. The system automatically populates the peak demand **UOM**.

20 **Billed Demand**—Enter the demand rate billed for the utility bill period.

21 **Power Factor (%)**—Enter the power factor percentage of the commodity for the utility bill period.

22 **Service Charge**—Enter the monthly service charge for the utility bill period. The system automatically populates **Currency**.

23 **Unit Charge**—Enter the unit charge or rate being charged for the rate code for the utility bill period. The system automatically populates **Currency**.
24 Load Factor—Enter the load factor for the utility bill period.
25 Click Submit.

Note: To delete a utility bill, select the utility bill to delete, and then click Delete Utility Bill.

Viewing invoice voucher line item information

To view invoice voucher line item information:
1 Open the Invoice Lines per Buyer form.
2 Run the default Dataspy or create a personalized Dataspy to filter results by user.
   Note: Unlike other forms within the system, you must first run a Dataspy to view invoice voucher line item information.
3 View the invoice voucher line item information.

Booking invoice allocations

Book invoice allocations to assign costs to work orders invoice vouchers and invoice voucher lines.

To book invoice allocations:
1 Open the Invoice Allocations form.
2 Select the invoice number for which to book an allocation. The system populates the Invoice Allocation Details.
   The system automatically populates Total Unallocated Amount and Qty. to Allocate. The system calculates the Total Unallocated Amount based on the following formula:
   Total Unallocated Amount = Unallocated Qty. x Unallocated Unit Cost
3 Qty. to Allocate—Update the quantity to allocate if necessary.
   Note: If the Qty. to Allocate entered is greater than 0 but less than or equal to the Unallocated Qty., then the system will recalculate the Unallocated Qty. as the difference between the existing Unallocated Qty. and the Qty. to Allocate.
   If you enter a negative number for the Qty. to Allocate, then the system will create a correction transaction of type INVA and adds the absolute value of the negative value to Unallocated Qty. for the correction. For example, if you enter -2 as the Qty. to Allocate, then the system will add 2 to the Unallocated Qty.
   The INVADAYS installation parameter determines the number of days that invoice allocations can be booked for a completed work order. The system does not display work orders for which the completion date exceeds the number of days specified by the setting of the INVADAYS installation parameter.
4 Work Order-Activity—Enter the work order and activity for which to book the invoice allocation.
Note: If you select a work order with a system work order type of IS (Direct issue), then the system clears and protects Activity. No Activity is required for the work order type IS.

If you manually enter a Work Order of a type other than IS, the system will automatically populate the Activity from the work order if there is only one activity on the work order.

The system enables you to search for all transactions associated with a multiple equipment work order by defining a Quick Filter on the Work Order lookup using Parent Work Order as part of the filter criteria.

5 Click Submit. The system creates an invoice allocation transaction against the work order.

Note: Upon saving the invoice allocation, the system deactivates the invoice allocation if the Unallocated Qty. is zero as a result of the allocation.

To activate an inactive invoice line, select the invoice line to activate, and then click Activate Line. The system activates the line and selects Active.

To inactivate an invoice line, select the invoice line to inactivate, and then click Inactivate Line. The system inactivates the line and unselects Active. The system also clears and protects the Qty. to Allocate, Work Order, and Activity for the selected invoice line.

Defining requests for quotations

Requests for quotations (RFQs) are records of parts and services that are presented to suppliers to solicit bids on pricing. Define request for quotation information before submitting requests to suppliers.

To define requests for quotations:

1 Open the Request for Quotation form.
2 Click New Record. The system automatically populates Currency, Requested Response Date, Created By, and Requested Date.
3 Organization—Enter the organization to which the request for quotation belongs if you use multi-organization security.
4 RFQ description—Enter a description of the request for quotation.
   Enter the RFQ Details:
5 Status—Choose one of the following options:
   • Unfinished
   • Ready to Send
   • Sent to Supplier
      Note: When Status is set to Sent to Supplier, the system creates quotation records for each supplier on the Suppliers page and copies the parts and services to the Parts and Services pages, respectively, for the quotation record.
   • Receiving Quotations
      Note: System automatically assigns this Status when the first quotation is updated with pricing and its Status is changed to Received.
• All Quotations Received
• Awarded
  
  **Note:** If **Status** is set to **Awarded**, the system automatically populates **Awarded By** and **Awarded Date** and then calculates cost values.

• Cancelled

6 **Currency**—Enter the currency for the quotation.
7 **Store**—Enter the store to which the request for quotation applies.
8 **Requested By**—Enter the employee requesting quotations.
9 **Response Date**—Enter the date by which quotations should be received.
10 **Project**—Enter the project to which the request for quotation applies.
11 **Project-Budget**—Enter the project-budget to which the request for quotation applies.
   
   **Note:** Enter either **Project** or **Project-Budget**. Both fields cannot be populated simultaneously.
12 **Work Order**—Enter the work order associated with the request for quotation. The system automatically populates **Equipment**.
13 **Work Order-Activity**—Enter the work order-activity associated with the request for quotation.
   
   **Note:** Enter either **Work Order** or **Work Order-Activity**. Both fields cannot be populated simultaneously.

14 **Equipment**—Enter the equipment for which you are requesting a quotation if MEC work order is specified. The system automatically populates **Equipment Org.** and **Related Work Order**.
15 **Buyer**—Enter the buyer for the request for quotation.
16 **Delivery Address**—Enter the delivery address for the request for quotation.
17 **Class**—Enter the class for the request for quotation. The system automatically populates **Class Org.**

Enter the RFQ Print Options:

18 **Individual Lines**—Select to have the system create a line for each line listed.
19 **Sum Quantities with Earliest Due Date**—Select to have the system create quotation lines for each part and each trade-task combination assigning the earliest **Due Date** for the grouping.
20 **Sum Quantities by Due Date**—Select to have the system create quotation lines for each part and trade-task combination grouping by **Due Date**.
21 **Auto-print RFQ**—Select to print the record automatically when **Status** is **Sent to Supplier**.

Enter the RFQ Terms:

22 **Ship Via**—Enter the ship via code for the request for quotations.
23 **Payment Terms**—Enter the payment terms for the request for quotations.
24 **Freight Terms**—Enter the freight terms for the request for quotations.
25 **FOB Point**—Enter the freight on board point for the request for quotations.
26 **Payment Method**—Enter the method of payment for the request for quotations.

Enter the Email Information:

27 **Email Subject Line**—Enter the email subject line.
28 **Email Body Text**—Enter the email body text.
29 Click **Save Record**.

**Calculating costs for RFQs**

To calculate cost values for RFQs that have Awarded lines:

1. Open the **Request for Quotation** form.
2. Select the record for which to calculate costs, and then click the **Record View** tab.
3. Click **Calculate Costs**.
   
   The system automatically populates the following:
   
   - **Part Lines**—Count of part lines awarded on the Selections page
   - **Service Lines**—Count of service lines awarded on the Selections page
   - **RFQ Lines**—Count of awarded lines on the Selections page
   - **Total Tax**—Total tax on the awarded RFQ Lines (Parts and Services) on the Selections page
   - **Total Part Value**—Total price of all awarded part lines with positive part line totals
   - **Total Service Value**—Total price of all awarded service lines on the Selections page
   - **Total RFQ Value**—Total value based on the following equation:
     
     \[
     \text{Total Part Value} + \text{Total Service Value}
     \]
   - **Date Last Refreshed**—Date and time calculations were refreshed

**Defining clauses for RFQs**

To define clauses for RFQs:

1. Open the **Request for Quotation** form.
2. Select the record for which to define clauses, and then click the **Clauses** tab.
3. Click **Add Clause**.
4. **RFQ Clause**—Enter the purchasing clause to be associated with the RFQ. The system automatically populates the RFQ description.
5. Click **Submit**.

**Associating parts with RFQs**

To associate parts with RFQs:

1. Open the **Request for Quotation** form.
2. Select the record for which to define parts, and then click the **Parts** tab.
3 Click **Add Part Line**.
4 **Manufacturer**—Enter the manufacturer of the part.
5 **Manufacturer Part Number**—Enter the manufacturer part number.
6 **Part**—Enter the part, and then enter the part description in the adjacent field. The system automatically populates **Part Org.**, **Part Description**, **UOM**, **Inspection**, **Tracked by Asset**, **Preferred Supplier**, **Preferred Supplier Org.**, **Preferred Supplier description**, and **Requested Qty**.
7 **Part Org.**—Enter the organization for the part.
8 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
9 **Type**—Choose one of the following options:
   • **PD (Direct Materials)**
   • **PS (Stock Items)**
   • **RE (External Repair)**
10 **Line**—Enter the line number for the part.
11 **Requested Qty.**—Enter the number of units requested for the part.
12 **Due Date**—Enter the date the parts are due.
13 **Delivery Address**—Enter the address to which the parts should be delivered.
14 **Inspection**—Select to request a part inspection.
15 **Track by Asset**—Select to track parts.
16 **Work Order-Activity**—Enter the work order and activity for which the part is needed.
17 **Comments**—Enter any additional comments regarding the service.
18 Click **Submit**.

Creating parts

To create parts for RFQs:

1 Open the **Request for Quotation** form.
2 Select the record for which to define parts, and then click the **Parts** tab.
3 Click **Add Part Line**. The system automatically populates **Line**, **Type**, **Due Date**, and **Delivery Address**.
4 Click **Create Part**.
5 **Part Org.**—Enter the organization for which to create a part.
6 **UOM**—Enter the unit of measure for the part.
7 **Requested Qty.**—Enter the number of units requested for the part.
8 Click **OK**.
Selecting multiple parts

Select and retrieve multiple parts to be associated with an RFQ.

To select multiple parts for an RFQ:

1. Open the Request for Quotation form.
2. Select the record for which to add multiple parts, and then click the Parts tab.
3. Click Select Parts.
4. Select the parts to add to the RFQ, and then click Submit.
   
   Note: Requested Quantity and Due Date can be entered on the popup or on the Parts page.

Retrieving WO parts

To retrieve work order parts:

1. Open the Request for Quotation form.
2. Select the record for which to retrieve parts, and then click the Parts tab.
3. Click Add Part Line. The system automatically populates Line, Type, Due Date, and Delivery Address.
4. Click Retrieve WO Parts.
5. Select the parts to retrieve, and then click OK.

Selecting substitute parts

To select substitute parts for RFQs:

1. Open the Request for Quotation form.
2. Select the record for which to select substitute parts, and then click the Parts tab.
3. Click Add Part Line. The system automatically populates Line, Type, Due Date, and Delivery Address.
4. Click Select Substitute Part.
5. Select the part to substitute for the RFQ part, and then click OK.

Selecting items on RFQs

Select items on a request for quotation. You may award selected items on an RFQ, update the supplier part catalog with items on quotations, create or update a requisition, or create or update a purchase order.

To select items on RFQs:

1. Open the Request for Quotation form.
2 Select the record for which to select items, and then click the Selection tab.

   *Note:* The lines displayed are the received Quotation lines associated with the RFQ.

3 Select either **Parts** or **Services**. The system displays the parts or services.

4 Select items for the RFQ, and then choose one of the following options:

   * **Award Items**—The system awards selected items to the quotation and others in the item group to **Not Awarded**.
     
     **Note:** System Status must be **Undecided**. Multiple items with the same Line may not be Awarded.

   * **Cancel Awarded Items**—The system cancels the **Award** status for selected items and changes the items’ System Status to **Undecided**.
     
     **Note:** System Status must be Awarded.

5 **Update Supplier Catalog**—The system updates the supplier parts catalog with data from selected items.

6 **Generate Requisition**—The system generates a requisition for selected items.

7 **Generate POs**—The system generates purchase orders for selected items.

8 **View Totals for All Suppliers**—The system displays totals by supplier in view-only mode.

### Updating a supplier catalog

To update a supplier catalog:

1 Open the **Request for Quotation** form.

2 Select the record for which to update a supplier catalog, and then click the Selection tab.

3 Select **Parts**.

4 Select items for which to update the supplier catalog, and then click **Update Supplier Catalog**.

5 Select the part with which to update the supplier catalog, and then click **Update**.

   **Note:** If the item type is parts, the system inserts a Parts Catalog Record for the selected supplier.

### Generating requisitions for RFQs

To generate requisitions for RFQs:

1 Open the **Request for Quotation** form.

2 Select the record for which to generate a requisition, and then click the Selection tab.

3 Select either **Parts** or **Services**.

4 Select the items for which to generate a requisition, and then click **Generate Requisition**.

5 **Create Requisition**—Select to create a new requisition.

6 **Requisition Description**—Enter a description for the requisition.
Purchasing management

7 **Store**—Enter the store to which the requisition should be issued.
8 **Requested By**—Enter the name of the employee requesting the requisition.
9 **Default Approver**—Enter the name of the employee who should approve the requisition.
10 **Add to Existing Requisition**—Select to add items to an existing requisition.
11 **Buyer**—Enter the name of the employee purchasing the items.
12 **Planned Part**—Select to add the item to the selected WO-Activity if the item is not already a Planned Part.
13 **Print Requisition**—Select to print the requisition to which the quotation lines have been associated when the system generates or updates the requisition.
14 Click **Generate**.

Generating POs for RFQs

To generate purchase orders for RFQs:

1 Open the **Request for Quotation** form.
2 Select the record for which to generate a purchase order, and then click the **Selection** tab.
3 Select either **Parts** or **Services**.
4 Select the items for which to generate a purchase order, and then click **Generate POs**.
5 **Create PO**—Select to create a new purchase order.
6 **PO Description**—Enter a description for the purchase order. You must enter a PO Description if **Use Quotation Description** is unchecked.
7 **Store**—Enter the store to which the purchase order should be issued.
8 **Originator**—Enter the name of the employee generating the PO.
9 **Delivery Address**—Enter the address to which the items should be delivered.
10 **Use Quotation Description**—Select to use the quotation description as the PO description.
11 **Buyer**—Enter the name of the employee purchasing the items.
12 **Add to Existing PO**—Select to add items to an existing purchase order.
13 **Planned Part**—Select to add the item to the selected WO-Activity if the item is not already a Planned Part.
14 **Print PO**—Select to print the purchase order(s) to which the quotation lines have been associated when the system generates or updates the purchase order(s).
15 Click **Generate**.

*Note:* The system generates a separate purchase order for each supplier.

Viewing totals by supplier

To view totals by supplier:

1 Open the **Request for Quotation** form.
2 Select the record for which to view totals, and then click the **Selection** tab.
3 Click **View Totals for All Suppliers**.
4 View the totals by supplier information.

### Defining suppliers for RFQs

To define suppliers for RFQs:

1 Open the **Request for Quotation** form.
2 Select the record for which to define suppliers, and then click the **Suppliers** tab.
3 Click **Add Supplier**.
4 **Supplier**—Enter the supplier. The system automatically populates the supplier description.
5 Click **Save Record**.

### Defining services for RFQs

Define services for RFQs. The system copies values to each new part line.

To define services for RFQs:

1 Open the **Request for Quotation** form.
2 Select the record for which to define services, and then click the **Services** tab.
3 Click **Add Service Line**. The system automatically populates **Line**, **Type**, and **Delivery Address**.
4 **Work Order-Activity**—Enter the work order and activity for the service.
5 **Equipment**—Enter the equipment to be used for the service if work order is MEC. The system automatically populates **Equipment Org.**, **Project-Budget**, **Related Work Order**, and **Department**.
6 **Line**—Enter the line number for the service.
7 **Type**—Choose one of the following options:
   - **ST (Hours From Service)**
   - **SF (Fixed Price Service)**—The system protects **Trade** and **Task**, sets **Hours Requested** to 1 and protects the field.
   - **SH (Contractor Hire)**—The system clears and protects **Work Order**, **Activity**, **Equipment**, **Equipment Org.**, **Related Work Order**, **Department**, **Project**, and **Budget**, makes **Trade** required, and makes **Task** optional.
8 **Trade**—Enter the trade associated with the service.
9 **Task**—Enter the task for the service. The system automatically populates **Trade**, **UOM**, **Hours Requested**, and **Task Qty**.
10 **Task Qty**—Enter the number of units required for the service.
11 **Hours Requested**—Enter the number of hours necessary to perform the service.
12 Due Date—Enter the date by which the service should be complete.
13 Delivery Address—Enter the location for the service.
14 Comments—Enter any additional comments regarding the service.
15 Click Submit.

Retrieving WO services for RFQ service
When retrieving WO services for RFQ service, the system copies values to each new part line.
To retrieve work order services for RFQ service:
1 Open the Request for Quotation form.
2 Select the record for which to define services, and then click the Services tab.
3 Click Add Service Line. The system automatically populates Line, Type, and Delivery Address.
4 Click Retrieve WO Services.
5 Select the services to add to the RFQ, and then click OK.

Copying RFQs
The copy RFQ feature copies an RFQ, including all details.
To copy RFQs:
1 Create an RFQ.
2 Right-click, and then select Copy RFQ.
3 New RFQ Description—Enter the description for the new RFQ.
4 Due Date—Enter the due date for the new RFQ.
5 Select the record types to copy, and then click Submit. The system copies all RFQ details to the new RFQ.
   Note: Some exceptions apply to the header, service, part, and comment details copied.

Editing quotations
The system automatically creates a quotation record when a quotation is received via an RFQ and the RFQ header status is changed to Sent to Supplier. Update the record details as long as the quotation is in the status of Unfinished.
To edit quotations:
1 Open the Quotations form.
2 Select the quotation to edit, and then click the Record View tab.
3 Quotation Description—Enter a description for the quotation.
4 Status—Choose one of the following options:
   - Unfinished
   - Received
   - Cancelled

5 Currency—Enter the currency accepted by the supplier for this quotation.

Enter the Supplier Contact Info details:

6 Contact Name—Enter the name of the individual to contact for the supplier.
7 Telephone—Enter the telephone number for the supplier.
8 Fax Number—Enter the fax number for the supplier.
9 E-mail Address—Enter the e-mail address for the supplier.

Note: If you change any contact information on this form, the system updates the contact information for the associated supplier on the Suppliers page of the RFQ form.

10 Click Save Record.

Defining services price information for quotations

Edit services information on a quotation.

To define services price information for quotations:

1 Open the Quotations form.
2 Select the quotation for which to define services, and then click the Services tab. The system automatically populates Type, WO-Activity, Task, Trade, Hours Requested, and Due Date.
3 Not Offered—Select if the service is not offered by the supplier.
4 Price—Enter the price of the service, and then update the currency of the price in the adjacent field.
5 Exchange Rate—Enter the exchange rate for the currency.
6 Freeze Rate—Select to set the Exchange Rate as permanent.
7 Delivery Date—Enter the requested delivery date for the service.
8 Tax Code—Enter the tax code that applies to the service.
9 Tax Code 2—Enter a secondary tax code that applies to the service.

Note: If there are two tax codes, the system calculates the total tax based on the two tax codes entered by adding the amount to be taxed for each code to the price of the service.

10 Click Submit.
Defining parts price information for quotations

Edit parts information on a quotation.

To define parts price information for quotations:

1. Open the **Quotations** form.
2. Select the quotation for which to define parts, and then click the **Parts** tab. The system automatically populates **Response Date**, **Part**, **Part Description**, **Part Org.**, **Line**, **Type**, **Inspection**, **Track by Asset**, **Work Order Details** information, **Purchase Quantity**, **Part Quantity**, **Due Date**, **Delivery Address**, **Contract**, **Total Tax Amount**, and **Part Line Total**.

   **Note**: If there is an active, approved contract for the selected supplier and store defined on the RFQ header, the system displays the contract for the selected part. The part exists on the **Parts** page of the **Contracts** form.

3. **Supp. Catalog Reference**—Enter the associated supplier catalog information for the part.
4. **Lead Time (Days)**—Enter the necessary lead time for the part.
5. **Not Offered**—Select if the part is not offered by the supplier.
6. **Purchase Qty. (UOP)**—Enter the unit of measure for the part.
7. **Price**—Enter the price of the part, and then update the currency of the price in the adjacent field.
8. **Exchange Rate**—Enter the exchange rate for the currency.
9. **Freeze Rate**—Select to set the **Exchange Rate** as permanent.
10. **Qty. per UOP**—Enter the number of parts per unit of measure.
11. **Delivery Date**—Enter the requested delivery date for the part.
12. **Tax Code**—Enter the tax code that applies to the part.
13. **Tax Code 2**—Enter a secondary tax code that applies to the part.

   **Note**: If there are two tax codes, the system calculates the total tax based on the two tax codes entered by adding the amount to be taxed for each code to the price of the part.

14. Click **Submit**.
Managing work involves creating, planning, and scheduling work orders. The work management life cycle begins when a person, department, or company identifies a work order that the maintenance department must complete. Before using the work management module, define initial work information such as supervisors, permits, qualifications, trades, employees, shifts, tasks, tools, material lists, and VMRS codes.

You may create standard work orders, and then apply the information from standard work orders to regular work orders. Next, create regular work orders to repair broken equipment, modify equipment to meet safety and environmental standards, perform work orders during a normal workday, and record information concerning equipment problems. Enter header information on the Work Order Record View page, and then add activities to the work order, schedule labor, associate qualifications with work order activities, book labor and vendor hours, associate parts, enter meter readings, create child work orders, add permits, and request tools as necessary. You may also view the status of work orders and view work order information such as work order cost and service request details. Finally, close the work order after the work is complete.

Create preventive maintenance (PM) work orders to generate periodic work orders for specified frequencies or meter readings. PM work orders apply to single pieces of equipment or systems that include several pieces of equipment.

On the Work Order Scheduling form, you may view the current work order schedule, calculate labor availability, and view labor utilization. Schedule unscheduled or backlogged work orders. Reschedule work orders as necessary. Additionally, you can view work order comments, change the work order status, and freeze or unfreeze activity schedules. You may balance the workload on the WO Load Balancing form.

You may also create service requests using the work management module. Define initial service request information such as customers, properties, and service codes before creating service requests. Then, create service requests, assign personnel to service requests, and close service requests after the work is complete. You may also book hours, issue and return parts, and enter additional charges for service requests.

Defining initial work information

Define initial work information before using the work management module.
Defining supervisors

Define codes to represent employee supervisors.

To define supervisors:

1. Open the **Supervisors** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the supervisor belongs if you use multi-organization security.
4. **Supervisor**—Enter a unique code identifying the supervisor, and then enter a description of the supervisor in the adjacent field.
5. **Class**—Enter the class of the supervisor. The system automatically populates **Class Org**.
6. Click **Save Record**.

Defining permits

Define permits to link safety and permitting information to equipment, locations, categories, PM schedules, standard work orders and work orders. For example, you may define a "hot" work permit regarding welding in a restricted area; a "confined space entry" permit when workers must complete the work in an enclosed production space such as a tank or vessel; or a "lockout-tagout" permit when the equipment involved must be cut off from operational power supplies.

**Note:** Define equipment, locations, categories, PM schedules, standard work orders and work orders before associating permits with these. Describe any necessary permit information and instructions on the **Permit Body** tab.

To define permits:

1. Open the **Permits** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the permit belongs if you use multi-organization security.
4. **Permit**—Enter a unique code identifying the permit, and then enter a description in the adjacent field. Leave it blank and the system assigns an identifying code.
5. **Status**—Select the status of the permit to work, e.g. select **Unfinished** if the permit to work is not yet finished.
6. **Class**—Enter the class of the permit. The classes shown belong to the PERM entity. The system automatically populates **Class Org**.
7. **Auto Create PTW**—Select to automatically the permit to work.
8. **PTW Type**—Select the type of work to be performed on the permit, e.g., **Confined space entry** if the work to be performed must be completed in an enclosed space.
9. **Type of Work**—Select the type of work to be performed on the permit to work.
10. **Priority**—Select the priority of the work to be performed on the permit to work.
11 Risk—Select the risk the permit to work poses to your organization.
12 LOTO Required—Select to require a lockout/tagout permit.
13 Isolation Type—Select the isolation type or method for isolating or disconnecting equipment (e.g., water valve) from its energy source in order that work can be performed without risk or injury.
14 Date Review Required—Enter the date a review is required for the permit.
15 Out of Service—If selected the permit will not display in the Permits lookups.
16 Click Save Record. The system automatically populates Created By and Date Created.

Note: To create a new revision of the permit, select a permit record for which to create a new revision, and then click Create New Revision.

Adding permit body comments
Add specific permit body comments, and then specify whether the comments should print with the specified record.

To add permit body comments:
1 Open the Permits form.
2 Select the permit for which to enter permit body comments, and then click the Permit Body tab.
3 Click Add Comment.
4 Language—Select the language of the comment.
5 Comments—Enter free-format text in the white space provided on the popup.
6 Print with Document—Select to print the comments on the associated report.
7 Click Save.

Deleting permit body comments
Delete permit body comments as necessary.

To delete permit body comments:
1 Open the Permits form.
2 Select the permit for which to delete permit body comments, and then click the Permit Body tab.
3 Click the header of the permit body comment to delete.
4 Click Delete.

Modifying permit body comments
Modify permit body comments as necessary.

To modify permit body comments:
1 Open the Permits form.
2 Select the permit for which to modify permit body comments, and then click the Permit Body tab.
3 Click the header of the permit body comment to modify.
4 **Modify the existing comments as necessary.**
5 Click **Save.** The system displays the modified comment on the Permit Body page.

**Note:** The system does not display a link for the original Created comment after the comment is modified. To preserve all comments, do not delete any previous comment text when modifying comments.

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### Defining qualifications

Define qualifications to establish a set of occupational standards and/or required job-related training for personnel, tasks, trades, and/or work order activities. After defining a qualification, associate the qualification with personnel, tasks, trades, and/or work order activities to establish your criteria for qualification enforcement of work activities. Qualification enforcement is determined by the WOQUAL installation parameter. See in the *Infor EAM System Administrator's Guide*.

If you are using qualification enforcement, you can only assign/schedule an employee who has the necessary qualification(s) to perform the work for which a qualification is required. If a qualification is associated with a trade, task, or work order activity, the employee must have that qualification on their personnel record. Employee qualifications are active if the employee has completed the necessary training course/requirements for the qualification and the qualification duration has not expired.

You can also define qualifications as training records to create a historical record of job-related training employees receive that does not need to be tracked for qualification enforcement.

To define qualifications:

1 Open the Qualifications form.
2 Click **New Record.**
3 **Organization**—Enter the organization to which the qualification belongs if you use multi-organization security.
4 **Qualification**—Enter a unique code identifying the qualification, and then enter a description of the qualification in the adjacent field.
5 **Class**—Enter the class of the qualification. The classes shown belong to the QUAL entity. The system automatically populates Class Org.
6 **Active**—Select to indicate whether the qualification is active.

**Note:** If you unselect Active for a qualification, then you can no longer associate the qualification with any subsequent personnel, tasks, trades, and/or work order activities. However, if the deactivated qualification is already associated with any personnel, tasks, trades, and/or work order activities, the qualification will still be required for any existing personnel, tasks, trades, and/or work order activities.

You can also select and unselect Active to temporarily activate and deactivate a qualification as necessary.
7 **Training Record**—Select to indicate whether the qualification is associated with a training record. By defining a qualification as a training record, the system does not track the qualification for qualification enforcement, and the qualification cannot be associated with tasks, trades, and/or work order activities.

8 Click **Save Record**.

### Defining trades

Define codes for the types of employees performing maintenance work. The system charges the cost of the trade, based on an hourly rate, back to the appropriate work order, asset, or project, ensuring correct cost accounting. A single trade may have multiple rates based on the type of work performed or the department associated with the trade for a specific work order. Define standard trade rates for suppliers on the **Supplier Rates** page of the **Trades** form. On the **Qualifications** page, you may associate qualifications with trades to establish the minimum qualifications for an employee belonging to a trade to perform work for which the trade is selected.

When scheduling work, you can select to assign the work to an employee and/or a trade. When booking hours for the work, the system calculates the labor cost of the hours to book based on the trade rate defined for either the employee or the trade rate defined for the trade. See "Defining trade rates" on page 361.

To define trades:

1. Open the **Trades** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the trade belongs if you use multi-organization security.
4. **Trade**—Enter a unique code identifying the trade, and then enter a description of the trade in the adjacent field.
5. **Class**—Enter the class to further subdivide the trade as necessary. For example, specify apprentice, journeyman, or master. The system automatically populates **Class Org**.
6. Click **Save Record**.

### Defining trade rates

Define rates for trades. When booking hours, the system first checks to see if an **Hourly Rate** is defined for the employee. If so, the hours are booked at that rate. However, if you have not defined trade rates for the employee, the system assigns the **Hourly Rate** defined for the trade on the trade Rates tab.

**Note:** Define trades on the **Trades** form. See "Defining trades" on page 361

To define trade rates:

1. Open the **Trades** form.
2. Select the trade for which to define rates, and then click the **Rates** tab.
3 Click Add Rate.
4 **Organization**—Enter the organization to which the rate belongs if you use multi-organization security.
5 **Type of Hours**—Enter hour occupation type for this work, e.g., select N for normal hours or O for overtime hours.
6 **Department**—Enter the department associated with this rate. If the rate applies to all departments, enter*.
7 **Hourly Rate**—Enter the hourly rate for this trade.
8 **Start Date** and **EndDate**—Enter the beginning and ending dates to which the rate applies.
   
   **Note:** Dates for the same trade type/department combination cannot overlap. For example, the MAINT department of ORG1 cannot have an overtime hourly rate of 20 to start 01-01-2004 and end 12-31-2004 and another overtime hourly rate of 30 to start 05-01-2004.
9 **Currency**. The system displays the currency of the organization.
10 Click Submit.
   
   **Note:** To delete a rate, select the rate to delete, and then click Delete Rate.

**Defining supplier trade rates**

First define trades and trade rates. Then, define standard trade rates for suppliers. You can also define rates on the Rates tab of the Suppliers form.

To define supplier trade rates:

1 Open the Trades form.
2 Select the trade for which to define supplier rates, and then click the Supplier Rates tab.
3 Click Add Supplier Rate.
4 **Supplier**—Enter the code identifying the supplier.
   
   The system automatically populates the description of the supplier, the **Organization**, the Supplier Org., and the currency.
5 **Hourly Rate**—Enter the hourly rate for the supplier trade.
6 **Organization**—Enter the organization for the supplier rate if the organization of the selected trade is common. The system displays only those organizations to which you have access. Otherwise, Organization defaults to the organization of the trade.
7 **Start Date** and **EndDate**—Enter the beginning and ending dates to which the rate applies.
8 Click Submit.
   
   **Note:** To remove a supplier rate, select the rate to remove, and then click Remove Supplier Rate.

**Associating qualifications with trades**

Associate qualifications with trades to establish the minimum qualifications for an employee belonging to a trade to perform work for which the trade is selected. Qualifications are defined on the Qualifications form. See "Defining qualifications" on page 360. After defining a qualification, you can associate it with
a trade. If an employee is associated with a trade for which there is a qualification, the employee must have an active record of that qualification on their personnel record. Employee qualifications are active if the employee has completed the necessary training course/requirements and the training has not expired as indicated by the **Start Date** and **Expiration Date** for the qualification on the employee’s personnel record. Employees can also be **Temporarily Disqualified** for qualifications as necessary on their personnel record.

If you have associated a qualification with a trade, and you associate a trade with a work order activity, you can only schedule employees associated with the selected trade who have the active qualifications required for that trade to be assigned/scheduled to perform the work.

**Note:** If you delete a qualification previously associated with a trade, then the deleted trade qualification will no longer be required for any subsequent work order activities to which the trade is assigned. Likewise, if you add a new qualification to a trade or update an existing qualification associated with a trade, the new/updated trade will not affect any existing work order activities to which the trade is assigned. However, the added/updated qualification will be required for any subsequent work order activities to which the trade is assigned, and the system displays a message indicating the number of open work orders for the trade.

To associate qualifications with trades:

1. Open the **Trades** form.
2. Select the trade with which to associate qualifications, and then click the **Qualifications** tab.
3. Click **Add Qualification**.
4. **Qualification**—Enter the qualification to associate with the trade. The system automatically populates the description of the qualification and the **Organization**.
5. Click **Submit**.

**Note:** To remove a qualification, select the qualification to remove, and then click **Remove Qualification**.

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**Defining employee information**

Define employee information to track full-time, part-time, and seasonal employees, and then define wage rates for employees to establish a specific hourly pay rate for an employee. Also, you may record labor availability exceptions for individual employees and for groups. You may associate qualifications with employee codes to establish qualifications for personnel. Finally, associate specific employee positions with certain functions on the **Types** page.

**Defining employee codes**

Define codes to represent individual employees, and then use the employee codes to track full-time, part-time, and seasonal personnel.

To define employee codes:
1 Open the Employees form.
2 Click New Record.
3 Organization—Enter the organization to which the employee belongs if you use multi-organization security.
4 Employee—Enter a unique code identifying the employee, and then enter a description of the employee code in the adjacent field.
5 Department—Enter the employee's department.
6 Out of Service—Select to prevent the employee code from being displayed in lookups.
   The system automatically populates Out of Service if the employee has been transferred to another organization.
   The system automatically populates Transferred To Employee and Transferred To Employee Org. when an employee is transferred between company organizations. See "Transferring employees between organizations" on page 368.
7 Class—Enter the class of the employee.
   The system automatically populates Class Org.
8 Trade—Enter the employee’s trade or craft.
9 Job Title—Enter the employee's job title.
10 Supervisor—Enter the employee's supervisor.
11 Associated User—Enter the Infor EAM Mobile user to associate with this employee.
12 Hire Date—Enter the date the employee was hired.
13 Date of Birth—Enter the employee's date of birth.
14 Terminated Date—Enter the date the employee is terminated.
15 Payroll No.—Enter a payroll number to which to associate the employee.
16 Security Badge No.—Enter the employee's security badge number.
17 License No.—Enter the employee’s driver’s license number.
18 Alias—Enter an alias to associate to the employee.
19 Notification Preference—Select the employee's preference for receiving notifications.
20 Enter the employee's Address, City, State, Zip Code, and Country.
21 Enter the employee's Emergency Contact and the Emergency Contact Phone No.
22 Enter the employee's Work Phone No., Mobile Phone No., and Home Phone No.
23 E-mail Address—Enter the employee’s e-mail address as necessary.
24 Fleet Customer—Enter the fleet customer with which to associate the employee.
25 URL—Enter the employee’s URL address.
26 Cost Code—Enter the fleet cost code with which to associate the employee.
   The system automatically populates Fleet Customer with the fleet customer associated with the Cost Code.
27 Customer—Enter the contract rental customer with which to associate the employee.
   The system automatically populates Customer Org.
28 Click Save Record.
   The system automatically populates Scheduling Session and Scheduling Session Type.
Defining wage rates for employees

Define wage rates for employees to establish a specific hourly pay rate for an employee. Rates for employees can be defined based on the employee’s level of experience, training, etc. Therefore, employees belonging to a designated trade can have different pay rates than other employees belonging to the same trade.

**Note:** You must designate a [Trade](#) for an employee when you define the employee code. See "Defining employee codes" on page 363.

When scheduling work, you can select to assign the work to an employee and/or a trade. When booking hours for the work, the system calculates the labor cost of the appropriate work order, asset, or project based on the hourly pay rate defined for the employee or the trade. Therefore, when booking hours, the labor cost for performing work can be based on the rate defined for either the employee or the trade.

To define wage rates for employees:

1. Open the [Employees](#) form.
2. Select the employee for whom to define wage rates, and then click the Rates tab.
3. Click [Add Rate](#).
4. **Organization**—Enter the organization to which the rate belongs if you use multi-organization security. The system automatically populates [Currency](#) with the currency of the organization.
5. **Type of Hours**—Enter the occupation type for this work, e.g., enter N for normal hours or O for overtime hours. The values listed belong to the OCTP entity.
6. **Department**—Enter the department associated with this rate. If the rate applies to all departments, enter *.
7. **Hourly Rate**—Enter the hourly rate for this employee.
8. **Start Date**—Enter the beginning date to which the rate applies.
   **Note:** Dates for the same type of hours/department/organization combination cannot overlap. For example, the MAINT department of ORG1 cannot have a **Hourly Rate** of 20 for overtime **Type of Hours** to start 01-01-2004 and end 12-31-2004 and another **Hourly Rate** of 30 for the overtime **Type of Hours** to start 05-01-2003.
9. **End Date**—Enter the ending date to which the rate applies.
   **Note:** **End Date** must be later than or equal to **Start Date**.
10. Click [Submit](#).
    **Note:** To delete a rate, select the rate to delete, and then click [Delete Rate](#).

Recording labor availability exceptions for individual employees

The system uses labor availability records to calculate the available hours for employees.

To record labor availability exceptions for individual employees:

1. Open the [Employees](#) form.
2 Click the **Availability Exceptions** tab.
3 Click **Add Exception**.
4 **Date**—Enter the date the employee will be absent. If the employee will be absent for multiple days, create multiple, separate date records.
5 **Hours**—Enter the number of hours for each day the employee will be present. If the employee is available for two hours, enter 2. You cannot enter more than 24 hours per day.
6 **Start Time**—Select the time work begins for the employee, even for days on which no work occurs, for each day in the shift. Enter the time in HH:MM format, e.g., 08:00 for 8:00 AM.
7 **Comments**—Enter any additional comments.
8 Click **Submit**.

   **Note:** To delete an exception, select the exception to delete, and then click **Delete Exception**.

### Recording labor availability exceptions for groups

Create labor availability exceptions for a group of employees. For example, create an exception for all employees on Christmas day.

**Note:** Create exceptions for individual employees using the **Availability Exceptions** page of the **Employees** form. See "Recording labor availability exceptions for individual employees" on page 365. When recording a labor availability exception for a group, the selected employee record is not affected.

To record labor availability exceptions for groups:

1 Open the **Employees** form.
2 Click the **Record View** tab.
3 Click **Create Group Exception**.
4 **Organization**—Enter the organization for which to record labor availability exceptions.
5 **Shift, Trade**, and/or **Department**—Enter the shift, trade, and/or department for which to record an exception.
6 **Start Date** and **EndDate**—Enter the starting date and ending date of the period for which to record an exception.
7 **Hours**—Enter the number of hours for each day the employees will be present. If the employees are available for two hours, enter 2. You cannot enter more than 24 hours per day.
8 **Employee**—Enter the employee for which to create multiple availability exceptions.
9 **Comments**—Enter a comment about the exception.

   **Note:** **EndDate** must be later than or equal to **Start Date**.

10 Click **Process**.
11 Click **Close**.
Associating qualifications with employee codes

Associate qualifications with employee codes to establish qualifications for personnel. By associating qualifications with an employee, you can establish the criteria to determine whether an employee is qualified to perform work.

Qualifications are defined on the Qualifications form. See "Defining qualifications" on page 360. After defining a qualification, you can associate the qualification with an employee record to add detailed information about the qualification, including whether the employee has completed the necessary training courses for a qualification, continuing education units (CEU), course cost, the duration of an employee’s certification/qualification period, and the dates by which the system validates whether an employee’s qualification is current or expired.

If you are using qualification enforcement for work, which is determined by the WOQUAL installation parameter, and an employee has not completed the necessary training courses required for a qualification, their certification/qualification is expired, or if you have disqualified them for any reason, you cannot schedule the employee to perform the work for which the qualification is required.

Note: You can also define qualifications as training records to create a record of any job-related training employees receive that does not need to be tracked for qualification enforcement. See "Defining qualifications" on page 360.

Associating qualifications with employee codes also enables you to create qualification history that allows you to maintain current qualification records, old or expired qualification records, and any subsequent re-qualifications for a qualification record. If you are re-qualifying a specific qualification record, simply enter new qualification dates for the existing code, or enter a new record with the same code as the existing qualification; however, you must enter new qualification dates for the re-qualification.

To associate qualifications with employee codes:

1. Open the Employee form.
2. Select the employee with which to associate qualifications, and then click the Qualifications tab.
3. Click Add Qualification.
4. Qualification—Enter the qualification to associate with the employee.
   The system automatically populates the description of the qualification and the Organization.
5. Start Date—Enter the date on which the duration of the qualification begins.
6. Duration—Enter the duration of the qualification, and then select the unit of measure for the duration of the qualification in the adjacent field.
   The system calculates the expiration date of the qualification for the employee based on the values entered for Start Date and Duration and then populates Expiration Date with the appropriate date. If no value is entered for Duration, you must enter the Expiration Date for the qualification manually.

Note: The system immediately validates whether the qualification is current based on the Start Date and Expiration Date for the qualification. If the qualification is current, the system selects Qualified. If the duration of the qualification has expired or is not current, the system automatically unselects Qualified.

The system unselects Qualified if you select Temporarily Disqualified. You can select to disqualify an employee’s qualification as necessary by selecting Temporarily Disqualified. Selecting Temporarily Disqualified overrides the qualification Expiration Date, and the qualification is no longer valid even if the qualification has not expired.
7 Comments—Enter comments about the qualification.
8 Course Start—Enter the start date of the course.
9 Course Finish—Enter the finish date of the course.
10 Course Cost—Enter the cost of the course, and then select the currency for the course cost in the adjacent field.
11 Completed—Select to indicate whether the employee has completed the course.
12 Certification Type—Select the type of certification. Certification types are linked to the certification type entity, for which you must define certification type codes as user codes on the System Codes form.
13 Certification Number—Enter the certification number for the qualification.
14 Hours—Enter the number of hours for the course.
15 CEU—Enter the number of continuing education units for the course.
16 Purpose—Enter the purpose of the course.
17 Click Submit.

   Note: To remove a qualification, select the qualification to remove, and then click Remove Qualification.

Associating employee types

Associate employee types with employees. An employee can have multiple employee types.

   Note: Define employee types on the System Codes form. See Defining system codes in the Infor EAM System Administrator's Guide.

To associate employee types:

1 Open the Employees form.
2 Select the employee with whom to associate the employee type, and then click the Types tab.
3 Click Add Type.
4 Type—Enter the type of the employee.
5 Click Submit.

   Note: To delete a type, select the type to delete, and then click Delete Type.

Transferring employees between organizations

Transfer employees from one organization to another organization within your company if you use multi-organization security.

When you transfer an employee between organizations, the system:

• Creates a new record with the employee's new organization, and a historical record with the employee's old organization.
• Automatically populates fields in the new employee record based on the historical record.
Validates information in the new employee record against the employee's new organization. If a conflict exists with the employee's **Class**, **Fleet Customer**, and **Cost Code**, the system clears these fields when you submit the transfer.

Additionally, when you transfer an employee into an organization of which he or she was previously a member, the system automatically updates fields in the new employee record based on the historical record for the original organization. The system copies child records and updates associated records.

To transfer employees between organizations:

1. Open the **Employees** form.
2. Select the employee to transfer, and then click the **Transfers** tab.
3. Click **Add Transfer**.
4. **New Organization**—Enter the organization to which the employee is being transferred.
   
   The system automatically populates **New Department** and **New Trade** if the employee's current department and trade are valid for the new organization.
5. **Historic Employee Code**—Enter a unique employee code to assign to the employee's historical record.
6. **New Department**—Enter the employee's new department.
7. **New Trade**—Enter the employee's new trade.
8. Click **Submit**.
   
   The system automatically populates **Transferred By** and **Date Transferred**.

Viewing outstanding issues for employees

View the list of parts issued to an employee that remain outstanding and have not been returned to stock.

To view outstanding issues for employees:

1. Open the **Employees** form.
2. Select the employee for which to view outstanding part issues, and then click the **Outstanding Issues** tab.
3. View the outstanding issues for employees.

Defining shift information

Define shifts, days per shift, and associate employees with shifts.

Defining shifts

Define the shifts used within the organization.

To define shifts:
1 Open the **Shifts** form.
2 Click **New Record**.
3 **Organization**—Enter the organization to which the shift belongs if you use multi-organization security.
4 **Shift**—Enter a unique code identifying the shift, and then enter a description of the shift in the adjacent field.
5 **Days in Rotation**—Enter the number of days in the shift.
   **Note:** **Days in Rotation** must be an integer between 1 and 999.
   If you edit the number of days in a rotation to a value less than the original value, one or more of the days may be deleted. For example, if you previously defined 5 as the number of **Days in Rotation** and then change the number to 4, one of the days will be deleted. See "Defining days for shifts" on page 370.
6 **Shift Start Date**—Enter the date the shift goes into effect. For example, if the workweek begins on Monday, ensure that this date is a Monday.
7 **Class**—Enter the class of the shift.
   The system automatically populates **Class Org**.
8 Click **Save Record**.

---

**Defining days for shifts**

Define the days for established shifts.

To define days for shifts:

1 Open the **Shifts** form.
2 Select the shift for which to define days, and then click the **Days** tab.
3 Click **Add Day**.
4 **Day Number**—Enter a new record for each day in the shift, numbered 1, 2, 3, etc.
5 **Number of Hours**—Enter the number of hours worked in the shift for each day. For days on which no work occurs, enter 0.
6 **Start Time**—Select the time work begins, even for days on which no work occurs, for each day in the shift. Enter the time in HH:MM format, e.g., 08:00 for 8:00 AM.
7 Click **Submit**.
   **Note:** To delete a day, select the day to delete, and then click **Delete Day**.

---

**Defining shift personnel**

Assign employees to a specific shift.

**Note:** Define employees on the **Employees** form. See "Defining employee codes" on page 363.

To define shift personnel:
1 Open the **Shifts** form.
2 Select the shift with which to associate the employee, and then click the **Employees** tab.
3 Click **Add Employee**.
4 **Employee**—Enter the employee working on the shift. The system automatically populates the description of the employee code.
5 **Start Date** and **EndDate**—Enter the first and last dates the employee works on the shift.
   Note: You can assign an employee to multiple shifts, but the dates of the shifts cannot overlap.
6 Click **Submit**.
   Note: To remove an employee, select the employee to remove, and then click **Remove Employee**.

---

**Defining crews**

Define and edit crew records.

To define crews:

1 Open the **Crews** form.
2 Click **New Record**.
3 **Crew**—Enter a unique code identifying the crew, and then enter a description in the adjacent field.
4 **Organization**—Enter the organization to which the crew belongs.
5 **Class**—Enter the class to which the crew belongs. The system automatically populates **Crew Org**.
6 **Supervisor**—Enter the supervisor of the crew.
7 **Out of Service**—Select to not display the crew.
8 Click **Save Record**.

---

**Adding employees to crews**

Add employees or update employee information for crews.

To add employees to crews:

1 Open the **Crews** form.
2 Select the crew to which to add employees, and then click the **Employees** tab.
3 Click **Add Employee**.
4 **Employee**—Enter the employee code. The system automatically populates **Name**.
5 **Start Date**—Enter the shift start date for the employee.
6 **End Date**—Enter the shift end date for the employee.
7 Click **Submit**.
Defining task information

A task is a predefined set of work order activity details that may be referenced on an activity of a work order, PM schedule, or standard work order to minimize data entry and ensure consistent planning for jobs.

Define the cost of the tasks for each supplier on the Suppliers page, and then define prices for common tasks on the Prices page if you are using multi-organization security. Finally, associate qualifications with tasks to establish the minimum qualifications for an employee to perform tasks associated with work on the Qualifications page.

To define task information:

1. Open the Tasks form.
2. Click New Record.
3. Organization—Enter the organization to which the task belongs if you use multi-organization security.
4. Task—Enter a unique code identifying the task, and then enter a description of the task in the adjacent field.
5. Class—Enter the class of the task. The classes shown belong to the TASK entity.
6. Trade—Enter the trade with which to associate the task.
7. Estimated Hours—Enter the number of hours estimated to complete the task.
8. People Required—Enter the number of people required to complete the task.
9. UOM—Enter the unit of measure for the task.
   
   Complete steps 10-16 only if you use the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS).
   
   Note: Depending on your system configuration, the VMRS-related fields may not be displayed. Contact your system administrator for more information.
   
   The system will copy the VMRS-related information you enter on this form to all standard work order activities, PM activities, and work order activities with the selected task.

10. Reason For Repair—Enter the reason the vehicle needs repair (Code Key 14).
11. Work Accomplished—Enter the work performed on the vehicle (Code Key 15).
12. Technician Part Failure—Enter the reason the technician or supplier thinks the vehicle failed (Code Key 18).
13. Manufacturer—Enter the Manufacturer/Supplier Code (Code Key 34) to associate with the vehicle.
14. System Level—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, needing repair (Code Key 31).
15. Assembly Level—Enter the VMRS code identifying the subsystem needing repair (Code Key 32). The values available are based on the system-level code.
16. Component Level—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.
   
   The system automatically populates VMRS Description based on the combination of the system, assembly, and component descriptions.
17 **Isolation Method**—Select if the task is used as part of a lockout/tagout procedure (LOTO).
18 **Out of Service**—Select to indicate the task should not display in lookups on the **Standard WO** form.
19 **Preferred Supplier**—Enter the preferred supplier for the task.
20 **Total Price**—Enter the total cost of the task per unit of measure.
   The system automatically populates **Hourly Rate** as the **Total Price** divided by the number of **Estimated Hours**, and the **Currency**.
21 **Commodity**—Enter the commodity to associate with the task.
22 **Buyer**—Enter the buyer (user) responsible for the task.
23 **Active Checklist**—Select if the task contains active checklist items.
24 **Performed By Required**—Select to indicate the identification of person performing the checklist on the task is required.
25 **Reviewed By Required**—Select to indicate the identification of the person reviewing the checklist results on the task is required.
26 **Revision Status**—Enter the revision status for the route.
   The system automatically populates **Revision**.
   **Note:** You can enter a **Revision Status** only if the PMRVCTRL installation parameter is set to Yes. Contact your system administrator for more information.
27 **WO Description**—Enter the description of the follow-up work order the system will create when checklist items are selected for follow-up.
28 **WO Type**—Select the work order type of the task checklist.
29 **WO Class**—Enter the work order class of the task checklist. The system automatically populates **WO Class Org**.
30 **WO Status**—Select the work order status of the follow-up work order.
31 **WO Priority**—Select the work order priority of the follow-up work order.
32 Click **Translate WO Description** to translate the follow-up work order description.
33 Click **Save Record**.

**Adding task instructions**

Add specific task instructions, and then specify whether the instructions should print with the specified record.

To add task instructions:

1 Open the **Tasks** form.
2 Select the task for which to enter instructions, and then click the **Instructions** tab.
3 Click **Add Instruction**.
   **Note:** Set HTMLCOMM to ON to view the HTML Editor Toolbar. Contact your system administrator for more information on installation parameters.
4 **Language**—Select the language of the instruction.
5 **Instructions**—Enter the comments on the form.

*Note:* Format comments using the HTML Editor Toolbar.

6 **Print with Document**—Select to print the instructions on the associated report.

7 Click **Save**.

*Note:* To delete an instruction, click **Delete Instruction**.

---

**Deleting task instructions**

Delete task instructions as necessary.

To delete task instructions:

1 Open the **Tasks** form.
2 Select the task for which to delete instructions, and then click the **Instructions** tab.
3 Click the header of the instruction to delete. At the bottom of the page, the system expands the Add/Edit Instructions section and automatically populates the selected task instructions.
4 Click \(\times\).

**Modifying task instructions**

Modify task instructions as necessary.

To modify task instructions:

1 Open the **Tasks** form.
2 Select the task for which to modify instructions, and then click the **Instructions** tab.
3 Click the header of the instruction to modify. At the bottom of the page, the system expands the Add/Edit Instructions section and automatically populates the selected task instructions.
4 **Modify the existing instructions as necessary.**
5 Click **Save**. The system displays the modified instructions on the **Instructions** page.

*Note:* The system does not display a link for the original Created instruction after the instruction is modified. To preserve all instructions, do not delete any previous instruction text when modifying instructions.

---

**Defining supplier task prices**

First define tasks. Then, define the cost of the tasks for each supplier.

To define supplier task prices:

1 Open the **Tasks** form.
2 Select the task for which to define supplier prices, and then click the **Suppliers** tab.
3 Click **Add Supplier**.

4 **Supplier**—Enter the code identifying the supplier. The system automatically populates the description of the supplier, the **Supplier Org.**, and the currency.

5 **Catalog Reference**—Enter the supplier’s catalog reference number.

6 **Price**—Enter the supplier’s cost and base currency for the task.

7 **Tax Code**—Enter the tax code for the task.

8 **Purchase UOM**—Enter the supplier’s unit of measure for the task.

9 **Qty. per UOP**—Enter the quantity per unit of purchase for the task if the purchase unit of measure is different from the inventory unit of measure.

10 **Lead Time (Days)**—Enter the average number of days that the supplier needs to provide the task.

11 **Expiration Date**—Enter the date the price expires.

12 **Preferred**—Select if the supplier is the preferred supplier for the task.

   **Note:** Only one supplier may be the preferred supplier for a specific task. If you have already selected **Preferred** for another supplier and then add an additional supplier and mark it as **Preferred**, the system clears this designation from the previous supplier and marks the new supplier as **Preferred**.

13 Click **Submit**.

   The system also automatically populates **Exchange Rate** as defined in the exchange rates table to convert the specified **Currency** to the **Local Currency**. The system populates **Local Price** by calculating **Price** divided by **Exchange Rate** divided by **Qty. per UOP**. The system populates **Date Last Updated** with the current system date.

   **Note:** To remove a supplier, select the supplier to remove, and then click **Remove Supplier**.

---

**Defining prices for common tasks**

With multi-organization security, you can centrally maintain prices of tasks used across all of your organizations.

**Note:** Define common task prices for organizations only if the MULTIORG installation parameter is set to YES. See *Defining installation parameters* in the *Infor EAM System Administrator's Guide*.

To define prices for common tasks:

1 **Open the Tasks form**.

2 **Select the task for which to define prices**, and then click the **Prices** tab.

3 **Click Add Price**.

4 **Organization**—Enter the organization for the task price.

   **Note:** If the organization of the selected task is common, the system displays only those organizations to which you have access. If the organization of the selected task is specific, the system displays only the organization of the task.

5 **Price**—Enter the price for the task per unit of measure.

6 **Click Submit**.
Associating qualifications with tasks

Associate qualifications with tasks to establish the minimum qualifications for an employee to perform tasks associated with work.

Qualifications are defined on the Qualifications form. See "Defining qualifications" on page 360. After defining a qualification, you can associate it with tasks.

When you select a task to which you have associated qualifications for a work order activity, you can only assign/schedule an employee that has an active record of the required qualification(s) for that task on their personnel record to perform the work order activity. Employee qualifications are active if the employee has completed the necessary training course/requirements and the training has not expired as indicated by the Start Date and Expiration Date for the qualification on the employee’s personnel record. Employees can also be Temporarily Disqualified for qualifications as necessary on their personnel record.

Note: If you delete a qualification previously associated with a task, then the deleted task qualification will no longer be required for any subsequent work order activities for which the task is selected. However, the deleted task qualification will still be required for any existing work order activities for which the task is selected.

Likewise, if you add a new qualification to a task or update an existing qualification associated with a task, the new/updated task will not affect any existing work order activities for which the task is selected. However, the added/updated qualification will be required for subsequent work order activities for which the task is selected, and the system displays a message indicating the number of open work orders for the task.

To associate qualifications with tasks:

1. Open the Tasks form.
2. Select the task with which to associate qualifications, and then click the Qualifications tab.
3. Click Add Qualification.
4. Qualification—Enter the qualification to associate with the task. The system automatically populates the description of the qualification and the Organization.
5. Click Submit.

Note: To remove a qualification, select the qualification to remove, and then click Remove Qualification.

Adding checklists to tasks

Add a checklist to a task to track the completion of one step of the task instruction, or to collect qualitative and quantitative data for the task.

To add checklists to tasks:

1. Open the Tasks form.
2 Select the task for which to add a checklist, and then click the Checklist tab.

3 Click Add Checklist Item. The system automatically populates Checklist Item.

4 Enter a description of the checklist item.

5 Sequence—Enter the sequence in which the checklist item should be answered for the task.

6 Type—Select the type for the checklist item, e.g., enter Quantitative, Inspection, or Meter Reading.

7 Required Entry—Select if completion of the checklist item is required to close the associated work order.

8 Equipment Level—Select the equipment level. A checklist item can be attached to the work order header equipment, equipment, or the route or linear referenced equipment.

9 Equipment Class—Enter the equipment class with which the checklist item is associated. The system automatically populates Equipment Class Org.

10 Equipment Category—Enter the equipment category with which the checklist item is associated.

11 UOM—Enter the unit of measure for the measurement. UOM is required for inspections, meter readings, and quantitative checklist items.

12 Aspect—Enter the inspection aspect measured during an inspection. Aspect is required for inspection checklist items.

13 Point Type—Enter the inspection point type. Point Type is required for inspection checklist items.

14 Repeating Occurrences—Select to indicate the measurement recorded with this checklist item is recorded more than one time during the execution of the task.

15 Task—Enter the task the system will assign to the follow-up work order activity.

16 Material List—Enter the material list the system will assign to the follow-up work order activity.

17 System Level—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, requiring the check (Code Key 18).

18 Assembly Level—Enter the VMRS code identifying the subsystem needing repair (Code Key 32). The values available are based on the system-level code.

19 Component Level—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code. The system automatically populates VMRS Description.

20 Component Location—Enter the location the check will be performed on the equipment.

21 Condition—Enter the condition of the equipment required to perform the check.

22 Findings—Enter the possible findings the user can select when entering results. This is necessary for qualitative and inspection checklist items.

23 Click Submit. The system automatically populates Updated By and Date Updated.

Importing checklists from tasks

To import checklists from tasks:

1 Open the Tasks form.
2 Select the task for which to copy a checklist, and then click the Checklist tab.
3 Click Import Checklist.
4 Task—Enter the task from which to copy the checklist. The system automatically populates the task description and Task Revision.
5 Click Submit.

Defining tools

Define tools for departments. Tools are pieces of equipment that a department uses to carry out maintenance work, e.g., scaffolding or excavators. The department is usually the "owner" of a tool, so the department’s store keeps the tools.

Note: Tool refers to a type of tool, rather than an individual item. For example, if the organization has several drills, create a general Tool code called DRILL. Then create individual parts for each drill and track them as assets using the drills’ serial numbers.

See the following table to determine the best method for defining tools in the organization:

<table>
<thead>
<tr>
<th>Type of Tool</th>
<th>Importance to the Organization</th>
<th>Define Tool as a…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hammer</td>
<td>Low—Tool can be replaced easily and inexpensively</td>
<td>Simple tool</td>
</tr>
<tr>
<td>Ratchet</td>
<td>Medium—Tool should be ordered and kept in stock</td>
<td>Tool and a part</td>
</tr>
<tr>
<td>Calibration Gauge</td>
<td>High—Tool can be ordered and kept in stock and is also valuable</td>
<td>Tool, part, and asset</td>
</tr>
</tbody>
</table>

Defining simple tools

To define simple tools:

1 Open the Tools form.
2 Click New Record.
3 Organization—Enter the organization to which the tool belongs if you use multi-organization security.
4 Tool—Enter a unique code identifying the tool, and then enter a description of the tool in the adjacent field.
5 Class—Enter the class of the tool. The system automatically populates Class Org.
6 Click Save Record.

Viewing transactions for tools

View all issue and return transactions for tools. Only those tools associated to a part will display in the transaction records.
Once the transaction records are displayed, click the work order hyperlink. The system opens the Work Orders form and queries for the selected work order.

**Note:** If a common tool is associated with a common part, the transaction price will reflect the actual currency, e.g., the currency of the organization for the transaction.

To view transactions for tools:

1. Open the Tools form.
2. Select the tool for which to view transactions, and then click the Transactions tab.
3. View the information.

### Defining material lists

Certain work orders always require the same materials. A material list is a predefined list of parts that may be referenced on an activity of a work order, PM schedule, or standard work order to minimize data entry and ensure consistent material planning for jobs. First, define the material list header information, and then add part line items to the material list. Material lists must contain at least one part line item.

To define material lists:

1. Open the Material Lists form.
2. Click New Record.
3. **Organization**—Enter the organization to which the material list belongs if you use multi-organization security.
4. **Material List**—Enter a unique code identifying the material list, and then enter a description of the material list in the adjacent field.
   
   **Note:** Do not use the prefix "V-" in the Material List code. Material list codes with this prefix are reserved for system use only.
5. **Class**—Enter the class of the material list. The classes shown belong to the MATL entity.
6. **Revision Status**—Enter the revision status for the route. The system automatically populates Revision.
   
   **Note:** You can enter a Revision Status only if the PMRVCTRL installation parameter is set to Yes. Contact your system administrator for more information.
7. Click Save Record.
8. Click the Parts tab.
9. Click Add Part Line. The system automatically populates Line Number with the next consecutive number according to the INCRLINO installation parameter.
10. **Part**—Enter the part to add to the material list. The system automatically populates the part description, Part Org., Primary Manufacturer and Primary Manufacturer Part Number.
11. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate Condition.
12 Quantity—Enter the quantity needed. The system displays the unit of measure in the adjacent field.

13 Reserve—Select to reserve the part when this material list is requested on a new work order. If you mark the part line as Reserve, this setting will carry over to any work order activity on which the material list is selected, and the system will automatically reserve the part for the work order activity by creating a part reservation record in the indicated store for all material list parts flagged for reserve.

14 Critical—Select if the part is critical to all work activities requiring the material list.

15 Line Number—Modify the line number as necessary.

16 Equipment—Enter the equipment associated with the part. The system displays the part for issue only when you associate the material with a work order that has the specified equipment. The system automatically populates Equipment Type and Equipment Org.

17 Click Submit.

Copying material lists

The copy material list feature copies a material list, including all details.

To copy material lists:

1 Create a material list. See "Defining material lists" on page 379.
2 Right-click and then select Copy Material List.
3 New Material List—Enter the name of the new material list. The system automatically populates the New Material List description.
4 Select the record types to copy, and then click Submit.

Defining VMRS codes

The American Trucking Association's Vehicle Maintenance Reporting System (VMRS) is a set of codes used to track equipment and maintenance within the fleet/transportation industry. VMRS provides a "universal language" so that the various industry segments (e.g., maintenance employees, management, suppliers, and manufacturers) can communicate more easily and accurately. Values for all Code Keys are installed in the database.

When defining VMRS codes, you must first define a system-level code before you can define assembly-level or component-level codes.

To define VMRS codes:

1 Open the VMRS Codes form.
2 Click Add VMRS Code.
3 Description—Enter the description of the VMRS code.
4 System Level—Enter the VMRS code identifying the system, e.g., brakes, frame, or suspension, associated with the vehicle (Code Key 31).
5 **Assembly Level**—Enter the VMRS code identifying the associated subsystem (Code Key 32). The values available are based on the system-level code.

6 **Component Level**—Enter the VMRS code identifying the specific component or part (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.

7 Click **Submit**.

    **Note:** To delete a VMRS Code, select the code to delete, and then click **Delete VMRS Code**.

---

### Approving and rejecting work requests

View a list of work requests awaiting approval, and then either accept or reject the work requests.

**Note:** You must have sufficient status change authorizations to approve and reject work requests, and you cannot approve work requests that exceed your work requests approval limit.

---

#### Approving work requests

To approve work requests:

1 Open the **Review / Approve Work Requests** form.
2 Select one or more work requests to approve, and then click **Approve**.

    **Note:** Double-click a work request to view its details.

---

#### Rejecting work requests

To reject work requests:

1 Open the **Review / Approve Work Requests** form.
2 Select one or more work requests to reject, and then click **Reject**.

    **Note:** Double-click a work request to view its details.

3 Enter the reason for rejection.
4 **Use Reason for All**—Select if you are rejecting multiple work requests and the reason for rejection applies to all of the work requests.
5 Click **OK**. The system removes the rejected work requests from the list, and then sets the system status of the work requests to Rejected.
Creating incident requests

Create and update hospitality-based incident request records.

To create incident requests:

1. Open the Incident Requests form.
2. Click **New Record**.
3. **Find Guest By**—Choose one of the following options to search for a guest:
   - **Room**—Select to locate guests by their room assignment.
   - **Employee**—Select to locate the hospitality employees by their employee codes.
   - **Employee Name**—Select to locate the hospitality employees by their names.
   - **Last Name**—Select to locate guests by their last names.
   - **First Name**—Select to locate guests by their first names.
   - **Phone**—Select to locate guests by their phone numbers.
4. Enter data in **that contains**, e.g., if you chose to search by **Phone**, enter the phone number, and then click 🔍 to begin the search process.
   - **Note**: If exactly one match is found by the room, the system populates **Room**, the room description, and **Room Property**.
   - If exactly one match is found by the guest's last name, first name, or phone number, the system populates the information in the Guest Information section.
5. Enter the guest's first, middle, and last name.
6. **VIP Status**—Select the guest's VIP status.
7. **Employee**—Enter the employee responsible for the incident request.
   - The system automatically populates the employee description.
8. Enter the guest's **E-mail Address** and **Phone Number**.
9. **Room**—Enter the room where the incident occurred.
   - The system automatically populates **Room**, the room description, and **Room Property**.
10. **Problem Code**—Enter the code identifying the incident problem.
    - The system automatically populates the service problem code description and **Problem Code Property**.
11. **Incident Details**—Enter details of the incident as necessary.
12. **Copy to WO Comments**—Select to copy the work order comments to the incident request.
13. **Property**—Enter the property of the request.
14. **Status**—Select the status for the request.
15. **Source**—Select the request source.
16. **Type**—Select the request type.
17. **Assigned To**—Enter the person responsible for the property, this is typically the property manager, housekeeping, or building maintenance personnel.
    - The system automatically populates **Request Date** and **Request Taken By**.
18. **Work Order**—Enter the work order for the incident request.
    - The system automatically populates **Standard WO** and **Duplicate**.
19 **WO Priority**—Select the work order priority.

20 **WO Property**—Enter the property at which to perform the incident work.

21 Click **Save Record**.

   The system automatically populates **Incident Request**.

   **Note:** To create a work order based on the incident request, enter the room and problem code for the incident, and then click **Create WO**.

   To email the guest, click **Email Guest**.

   To create another guest request based on the guest information and another incident, click **Create Another Guest Request**.

---

### Creating standard work orders

A standard work order is a predefined set of details and activities that may be referenced on a work order to facilitate entry of repair jobs that are performed repeatedly over time, but not according to a definable schedule as is the case with periodic preventive maintenance. A basic standard work order defines a simple repair job consisting of one or more activities.

A basic standard work order consists of a header and one or more activity lines. **Standard WO**, **Description**, and **Organization** frame the header of any standard work order, while two additional required fields, **WO Type** and **Duration**, and two optional fields, **WO Class** and **Priority**, house data that transfers to any work order on which the standard work order is selected. Any activities that are defined for the standard work order are copied to the work order as a result of selecting a standard work order.

To restrict the list of standard work orders available on a given work order to only those defined as applicable for the equipment and/or problem indicated on the work order at the time the standard work order selection is made, enter **Equipment Class**, and/or **Category**.

Create standard work orders, and then apply the information from standard work orders to regular work orders.

**Note:** You can only insert, update, or delete work orders if you are authorized to do so.

---

### Defining standard work order headers

Create headers for standard work orders. Headers include basic information about the work orders.

To define standard work order headers:

1. Open the **Standard WOs** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the standard work order belongs if you use multi-organization security.
4 Standard WO—Enter a unique code identifying the standard work order, and then enter a description of the work in the adjacent field.

5 Problem Code—Enter the code identifying the problem.

6 Equipment Class—Enter the class of the equipment on which to perform the work. The classes shown belong to the OBJ entity. The system automatically populates Equip. Class Org.

7 Category—Enter the equipment category to which the standard work order applies.

8 Class—Enter the class of the work. The classes shown belong to the STWO entity. The system automatically populates Class Org.

9 Template—Select to create a standard work order template with which to associate children.

   Note: If you are creating a template work order, you must specify a Duration greater than the total duration of all child work orders.

10 WO Type—Select the work order type of the standard work order.

11 Duration—Enter the duration of the standard work order, in days.

12 WO Class—Enter the work order class of the standard work order. The system automatically populates WO Class Org.

13 Priority—Select the priority of the standard work order.

14 Click Save Record.

Defining standard work order activities

Set up activities for standard work orders. Associate specific task lists and material lists to standard work orders.

To define standard work order activities:

1 Open the Standard WOs form.

2 Select the standard work order for which to define an activity, and then click the Activities tab.

3 Click Add Activity.

4 Activity—Enter an activity number for the first activity. If you do not provide this number, the system automatically enters a number based on the INCRLINO installation parameter. For example, if INCRLINO = 1, then the system enters the number "1" for Activity and increases by 1 for each new record. However, if INCRLINO = 5, then the system enters the number "5" for Activity and increases by 5 for each new record.

5 Trade—Enter the trade of the activity.

6 Task—Enter the task list of the activity.

7 Task Qty.—Enter the required number of units of the task to associate with the activity, and then select the unit of measure for the Task Qty. in the adjacent field. For example, a work order activity to pave 100 miles of highway today will indicate a Task Qty. of "100" and a unit of measure of "Miles", whereas the same task on another day will indicate only 80 miles due to the steep inclines of the stretch of highway being paved on that day.
8 Material List—Enter the material list to include for the activity.
9 Estimated Hours—Enter the number of hours estimated to complete the activity.
10 People Required—Enter the number of people needed to complete the activity.
11 Start—Enter a 1 if the activity is to start on the same day that the standard work order starts. Enter a 2 if the activity should start on day 2 of the standard work order, etc.
12 Duration—Enter the duration of the activity in days.
13 Hired Labor—Select to indicate that the activity will be completed by an external source. Complete steps 14-20 only if you use the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS).
   Note: Depending on your system configuration, the VMRS-related fields may not be displayed. Contact your system administrator for more information.
14 Reason For Repair—Enter the reason the vehicle needs repair (Code Key 14).
15 Work Accomplished—Enter the work performed on the vehicle (Code Key 15).
16 Technician Part Failure—Enter the reason the technician or supplier thinks the vehicle failed (Code Key 18).
17 Manufacturer—Enter the Manufacturer/Supplier Code (Code Key 34) to associate with the vehicle.
18 System Level—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, needing repair (Code Key 31).
19 Assembly Level—Enter the VMRS code identifying the subsystem needing repair (Code Key 32). The values available are based on the system-level code.
20 Component Level—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.
21 Activity Comments—Enter comments or instructions for the activity.
22 Click Submit.
   Note: To delete an activity from a standard work order, select the activity to delete, and then click Delete Activity.

Copying standard work orders

Copy standard work orders to create new standard work orders.

To copy standard work orders:

1 Open the Standard WOs form.
2 Select the standard work order to copy, and then click the Record View tab.
3 Right-click on the form, and then choose Copy Record.
4 New Standard WO—Enter a unique code identifying the new standard work order, and then enter a description of the work order in the adjacent field.
Assigning child work orders to standard work orders

First define standard work order headers, and then define child standard work orders. You can only define child work orders if you selected Template on the standard work order header. If you define child work orders using a standard work order template, the system automatically creates a work order for each child assigned to the template. See "Defining standard work order headers" on page 383. You can also set up child work orders to change the status of a work order depending on another work order, and you can calculate the requested start and end dates for each work order when the new work order is created from the template.

To assign child work orders to standard work orders:

1. Open the Standard WOs form.
2. Select the standard work order for which to define children, and then click the Children tab.
3. Click Add Child Standard WO.
4. Child Standard WO—Enter the child standard work order to assign to the standard work order template. The system automatically populates the child standard WO description, Duration, and Priority if available.
5. Sequence—Enter the sequence number in which to perform the child work order.
6. Step—Enter the step number (in the sequence of steps) in which to perform the child standard work order.
7. Trigger Sequence - Step—Enter the sequence/step number combination of the child standard work order that triggers the selected child work order.
8. Old Status—Enter the existing status of the child standard work order to be changed.
9. New Status—Enter the new status to assign to the child standard work order upon completion of the triggering event.
10. Click Submit.

Note: To remove a child standard work order, select the child standard work order to remove, and then click Remove Child Standard WO.

Managing tools for standard work orders

Add, delete, modify, or view lists of tools associated to standard work order activities. Using the tool records, create planned tools for work orders, scheduled tools for work orders, or both.

To manage tools for standard WO:
1 Open the **Standard WOs** form.
2 Select the standard work order for which to manage tools, and then click the Tools tab.
3 Click **Add Tool**.
4 **Tool**—Enter the tool to add to the standard work order. The system automatically populates the tool description and **Tool Org**.
5 **Hours Requested**—Enter the number of hours estimated to use the tool to complete the activity.
6 **Qty. Required**—Enter the tool quantity estimated to complete the activity. The system automatically populates **Total Hours Required**.
7 **Activity-Trade**—Enter the trade of the activity for the standard work order. The system automatically populates **Activity Duration**.
8 Click **Submit**.

**Associating permits with standard work orders**

Associate permits with standard work orders. The permits will be copied to the work order when work orders are created that reference the standard work order.

To associate permits with standard work orders:

1 Open the **Standard WOs** form.
2 Select the standard work order with which to associate a permit, and then click the **Permits** tab.
3 Click **Add Permit**.
4 **Permit**—Select the permit with which to associate the standard work order. The system automatically populates the description and **Permit Org**.
5 **Auto Create PTW**—Select to automatically create a permit to work when the a new work order is created and the permit is copied to the work order.
6 **PTW Type**—Select the type of permit to work to create when the work order is created.
7 **Type of Work**—Select the type of work to attach to the created permit to work.
8 **Priority**—Select the priority to attach to the created permit to work.
9 **Risk**—Select to indicate the risk to attach to the created permit to work.
10 **Activity**—Enter the activity of the work order.
11 **Mandatory**—Select to indicate that the permit is mandatory to complete the work.
12 **LOTO Required**—Select to require a lockout/tagout procedure of equipment associated to the permit to work.
13 **Isolation Type**—Select the type of isolation required on the lockout/tagout procedure of equipment associated to the permit to work.
14 Click **Submit**.
Adding safety hazards and precautions to standard work orders

Add hazards and precautions to standard work orders that inform your employees on how to use equipment safely when working in hazards that can cause bodily harm and alert them in advance of the precautions to take to protect themselves from the hazard. For example, you can add a precaution to turn equipment off and remove the power cord from the power outlet before performing repairs on electrical equipment.

To add safety hazards and precautions to standard work orders:

1. Open the **Standard WOs** form.
2. Select the standard work order for which to add safety precautions and hazards, and then click the **Safety** tab.
3. Click **Add Safety Record**.
4. **Hazard**—Enter the hazard to add to the standard work order. The system automatically populates a description of the hazard, **Hazard Org.**, and **Hazard Type**.
5. **Precaution**—Enter the safety measure to protect your employees from the hazard. The system automatically populates a description of the precaution, **Precaution Org.**, **Timing**, and **Sequence**.
6. **Timing**—Select the timing which is used to identify when the precaution should be taken. For example, if your employee is working with fire, you can enter the timing of pre-work to alert the employee that they should wear fire-resistant clothing before beginning the task.
7. **Sequence**—Enter the sequence number which is used to identify the order in which your employee should be made aware of the precaution. All precautions are important regardless of the sequence number entered.
8. **Delete Pending**—Select to delete the pending safety record during the next review.
9. Click **Submit**. The system automatically populates **CreatedBy** and **DateCreated**.

Creating regular work orders

Create regular work orders to repair broken equipment, modify equipment to meet safety and environmental standards, perform work orders during a normal workday, and record information concerning equipment problems. Work orders can either be independent or part of a much larger project. First, enter header information on the **WorkOrderRecordView** page. Then add activities to the work order, schedule labor, associate qualifications with work order activities, book labor and vendor hours, associate parts, enter meter readings, create child work orders, add permits, and request tools as necessary. Add additional equipment to work orders for which similar work will be done to distribute costs across the equipment on the work order. **You may also view the status of work orders and view work order information such as work order cost and service request details. Finally, close the work order after the work is complete.**

**Note:** View and attach GIS maps to work orders scheduled for GIS-integrated equipment. To attach a GIS map to a work order, associate the GIS map to the work order via the **Work Orders** form.

You may also configure the system to link a specific equipment record’s GIS map to work orders as they are released via the Assets, Positions, or Systems form.
Defining regular work order headers

Enter work order header information on the Record View page of the Work Orders form.

**Note:** To create an editable copy of the record that contains the same base data, right-click on the Record View page, and then choose Copy Record.

You may also associate inspection routes to work orders from the Work Orders form.

**Note:** The form contains collapsible sections. Click + to expand a section.

To define regular work order headers:

1. Open the Work Orders form.
2. Click New Record.
3. **Organization**—Enter the organization to which the work order belongs if you use multi-organization security.
   The system automatically populates Created By with the User ID of the logged in user.
4. **Work Order**—Enter a description of the work needed in the adjacent field. The system assigns a work order number after you save the record.
5. **Equipment**—Enter the equipment on which to perform the work.
   The system automatically populates the following fields based on the selected Equipment if available: Equipment Desc., Equipment Type, Equipment Org., Department, Location, Cost Code, Assigned By (based on the Department), Assigned To, Safety, Last Meter Reading (from the Meter Unit of the equipment), Warranty, and Survey.
   **Note:** The system automatically selects Safety if it is selected on the Location record. The system automatically selects Multiple Equipment if you add additional equipment to the work order and it is protected.
6. **Type**—Choose one of the following options:
   - **Breakdown**—Select to create a work order in response to an equipment breakdown or failure.
   - **Calibration**—Select to create a calibration work order.
   - **PM**—Select to create a preventive maintenance work order.
   - **Repairable Spare**—Select to create a work order for repairable spare parts. If you are creating a work order for repairable spare parts, you must also add the parts to repair on the Repair Parts tab.
   - **Standard WO**—Select to create a standard work order.
     **Note:** The previously listed work order types are standard types in the system. You can also create user-defined work order types.
7. **Department**—Enter the department.
8. **Print**—Select to print the work order when work orders are batch printed.
   **Note:** Once the work order is printed, the system automatically selects Printed and unselects Print.
9. **Status**—Select one of the following options:
   - **Released**—Select to create a work order.
Work request—Select to create a work request.

Note: If you select a Status of Work request, the work request must be approved and assigned a status of Released before defining activities, scheduling labor, booking labor, etc.

10 Safety—Select if this work requires special safety precautions.

11 Warranty—Select if the equipment is under manufacturer warranty.

12 Dependent—Select to keep the work order open until all child work orders are completed.

Enter the following Linear Reference Details for steps 13-18:

13 From Point—Enter the point on the linear equipment record from which to perform the work order.

The system automatically populates Ref. Description and Geographical Ref. if available.

14 Ref. Description—Enter a description of the From Point

15 Geographical Ref.—Enter a geographical reference for the From Point.

16 To Point—Enter the point on the linear equipment record to which to perform the work order.

The system automatically populates Ref. Description and Geographical Ref. if available.

17 Ref. Description—Enter a description of the To Point.

18 Geographical Ref.—Enter a geographical reference for the To Point.

Enter the following Production Details for step 19:

19 Production Priority—Enter the priority of production for the work order.

The system automatically populates Production Request, Production Request Revision, Production Order, Production Start Date, Production End Date, and Accounting Entity if a production request is linked to the work order.

Enter the following Work Order Details for steps 20-32:

20 Location—Enter the location of the work to be completed.

21 Class—Enter the class of the work order.

22 Problem Code—Enter the code to identify the type of problem.

Note: If the selected Equipment is linked with a Criticality code, the system populates Problem Code based on the Criticality code.

23 Parent Work Order—Enter the code identifying the parent work order for the work order.

The system automatically populates the following fields:

Criticality identifies the equipment in the work request. The system only populates Criticality if you selected an Equipment for which a criticality code is linked, and it is protected.

PM Code identifies the PM work order from which the work order was generated. The system only populates PM Code if the work order was generated from a PM work order.

CN Number indicates the change notice number of the equipment on the work order.

Scheduling Session indicates the MS Project planning session associated with the equipment on the work order.

Customer indicates the asset management customer associated with the equipment on the work order.

Property indicates the asset management property associated with the equipment on the work order.

Caller Name indicates the name of the person who called in to report the problem.
Reject Reason indicates the reason that the work order was rejected.
The system automatically selects Reopened if the work order is closed and then reopened.

24 Standard WO—Enter the standard work order if it has been stored in the system library.
The system automatically populates the work order description, Type, Class, Scheduling Session, Scheduling Session Type, Maintenance Pattern-Sequence, Problem Code, Priority, Scheduled End Date, Campaign-Campaign Event and Campaign Status if available. The system also copies the standard work order activities to the current work order. If the standard work order is a template, the system creates child work orders as defined on the standard work order.

25 Priority—Enter the priority of the work order.

26 Cost Code—Enter the cost code of the work order.

27 Target Value—Enter the estimated maximum cost for the work order.

28 Failure Code—Enter the cause of failure for the equipment.

29 Action Code—Enter the action taken to resolve the problem.

30 Cause Code—Enter the cause code identifying the cause of the problem.
The system automatically populates the following fields:
    Route identifies the inspection route of which the equipment is a part.
    Inspection Status indicates the current status of the inspection route of which the equipment is a part.

31 Downtime Cost—Enter the cost that resulted from the equipment being out of operation due to failure.

32 Downtime Hours—Enter the number of hours that the equipment was out of operation due to failure.
The system automatically populates the following fields:
The system populates Last Meter Reading with the value of the last meter reading and the unit of measure of the reading in the adjacent field.

Trigger Event indicates the MS Project planning session associated with the equipment on the work order.
The system automatically populates Customer Contract if there is a contract associated with the work order or if customer charges have been calculated using the asset management services module.
The system automatically populates Original PM Due Date if the work order originated from a PM.

Note: If applicable, the system also populates Customer Contract from a project, equipment, and location associated with the work order. The system first determines whether the work order is associated with a customer contract; then checks for customer contracts associated with a project that is associated with the work order (including child projects); then for the equipment of the work order (and child equipment); and finally for the location of the work order (and child locations)

Enter the following Call Center details for steps 33-40:

33 Equipment Usability—Enter the code identifying the equipment's usability factor.

34 Temporary Fix Promise Date—Enter the date the work will be fixed temporarily, if a date was promised to the customer.

35 Provider—Enter the provider.
The system automatically populates Provider Org.
36 **Service Category**—Enter the service category.

37 **Permanent Fix Promise Date**—Enter the date the work will be fixed permanently, if a date was promised to the customer.

38 **Temporary Fix Date Completed**—Enter the date the temporary fix was completed.

39 **Service Problem Code**—Enter the service problem code.
   The system automatically populates **Service Problem Code Org**.

40 **Work Address**—Enter the address or intersection where work is requested.
   Enter the following Activity details for steps 40-46:

41 **Activity**—Enter a value if you want to create a new activity to associate with the work order.

42 **Trade**—Enter the trade required to perform the activity.
   **Note**: If you enter a **Trade**, **Estimated Hours**, or **People Required** in the Activity section of the page, an activity will automatically be created for this work order.
   An activity record can be deleted when you remove the **Trade** value.

43 **Task**—Enter the task code for the activity.

44 **Material List**—Enter the material list code for the material list containing the parts needed for the work order.

45 **Estimated Hours**—Enter the estimated number of hours required to complete the activity.
   The system automatically populates **Hours Remaining** with the estimated number of hours remaining for the activity. You may update this field at any time during the life cycle of the work order.

46 **Activity Start Date** and **Activity End Date**—Enter the starting and ending dates for the activity associated with the work order.

47 **People Required**—Enter the number of people required to perform the activity.
   Enter the following Scheduling details for steps 47-57:

48 **Reported By**—Enter the employee requesting the work.

49 **Date Reported**—Enter the date and time that the problem was reported.
   **Note**: If the BOOKDATE installation parameter is set to ON, the system does not allow you to book hours for labor for a date that is earlier than the **Date Reported**. If BOOKDATE is set to OFF, then you can book hours without any date restrictions related to the **Date Reported**.

See the following for a list of constraints related to booking hours:

- The system verifies that **Date Worked** is not less than **Date Reported** for the work order
- The system verifies that **Date Worked** is less than or equal to **Date Completed** (if populated) for the work order
- The system verifies that **Date Worked** is not greater than the current system date and time
- The system also verifies whether **Date Worked** is within the date range defined by **Scheduled Start Date** and **Scheduled End Date** on the work order activity

50 **Assigned By**—Enter the supervisor who assigned the work order.

51 **Assigned To**—Enter the person responsible for the work order.

52 **Sched. Start Date** and **Sched. End Date**—Enter the starting and ending dates for the work order.

53 **Req. Start Date** and **Req. End Date**—Enter the requested starting and ending dates for the work order.
54 **Start Date**—Enter the actual date on which the work order is started.
55 **Date Completed**—Enter the actual date on which the work order is completed.
56 **Shift**—Enter the shift during which the work is requested to be performed.
57 **Project-Budget**—Enter the project and the project budget to associate with the work order.

   **Note:** You cannot select a frozen project/budget.

58 **Service Request**—If populated, the value displayed for **Service Request** is a hyperlink to the service request associated with the work order. Click the number to view the associated service request.

59 **Click Save Record.**

   **Note:** To view a GIS map and associate it with the work order, right-click on the form, and then choose **View GIS Map.**

   If the work order is for a linear equipment record integrated with GIS, right-click, and then choose **View GIS Map** to adjust **From Point** or **To Point** via the work order’s map.

   To create a customer invoice for the work order (for a asset management services customer contract), right-click, and then select **Create Customer Invoice.** The system then calculates all customer charges for the work order that are associated with the customer contract and generates a customer invoice record.

   To create a standard work order from any general work order for easy duplication, right-click on any existing work order, and then click **Create Standard WO.** The system displays the Create Standard WO popup. Enter **New Standard WO,** and then enter a description for the new standard work order. Enter **Organization,** and then click **Submit.**

   To view the progress of a work order, right-click on the form, and then choose **Event Log.**

   To create a warranty claim for the work order, right-click on the form, and then select **Create Warranty Claim.**

   To create a production request with an Unfinished **Status,** enter **Work Order** and **Production Priority,** and right-click on the form, and then choose **Create Production Request.** The system creates a production request with an Unfinished **Status.**

   To create a production request with an Approved **Status,** enter **Work Order** and **Production Priority,** and right-click on the form, and then choose **Create Production Order.** The system creates a production request with an Approved **Status.** ERP retrieves the production request.

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**Defining regular work order activities**

After creating work order headers, define the specific work order activities to perform.

Define the trades necessary to perform the work, the specific steps involved, the materials required, and the work duration. Create a labor requisition as necessary. After task completion, indicate that an activity is completed.

If you previously specified a standard work order, the system automatically displays the activities of the standard work order. Modify the information as necessary.

To define regular work order activities:
1. Open the Work Orders form.
2. Select the work order for which to define activities, and then click the Activities tab.
3. Click Add Activity.
   The system automatically populates Activity with the next available activity number, populates Start Date and End Date with the scheduled start date of the work order, and populates People Required with a default value of "1."
4. Activity—Modify the activity number as necessary.
5. Trade—Enter the trade required to perform the activity.
6. Estimated Hours—Enter the estimated number of hours required to complete the activity.
   The system automatically populates Hours Remaining with the estimated number of hours remaining for the activity. You may update this field at any time during the life cycle of the work order.
   Complete steps 7-13 only if you use the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS).
7. Reason For Repair—Enter the reason the vehicle needs repair (Code Key 14).
8. Work Accomplished—Enter the work performed on the vehicle (Code Key 15).
9. Technician Part Failure—Enter the reason the technician or supplier thinks the vehicle failed (Code Key 18).
10. Manufacturer—Enter the Manufacturer/Supplier Code (Code Key 34) to associate with the vehicle.
11. System Level—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, needing repair (Code Key 31).
12. Assembly Level—Enter the VMRS code identifying the subsystem needing repair (Code Key 32).
   The values available are based on the system-level code.
13. Component Level—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.
14. Warranty—Select if the equipment is under manufacturer warranty.
   The system automatically selects Warranty if there is a warranty associated with the work order header or if there is an active warranty for the code key combination for the work order equipment.
15. Completed—Select if the activity is completed.
16. Start Date and End Date—Modify the starting date and ending date for the activity as necessary.
17. Task—Enter the task code for the activity. The system updates the value for People Required to correspond with the Task as necessary.
18. Material List—Enter the code identifying the material list that contains the parts needed for the activity.
19. Percent Complete—Enter the percentage of work that has been completed for the activity.
20. People Required—Modify the number of people required to perform the activity as necessary.
21. Task Qty.—Enter the required number of units of the task to associate with the activity, and then select the unit of measure for the Task Qty. in the adjacent field. For example, a work order activity to pave 100 miles of highway today will indicate a Task Qty. of "100" and a unit of measure of "Miles", whereas the same task on another day will indicate only 80 miles due to the steep inclines of the stretch of highway being paved on that day.
22. Hired Labor—Select to indicate that the activity will be completed by an external source.
Note: If the work order is a multiple equipment work order and you select **Hired Labor**, the system enables **Equipment** and it is required.

### 23 Labor Type
Select the type of labor needed if you selected **Hired Labor**.

**Note:** Activity lines only appear on the Create Labor Requisition popup if you have established one or more activities to be hired from an external source by selecting **Hired Labor** and by selecting a valid **Labor Type** on the **Activities** page.

### 24 Supplier
Enter the supplier for the activity.

### 25 Equipment
Choose one of the following options if the work order is a multiple equipment work order:

- Enter a specific equipment to which to distribute the hired labor.
- Enter All Equipment to evenly distribute the hired labor to each equipment record on the work order.
- Enter WO Header Equipment to distribute the hired labor to the equipment on the work order header equipment.

### 26 Activity Comments
Enter comments or instructions for the activity.

### 27 Click Submit.

**Note:** If the work order is a multiple equipment work order, the system creates the activity for each **Related Work Order**.

To view comments entered for an activity, select the activity for which to view comments, and then click **View PM Activity Comments**.

To delete an activity, select the activity to delete, and then click **Delete Activity**. The system deletes the record and updates the Activities list. You may delete regular work order activities as long as no other records referring to the activity have been created. The system also deletes the corresponding activity on any related work order(s).

To create a warranty claim for the work order activity, select the activity for which to create the warranty claim, and then click **Create Warranty Claim**.

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### Defining additional costs for work orders
Define additional costs for work orders. Additional costs are charges related to the work order but not to a specific part of service, i.e., non-inventory parts. These records do not affect purchasing.

To define additional costs for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to define additional costs, and then click the **Additional Costs** tab.
3. Click **Add Additional Cost**.
4. **Cost Description**—Enter a cost description.
5. **Activity-Trade**—Enter a trade or an activity. The system automatically populates **Activity** if the work order has only one associated activity.
6 **Cost Type**—Select one of the following options:

- Part
- Own Labor
- Hired Labor

7 **Date**—Enter the date of the additional cost if you use multiple equipment.

8 **Equipment**—Enter the equipment for the additional cost if this is a multiple equipment work order.

The system automatically populates **Equipment Org.** and **Related Work Order**.

9 Click **Submit**.

**Note:** Records cannot be deleted on the **Additional Costs** page. Therefore, enter negative costs to make corrections. The negative costs are not validated against the positive posts, i.e., there may be a part cost of 10 and another part cost of -15.

## Creating a labor requisition

Create a labor requisition from a work order activity to hire labor for an activity from an external source. To create a labor requisition for a work order activity, select **Hired Labor** for the **Activity** and specify a **Labor Type**. The system then displays each hired labor activity on the Create Labor Requisition popup enabling you to select the activities for which to create a labor requisition.

To create a labor requisition:

1 Open the **Work Orders** form.
2 Select the work order for which to create a labor requisition, and then click the **Activities** tab.
3 Click **Create Labor Requisition**.
4 **Requisition Description**—Enter a description of the requisition.
5 **Store**—Enter the **Store** requesting the labor.
6 **Requested By**—Enter the employee requesting the labor.
7 Select the activity for which to create a labor requisition.

**Note:** You may select multiple activities as necessary.

8 Click **Create Requisition**.

**Note:** If you are creating a labor requisition for a multiple equipment work order, the system creates a requisition line for each selected activity and copies the **Equipment** value selected for the hired labor activity to the requisition line.

The system automatically populates **Equipment** with All Equipment (on the requisition header), **Labor Type**, and **Supplier**.

The requisition/line information is applied only to the activity lines on the multiple equipment header and not to the **Related Work Order** activities.

9 Click **Cancel**.
Scheduling labor for work orders

Schedule labor hours for each work order activity by trade, by shift, and/or by employee.

**Note:** Hours can only be scheduled for work orders with activities.

To schedule labor for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to schedule labor, and then click the **Schedule Labor** tab.
3. Click **Add Schedule**.
   - The system automatically populates **Activity-Trade** with the activity-trade performing the work for the selected work order. The system populates **Scheduled Date** with the scheduled start date of the work order activity; **Scheduled By** with the name of the current user; **Completed** with the current setting of the **Completed** checkbox for the selected **Activity-Trade**; **Act. Est. Hours** with the number of hours planned for the work order activity; **Act. Sched. Hours** with the number of hours scheduled for the work order activity; and **Act. Actual Hours** with the total hours booked to date for the work order activity. When the work order activity is defined as requiring tools, the system automatically selects **Tools** for new and existing labor schedules.
   - **Note:** If the work order has multiple activities, you must select the **Activity-Trade** to schedule from the drop-down list.
   - If the project on the work order header is flagged as **Frozen**, you may not add or delete labor schedules, and the system displays all fields as read-only.
4. Enter one of the following:
   - **Employee**—Enter the personnel to schedule to perform the work. The system automatically populates the employee description and **Department**.
   - **Crew**—Enter the crew to schedule to perform the work.
   - **Scheduled Date**—Enter the date on which to schedule the work. You cannot schedule work for any date earlier than today’s date.
   - **Scheduled Hours**—Enter the estimated number of hours to complete the work. The number of hours must be between 0 and 24.
   - **End Time**—Enter the scheduled start time and end time of the work order activity.
   - **Shift**—Enter the shift to perform the activity on the scheduled date.
5. **Maintenance Equipment**—Enter the auxiliary equipment needed for the task, i.e., the equipment is not used in production.
   - The system automatically populates **Equipment Org**.
6. **Comments**—Enter additional comments about the schedule.
7. Click **Submit**.
   - **Note:** To delete a schedule, select the schedule to delete, and then click **Delete Schedule**. You may delete an existing labor schedule that is scheduled for the current date or later if you have made an error entering the data and if you have access rights for deleting the labor schedule. Also, you may only delete labor schedules that have not been frozen or completed.
Copying an existing labor schedule

You may copy an existing labor schedule and update it as necessary.

To copy an existing labor schedule:

1. Open the Work Orders form.
2. Select the work order for which to copy a labor schedule, and then click the Schedule Labor tab.
3. Select the labor schedule to copy, and then click Copy Schedule.

   **Note:** The system automatically populates Employee and Activity-Trade with the employee and activity-trade performing the work for the selected work order. The system also populates Act. Est. Hours with the number of hours planned for the work order activity; Act. Sched. Hours with the number of hours scheduled for the work order activity; and Act. Actual Hours with the total hours booked to date for the work order activity.

4. Employee—Enter the personnel to schedule to perform the work.
   The system automatically populates the employee description to correspond with the selected employee.

5. Scheduled Date—Enter the date on which to schedule the work. You cannot schedule work for any date earlier than today’s date.

6. Scheduled Hours—Enter the estimated number of hours to complete the work. The number of hours must be between 0 and 24.

7. Click Submit.

Adding equipment to work orders to split work order costs

Add equipment to work orders to split costs across equipment on the work order. When creating a work order, you must specify an equipment on the work order header. However, the system enables you to add additional equipment to the work order (including the equipment on the header) to which to distribute work order costs.

When applying work order costs to multiple equipment work orders (for booked labor, issue parts, etc.), specify a value for Equipment on forms within the system where work order costs are accrued to indicate whether the costs should be distributed evenly across all work order equipment, a specific equipment, or only the work order header equipment.

There are two types of work orders related to the addition of multiple equipment records to work orders for distributing work order costs: a "multiple equipment work order" and a "multiple equipment child (MEC)" work order. There are many references to these two types of work orders in the user documentation. See the following descriptions for clarification of the two types:

- **Multiple equipment work orders**—Multiple equipment work orders are work orders to which at least one equipment has been added on the Equipment page of the Work Orders form to distribute the work order costs across the equipment records. When the first equipment record is added to the Equipment page of the Work Orders form, the system automatically selects Multiple Equipment on the work order header.
Multiple equipment child (MEC) work orders—An MEC work order is the work order type that is assigned to a Related Work Order that the system automatically creates for each equipment record added to the Equipment page of the Work Orders form. Upon saving the equipment to the work order, the system generates the Related Work Order (of type Multiple Equipment Child) for the equipment. The Related Work Order, which can be viewed on many forms within the system, then enables the system to track work order costs at both the work order and equipment level.

For example, if you add EQUIP-001 and EQUIP-002 to the Equipment page of the Work Orders form, the system generates a Related Work Order of type MEC for both EQUIP-001 and EQUIP-002 when you save the work order, e.g., work order numbers 50001 for EQUIP-001 and 50002 for EQUIP-002.

Note: In the user documentation, all references to "MEC work order" or "related work order" are to the type of work order that is automatically created by the system for equipment records added to the Equipment page of the Work Orders form.

By default the system does not display MEC work orders on the List View page of the Work Orders form. You must use the Dataspy to access MEC work orders.

To add equipment to work orders to split work order costs:

1. Open the Work Orders form.
2. Select the work order for which to add equipment, and then click the Equipment tab.

   Note: If you selected a work order that already has child work orders on the Children page of the Work Orders form and are not MEC work orders, all of the information on the Equipment page is protected.

   If the PMRVCTRL installation parameter is set to YES and the work order on the header is a PM work order, then all of the fields on the Equipment page are protected. You cannot add or remove a PM work order equipment from the work order if PM Revision Control is in use.

   If the ROUTEEOB installation parameter is set to Y, and the parent work order is associated with an equipment route, then the system displays all of the route equipment and corresponding work orders in the grid, and they are protected.

3. Equipment—Enter the equipment to add to the work order.

   Note: You can retrieve multiple equipment to the work order using the Equipment lookup.

   Click Add WO Header Equipment to add the equipment on the work order header to the Equipment list to distribute costs to the header equipment. The system does not automatically distribute the work order costs to the equipment on the work order header. You must add the header equipment to the Equipment list to include the header equipment in the work order cost distribution.

   Click Import Route Equipment to select an existing equipment route from which to populate equipment.

   The system automatically selects Warranty on each MEC work order and each activity if the Equipment on the MEC work order is under warranty.

   The system only allows duplicate equipment records to be added to the Equipment list if the parent work order is route-based and the ROUTEEOB installation parameter is set to Y.

4. Click Submit.
The system populates the following fields on the MEC work order(s) from the parent work order: Organization, Description, Type, Status, Duration, Priority, Problem Code, Entered By, Sched. Start Date, Date Reported, Class, and Class Org.

The system populates the following fields on each MEC work order from the Equipment on the MEC work order: Equipment, Type, System Status, Equipment Type, Equipment System Type, Equipment, Equip. Organization, Location, Location Organization, Department, Cost Code, Criticality, and Safety.

The system automatically populates Parent Work Order and Route Parent (in the database only) with the work order number (on the header). The system populates the following fields from the activities on the parent work order to each MEC work order: Activity, Start Date, Trade, Task, Hired Labor, People Required, Duration, Task Qty. (UOM), Reason for Repair, Work Accomplished, Technician, Part Failure, Manufacturer, System Level, Assembly Level, Component Level, Supplier, and Supplier Org.

Note: Work order planning information is not copied to related work orders. Therefore, the system sets the Estimated Hours, Hours Remaining, and Task Qty. to 0 for all the activities on any created related work order(s).

Add additional equipment to the work order as necessary.

Note: To remove equipment from the work order, select the equipment to remove, and then click Remove Equipment.

If the AUTODMEC installation parameter is set to YES, then the system deletes the MEC work order from the system altogether.

Importing equipment from an existing equipment route to work orders

Import route equipment to quickly add equipment to a work order.

To import equipment from an existing equipment route to work orders:

1. Open the Work Orders form.
2. Select the work order for which to import route equipment, and then click the Equipment tab.
3. Click Import Route Equipment.
4. Select the route from which to import the route equipment, and then click OK.

Note: If the equipment on the selected equipment route already exists in the list of equipment added to the work order, the system does not retrieve the duplicated equipment record to the work order. See "Adding equipment to work orders to split work order costs" on page 398.

If the equipment on the selected equipment route is duplicated within the route itself, the system only retrieves one record for the duplicated equipment to the equipment list for the work order.

If no equipment are associated with the selected equipment route, the system will not add any equipment records to the list of equipment on the work order.
Associating qualifications with work order activities

Associate qualifications of trades and tasks with work order activities to establish the qualifications required for employees performing work. Qualification enforcement is determined by the WOQUAL installation parameter. See in the Infor EAM System Administrator's Guide.

When you select a trade and/or a task code for a work order activity, the system automatically retrieves any qualifications associated with the selected trade and/or task to the work order activity. You can also associate qualifications directly with the work order activity to enforce additional qualification requirements for the work order activity that are not inherited from the trade or task.

To associate qualification with work order activities:

1. Open the Work Orders form.
2. Select the work order with which to associate qualifications, and then click the Qualifications tab.
   
   Note: You must enter an activity for the work order before you associate a qualification. See "Creating regular work orders" on page 388.

3. Click Add Qualification.
   
   The system automatically populates Activity-Trade, Task, and Source.

   Note: The system only populates the activity-trade if one activity-trade exists. When two or more exist, Activity-Trade is empty.

4. Activity-Trade—Select the appropriate activity-trade for the work order.

5. Qualification—Enter the qualification to associate with the work order activity. The system automatically populates the description of the qualification and the qualification Organization.

   Note: The system selects Removed for any qualifications that are retrieved to the work order activity from a task/trade to indicate that the qualification is no longer associated with its original Source (the trade record on the Trades form or the task record on the Tasks form). You can only delete work order activity qualifications inherited from a trade/task for which Removed is selected or that are activity specific (not inherited from a trade/task).

6. Click Submit.

   Note: To remove a qualification, select the qualification to remove, and then click Remove Qualification.

Importing unlinked qualifications

Import additional trade and task qualifications that are not already linked to the work order activity.

To import unlinked qualifications:

1. Open the Work Orders form.
2. Select the work order for which to import unlinked qualifications, and then click the Qualifications tab.
Note: You must enter an activity for the work order before you associate a qualification.

3 Click **Import Unlinked Qualifications**.

4 Choose one of the following options:

- *To import trade qualifications*—Click **Import from Trade**. The system retrieves any qualifications for the trade that are not already linked to this work order activity and populates **Source** with Trade for each retrieved qualification. The system populates **Unlinked Trade Qualifications** with the number of qualifications associated with the trade selected for the work order activity that are not already linked to the work order activity.

- *To import task qualifications*—Click **Import from Task**. The system retrieves any qualifications for the task that were not previously linked to this work order activity and populates **Source** with Task for each retrieved qualification. The system populates **Unlinked Task Qualifications** with the number of qualifications associated with the task selected for the work order activity that are not already linked to the work order activity.

Booking labor for work orders

Record the number of hours that employees worked for each work order activity. You may book labor hours before closing work orders or until a specified number of days after closing work orders.

Note: Hours can only be booked against work orders with activities.

To book labor for work orders:

1 Open the **Work Orders** form.
2 Select the work order for which to book labor, and then click the **Book Labor** tab.
3 Click **Add Labor**.

4 **Activity-Trade**—Select the activity-trade performing the work for which to book labor hours.

Note: You can also select the task for which the work is performed to differentiate between multiple activities on the work order that may be assigned to the same trade.

5 Enter one of the following:

- **Employee**—Enter the personnel performing the work for which to book hours.
- **Crew**—Enter the crew performing the work for which to book hours.
- **Department**—Enter the department where the activity was performed.
- **Trade**—Enter the trade that performed the activity.
- **Date Worked**—Enter the date on which the work was performed.
- **Type of Hours**—Select the type of hours worked (e.g., normal rate, overtime rate, etc.).

6 **Rate**—Enter or modify the hourly pay rate for the employee, trade, or crew performing the work. If you defined a trade rate for the selected employee or trade, the system automatically populates **Rate** with the appropriate hourly rate. If you selected a **Crew**, the system does not populate **Rate**; when you submit the booked labor, the system looks up the trade rate for each employee on the crew.
If you defined a trade rate for the selected Employee, the system populates Rate with the employee trade rate. However, if you did not define trade rates for the selected Employee, the system populates Rate with the trade rate defined for the selected Trade. If you enter a Rate for the selected Crew, the system overrides the trade rate defined for each employee on the crew if the calculated rate is zero.

7 **Hours Worked**—Enter the number of hours spent performing the work.

8 **End Time**—Enter the scheduled start time and end time of the work order activity.

9 **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:

   • Enter a specific Equipment record to apply the booked labor to the selected Equipment and its corresponding related work order. The system also populates Equipment Org. and Related Work Order from the selected Equipment record.

   **Note:** If you are making corrections to booked labor for a multiple equipment work order and you select All Equipment or a specific equipment record for Equipment, the system also splits the booked hours and applies the correction to all the equipment on the work order or the selected equipment.

   • Enter All Equipment to evenly split the booked labor to each equipment record on the work order for the selected work order and activity. Upon saving the transaction, the system creates labor booking records and applies them to each related work order and selected activity. The system divides the number entered for Hours Worked by the number of equipment records added on the Equipment page of the Work Orders form to determine the booked labor to apply to each equipment. The Rate applicable to the multiple equipment work order is also applied to all of the MEC work orders.

   **Note:** The system automatically applies any remainder of the Hours Worked to the last equipment record on the Equipment page of the Work Orders form.

   If you select All Equipment for Equipment and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to split the labor hours against only equipment with open related work orders or against all equipment, regardless of whether the related work orders are Open or Completed (or their user-status equivalents).

   Also, the system disregards the setting of the COMDAYS installation parameter when posting labor booking transactions related work orders if you select All Equipment.

   • Enter WO Header Equipment to apply the booked labor to the work order header only.

10 **Click** **Submit**.

   **Note:** After submitting the transaction, the system does not display the original booked labor transaction entered when the Hours Worked are split across multiple equipment records. Instead, the system displays the booked labor transactions for each equipment to which the labor was split.
Booking vendor hours for work orders

Record the number of hours that vendors worked for each work order activity. You may book vendor hours before closing work orders or until a specified number of days after closing work orders.

Note: Hours can only be booked against work orders with activities.

Hours cannot be booked against work orders with a system status of Q (Work Request) or work orders that are part of a scheduling session.

The setting of the COMDAYS installation parameter indicates the number of days you can book hours after a work order is completed. If the number of days between the completion date of the work order and the current system date is greater than the value specified for COMDAYS, the system does not allow you to book hours for a work order.

To book vendor hours for work orders:

1. Open the Work Orders form.
2. Select the work order for which to book vendor hours, and then click the Book Vendor Hours tab.
3. Click Add Vendor Time.
4. PO-Line—Enter the PO-line for which to book vendor hours. The system automatically populates the purchase order description, Type, Ordered, and Received To Date to correspond with the selected purchase order line item.

Depending on the Type of the purchase order line, the system also automatically populates or protects the following additional fields.

If Type is ST (Hours from service), the system automatically populates Activity-Trade, Act. Estimated Hours, and Act. Hours Remaining. The system automatically protects % Received and Received. The system automatically populates Rate based on the selected PO-Line. You may modify Date Worked and Hours Worked as necessary.

If Type is ST (Hours from service) and the work order is a multiple equipment work order, the system protects and populates Equipment, Equipment Org., and Related Work Order from the selected PO-Line.

If Type is SF (Fixed price), the system automatically populates Activity-Trade, Act. Estimated Hours, and Act. Hours Remaining. The system automatically clears and protects Hours Worked and Rate. The system automatically populates Received based on the selected PO-Line. You may modify Date Worked, % Received, and Received as necessary.

If Type is SF (Fixed price) and the work order is a multiple equipment work order, the system protects and populates Equipment, Equipment Org., and Related Work Order from the selected PO-Line.

If Type is SH (Contractor hire), the system automatically clears and protects % Received, Received, and Rate. The system automatically populates Received based on the selected PO-Line. You may modify Date Worked, Hours Worked, and Activity-Trade as necessary.

If Type is SH (Contractor hire) and the work order is a multiple equipment work order, the system enables Equipment and it is required. The system automatically selects All Equipment for Equipment, and protects Equipment Org. and Related Work Order. If you select WO Header Equipment for Equipment, the system populates Related Work Order with the selected work order. If you select a specific Equipment, then the system populates Equipment Org. and Related Work Order from the selected Equipment.

5. Employee—Enter the personnel performing the work for which to book vendor hours.

The system automatically populates the employee description in the adjacent field.
Note: The setting of the BOOPLAN installation parameter determines the manner in which the system populates information from employee records and activity-trade records for booked hours. See in the System Administrator’s Guide.

6 Date Worked—Enter the date the hours were worked.
7 Type of Hours—Enter the type of hours worked (e.g., normal rate, overtime rate, etc.).
8 Hours Worked—Enter the number of hours spent performing the work.
   If you enter a positive value for Hours Worked, the system populates Start Time and End Time.
   If you enter a negative value or delete the Hours Worked, then the system clears Start Time and End Time.

Note: You can only book vendor labor hours against an MEC work order from the parent multiple equipment work order.

9 Rate—Enter the hourly pay rate for the vendor performing the work.
10 Units—Enter the quantity of the task being ordered. For example, if you entered 3 hours as the Estimated Hours for the Task, then the 3 hours represents one unit.
   If no value is entered for Hours Worked, then the system calculates the Hours Worked based on the Units entered as follows:
      Hours Worked = (Units/Act. Units) x Act. Estimated Hours
   If Type is SH and you enter a value for Units, the system populates Hours Worked based on the following equation:
      Hours Worked = (Units/Act. Units) x Act. Estimated Hours
   If Type is SF and you enter a value for Units, then the system populates Hours Worked based on the following equation:
      Hours Worked : Received = (Units/Act. Units) x Ordered

11 Start Time and End Time—Enter the scheduled start time and end time of the work order activity.
12 Activity-Trade—Select the activity-trade performing the work for which to book vendor hours.
   The system automatically populates Act. Units and the corresponding unit of measure, Act. Estimated Hours, Act. Hours Remaining, Department, and Trade.

13 Equipment—Choose one of the following options if the work order is a multiple equipment work order:
   Enter All Equipment to evenly split the booked vendor hours to each equipment record on the work order for the selected work order and activity. Upon saving the transaction, the system creates labor booking records and applies them to each related work order and selected activity. The system divides the number entered for Hours Worked by the number of equipment records added on the Equipment page to determine the booked labor to apply to each equipment. The Rate applicable to the multiple equipment work order is also applied to all of the MEC work orders.

Note: The system automatically populates Equipment with All Equipment if the Type is SH, otherwise the system populates Equipment from the associated PO-Line.
   The system automatically applies any remainder of the Hours Worked to the last equipment record on the Equipment page of the Work Orders form.

If you select All Equipment for Equipment and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to split the labor hours against only equipment with open related work orders or against all equipment, regardless of whether the related work orders are Open or Completed (or their user-status equivalents).
Also, the system disregards the setting of the COMDAYS installation parameter when posting labor booking transactions on related work orders if you select All Equipment. Enter WO Header Equipment to distribute the booked vendor hours to the selected **Work Order** only.

Enter a specific **Equipment** record to distribute the booked vendor hours to the selected **Equipment** and the corresponding **Related Work Order** only.

**Note:** Although **Equipment** is only editable when the **Type** is SH, the system still distributes costs for the booked vendor hours to the **Equipment** populated from the **PO-Line** for Type SF and ST. If you are making corrections to booked labor for a multiple equipment work order and you select All Equipment or a specific equipment record for **Equipment**, the system also splits the booked hours and applies the correction to all the equipment on the work order or the selected equipment. See "Adding equipment to work orders to split work order costs" on page 398.

14 **% Received**—Enter the percentage of time received. You may only enter this percentage if the **Type** is SF (Fixed price).

When you enter a value for **% Received**, the system populates **Received** based on the following equation:

\[
\text{Received} = \frac{\% \text{ Received}}{100} \times \text{Ordered}
\]

15 **Received**—Enter the value of time received. The system automatically populates the currency in the adjacent field.

16 **Click Submit.**

### Booking labor by employee

**Book labor by employee** to record the hours required for an employee to perform work orders and non-WO time.

To book labor by employee:

1 **Open the Book Labor By Employee form.**
2 **Employee**—Enter the employee code for which to book hours.
3 **Click Add Labor.**
4 **WO-Activity**—Enter the work order performed by the employee and then enter the work order activity in the adjacent field.
   The system automatically populates the description for the selected work order.
   **Note:** The system cannot book hours for work requests or PMs.
5 **Department**—Enter the department associated with the work order.
6 **Trade**—Enter the trade associated with the work order.
7 **Date Worked**—Enter the date the work order was performed.
8 **Type of Hours**—Enter the type of hours completed for the work order.
   
   **Note:** Use Non-WO Time to record sick, vacation, or travel time.

9 **Rate**—Enter or modify a pay rate for the employee performing the work order. The system automatically populates **Rate** for the employee if a trade rate or employee rate are established in the system.
   
   **Note:** **Rate** can only be modified if the default rate is 0 or null.
   
   If you make changes to **Department**, **Trade**, or **Type of Hours**, the system edits the value of **Rate**.

10 **Hours Worked**—Enter the number of hours the work order was performed.

11 **Start Time**—Enter a start time for the work order.

12 **End Time**—Enter an end time for the work order.

13 Click **Submit**.
   
   **Note:** If the work order is a multiple equipment child work order, the system automatically populates **Equipment**, **Equipment Org.**, and **Related Work Order**.

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**Booking labor for work orders in a batch**

Book labor to work orders during batch work order updates.

To book labor for work orders in a batch:

1 Open the **Batch Work Order Updates** form.

2 **Organization**—Enter an organization for the work orders to update.

3 **Allow Trade Rate to be Zero**—Select to allow the system to apply a zero trade rate if the system does not find a value for trade rate.

4 **Include Transactions on Completed Multiple Equipment Child Work Orders**—Select to include transactions on multiple equipment child work orders that are both released and completed.

5 **Work Order**—Enter the code identifying the work order for which to book labor.

6 **Activity**—Enter the activity.

7 **Employee**—Enter the employee.

8 **Department**—Enter the department.

9 **Trade**—Enter the trade.

10 **Date Worked**—Enter the date the work order was performed.

11 **Type of Hours**—Enter the type of hours completed for the work order.

12 **Hours Worked**—Enter the number of labor hours performed for the work order.

13 **Equipment**—Enter the equipment used for the work order.
   
   The system automatically populates **Equipment Org.** and **Related Work Order** if you selected **Equipment**.
   
   **Note:** If you edit **Equipment**, the system clears the values for **Equipment Org.** and **Related Work Order**.
14 **Start Time**—Enter the start time for the work order.
15 **End Time**—Enter the end time for the work order.
16 Click **Update Work Order**. The system automatically populates **ErrorMessage**.

   **Note:** Click **Copy Line** to copy the information from the currently selected row to the next available row.

   Click **Clear Line** to delete the information from the selected row.

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**Adding comments to work orders in a batch**

Add comments to several work orders and update multiple work orders simultaneously.

To add comments to work orders in a batch:

1 Open the **Batch WO Updates** form.
2 Click the **Add Comments** tab.
3 **Work Order**—Enter the code identifying the work order to update.

   **Note:** If the work order is part of an MS Project or Load Balancing Session, the system will not add any comments to the work order.

4 **Comment**—Enter comments for the selected work order.
5 **Closing Comment**—Select to add closing comments to the work order.

   **Note:** Select **Closing Comment** per individual line, or select the **Closing Comment** field header to select all lines.

   If you do not select **Closing Comment**, the system considers the comment a work order comment.

6 **Print with Document**—Select to print comments when printing the work order.

   **Note:** Select **Print with Document** per individual line, or select the **Print with Document** field header to select all lines.

7 Click **Update Work Order**. The system automatically populates **ErrorMessage**.

   **Note:** Click **Copy Line** to copy the information from the currently selected row to the next available row.

   Click **Clear Line** to delete the information from the selected row.

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**Entering work orders on the quick entry form**

Create, update, and complete work orders on the **WO Quick Entry** form. When you create a work order, the system automatically enters a status of Released on the work order header. Insert and update activities, book labor for existing activities, and issue parts to an activity. Add or view work order comments and activity comments.
Creating, updating, and completing work orders

To create, update, and complete work orders:

1. Open the **WO Quick Entry** form.
2. **Organization**—Enter the organization.
3. Choose one of the following options:
   - *Create a new work order*—Enter, for the **work order description**, a description of the work to be done.
   - *Update or complete an existing work order*—Enter, for **Work Order**, the work order number for which to update or complete.
4. **Equipment**—Enter the equipment on which the work will be performed.
   The system automatically populates the equipment description, **CN Number, Customer, Property, Caller Name**, and **Reopened**.
5. **Status**—Enter the status of the work order.
6. **Type**—Enter the work order type.
   The system automatically populates **Equipment Type** and **Printed**.
7. **Location**—Enter the location of the work to be completed.
8. **Class**—Enter the class of the work order.
9. **Problem Code**—Enter the code to identify the type of problem.
10. **Shift**—Enter the shift during which the work is requested to be performed.
11. **Project-Budget**—Enter the project and the project budget to associate with the work order.
12. **Department**—Enter the department.
13. **Safety**—Select if this work requires special safety precautions.
14. **Warranty**—Select if the equipment is under manufacturer warranty.
15. **Print**—Select to print the work order when work orders are batch printed.
16. **Standard WO**—Enter the standard work order if it has been stored in the system library.
   The system automatically populates the work order description, **Type, Class, Problem Code, Priority**, and **Scheduled End Date** if available. The system also copies the standard work order activities to the current work order. If the standard work order is a template, the system creates child work orders as defined on the standard work order.
17. **Priority**—Enter the priority of the work order.
18. **Cost Code**—Enter the cost code of the work order.
19. **Failure Code**—Enter the cause of failure for the equipment.
20. **Action Code**—Enter the action taken to resolve the problem.
21. **Cause Code**—Enter the cause code identifying the cause of the problem.
22. **Downtime Cost**—Enter the cost that resulted from the equipment being out of operation due to failure.
23. **Downtime Hours**—Enter the number of hours that the equipment was out of operation due to failure.

   The system automatically populates **Last Meter Reading** with the value of the last meter reading and the unit of measure of the reading in the adjacent field.
The system automatically populates **Trigger Event** which indicates the MS Project planning session is associated with the equipment on the work order.

24 **Reported By**—Enter the employee requesting the work.
25 **Date Reported**—Enter the date and time that the problem was reported.

**Note:** If the BOOKDATE installation parameter is set to ON, the system does not allow you to book hours for labor for a date that is earlier than the **Date Reported**. If BOOKDATE is set to OFF, you can book hours without any date restrictions related to the **Date Reported**.

26 **Assigned By**—Enter the supervisor who assigned the work order.
27 **Assigned To**—Enter the person responsible for the work order.
28 **Sched. Start Date**—Enter the starting date for the work order.
29 **Sched. End Date**—Enter the date the work is scheduled to be complete.
30 **Req. Start Date**—Enter the requested starting date for the work order.
31 **Req. End Date**—Enter the requested ending date for the work order.
32 **Start Date**—Enter the actual date on which the work order is started.
33 **Date Completed**—Enter the actual date on which the work order is completed.
34 **Target Value**—Enter the estimated maximum cost for the work order.

The system automatically populates **Currency**.

**Service Request**—If populated, the value displayed for **Service Request** is a hyperlink to the service request associated with the work order. Click the number to view the associated service request.

35 Click **Save Record**.

**Tips:** Click **Add/Edit Activity Comments** to add or edit work order comments.

**Note:** Click **Save and Create Another Work Order** to save the work order and create a new work order.

Click **Clear** to clear the **Work Order Header** section.

Click **Create Work Order** to create a new work order.

You may also click **Create Activity** to add an activity.

Creating activities for work orders

Insert and update activities as necessary.

To create activities for work orders:

1 Open the **WO Quick Entry** form.
2 Choose one of the following options:
   - **Create a new activity**—Enter, for **Work Order**, the work order number for which to create a new activity. Go to step 3.
   - **Update an existing activity**—Enter, for **Work Order**, the work order number for which to update an existing activity. Go to step 10.
3 **Organization**—Enter the organization.
4 **Work Order Description**—Enter a description for the work order.
5 **Equipment**—Enter the equipment.
   The system automatically populates the equipment description.
6 **Status**—Enter the status of the work order.
7 **Type**—Enter the work order type.
8 **Department**—Enter the department.
9 **Activity**—Enter an activity number for the activity.
   The system automatically populates **Original Deferred WO-Activity** and **Direct Materials on Deferred Activity**.
10 **Trade**—Enter the trade required to perform the activity.
   The system automatically populates **Type of Hours**. The system automatically populates **Activity** with the next available activity number, **Start Date** and **End Date** with the scheduled start and end dates of the work order, and **People Required** with a default value of "1."
11 **Estimated Hours**—Enter the estimated hours for the activity.
12 **Hours Remaining**—Enter the estimated number of hours remaining for the activity.
   Complete steps 13-26 only if you use the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS).
13 **Reason for Repair**—Enter the reason the vehicle needs repair (Code Key 14).
14 **Work Accomplished**—Enter the work performed on the vehicle (Code Key 15).
15 **Technician Part Failure**—Enter the reason the technician or supplier thinks the vehicle failed (Code Key 18).
16 **Manufacturer**—Enter the Manufacturer/Supplier Code (Code Key 34) to associate with the vehicle.
17 **Warranty**—Select if the equipment is under manufacturer warranty.
18 **Completed**—Select if the activity is completed.
19 **Task**—Enter the task code for the activity.
   The system automatically populates **Task Revision**.
20 **Percent Complete**—Enter the percentage of work that has been completed for the activity.
21 **People Required**—Enter the number of people required to complete the activity.
22 **Task Qty.**—Enter the required number of units of the task to associate with the activity, and then select the unit of measure for the **Task Qty. in the adjacent field. For example**, a work order activity to pave 100 miles of highway today indicates a **Task Qty.** of "100" and a unit of measure of "Miles", whereas the same task on another day indicates only 80 miles due to the steep inclines of the stretch of highway being paved on that day.
23 **Hired Labor**—Select to indicate that the activity will be completed by an external source.
24 **System Level**—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, needing repair (Code Key 31).
25 **Assembly Level**—Enter the VMRS code identifying the subsystem needing repair (Code Key 32).
   The values available are based on the system-level code.
26 **Component Level**—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.
27 Click **Save Record**.
Viewing and entering results of checklists for work orders

View a checklist for a work order activity to verify the progress or completion of the checklist. Alternately you may enter results for a checklist of a work order activity. To enter results for checklist items associated to the work order, the work order must have a status of Released.

To view and enter results of checklists for work orders:

1. Open the Work Orders form.
2. Select the work order for which to view checklists, and then click the Checklist tab.
3. Activity-Trade—Select the work order activity-trade for which to view checklists.
4. View the information.
5. Enter results of the checklist based on the checklist item.
   - Select Completed if Type is Checklist Item.
   - Select Yes or No if Type is Question.
   - Enter Finding if Type is Qualitative.
   - Enter Value if Type is Quantitative or Meter Reading.
   - Enter Finding and Value if Type is Inspection.
   - Notes—Enter any relevant notes for the checklist item results.
   - Final Occ.—Select if the results entered represent the final occurrence of the specific checklist item. This only applies to repeating checklist items.
   - Follow-up—Select for specific checklist items to later generate follow-up work orders for the checklist item.
     - Click Create Follow-up WO to generate follow-up work orders for previously entered results, where Follow-up is selected.
6. Click Submit.

Booking labor for work orders

Record the number of hours that employees worked for each work order activity. You may book labor hours before closing work orders or until a specified number of days after closing work orders.

Note: Hours can only be booked against work orders with activities.

To book labor for work orders:

1. Open the Work Orders form.
2. Select the work order for which to book labor, and then click the Book Labor tab.
3. Click Add Labor.
4 **Activity-Trade**—Select the activity-trade performing the work for which to book labor hours.

**Note:** You can also select the task for which the work is performed to differentiate between multiple activities on the work order that may be assigned to the same trade.

5 Enter one of the following:
   - **Employee**—Enter the personnel performing the work for which to book hours.
   - **Crew**—Enter the crew performing the work for which to book hours.
   - **Department**—Enter the department where the activity was performed.
   - **Trade**—Enter the trade that performed the activity.
   - **Date Worked**—Enter the date on which the work was performed.
   - **Type of Hours**—Select the type of hours worked (e.g., normal rate, overtime rate, etc.).

6 **Rate**—Enter or modify the hourly pay rate for the employee, trade, or crew performing the work. If you defined a trade rate for the selected employee or trade, the system automatically populates **Rate** with the appropriate hourly rate. If you selected a **Crew**, the system does not populate **Rate**; when you submit the booked labor, the system looks up the trade rate for each employee on the crew.

   If you defined a trade rate for the selected **Employee**, the system populates **Rate** with the employee trade rate. However, if you did not define trade rates for the selected **Employee**, the system populates **Rate** with the trade rate defined for the selected **Trade**. If you enter a **Rate** for the selected **Crew**, the system overrides the trade rate defined for each employee on the crew if the calculated rate is zero.

7 **Hours Worked**—Enter the number of hours spent performing the work.

8 **EndTime**—Enter the scheduled start time and end time of the work order activity.

9 **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:
   - Enter a specific **Equipment** record to apply the booked labor to the selected **Equipment** and its corresponding related work order. The system also populates **Equipment Org.** and **Related Work Order** from the selected **Equipment** record.

   **Note:** If you are making corrections to booked labor for a multiple equipment work order and you select All Equipment or a specific equipment record for **Equipment**, the system also splits the booked hours and applies the correction to all the equipment on the work order or the selected equipment.

   • Enter All Equipment to evenly split the booked labor to each equipment record on the work order for the selected work order and activity. Upon saving the transaction, the system creates labor booking records and applies them to each related work order and selected activity. The system divides the number entered for **Hours Worked** by the number of equipment records added on the **Equipment** page of the **Work Orders** form to determine the booked labor to apply to each equipment. The **Rate** applicable to the multiple equipment work order is also applied to all of the MEC work orders.

   **Note:** The system automatically applies any remainder of the **Hours Worked** to the last equipment record on the **Equipment** page of the **Work Orders** form.
If you select All Equipment for Equipment and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to split the labor hours against only equipment with open related work orders or against all equipment, regardless of whether the related work orders are Open or Completed (or their user-status equivalents).

Also, the system disregards the setting of the COMDAYS installation parameter when posting labor booking transactions related work orders if you select All Equipment.

- Enter WO Header Equipment to apply the booked labor to the work order header only.

10 Click Submit.

Note: After submitting the transaction, the system does not display the original booked labor transaction entered when the Hours Worked are split across multiple equipment records. Instead, the system displays the booked labor transactions for each equipment to which the labor was split.

### Booking labor automatically for fleet work orders

Automatically post a book labor record for an employee and a fleet work order.

To book labor automatically for fleet work orders:

1 Employee—Enter the employee for which to book labor for the fleet work order. The system automatically populates the employee name.
2 Work Order—Enter the fleet work order for which to book labor. The system automatically populates work order header information for the selected work order.
3 Type of Hours—Enter the type of hours worked, e.g., normal rate, overtime rate, etc.
4 User Password—Enter the password for the current session.
5 Auto Book Hours—Select to automatically book hours for the selected employee and fleet work order.
6 Click Start. The system records the time the labor begins.

Note: Once the system begins recording the book labor record, the system books the hours without any notification or prompting when the work is stopped.

To manually stop the book labor process, click Stop.

### Issuing parts to work orders

Issue parts to work orders.

To issue parts to work orders:

1 Open the WO Quick Entry form.
2 Work Order—Enter the work order for which to issue parts. The system automatically populates work order header information for the selected work order.
Managing parts for work orders

Use the Parts page to add parts to work orders, reserve parts for work orders, import a preplanned parts list, delete a planned part, delete a reservation, or create a parts requisition. You may also issue or return parts to a work order on the Parts page.

Adding planned parts to work orders

To add planned parts to work orders:

1. Open the Work Orders form.
2. Select the work order for which to add parts, and then click the Parts tab.
3. Click Add Part.
The system automatically populates **Activity-Trade** with the activity-trade performing the work for the selected work order and populates **Store** with the store defined for the department of the work order if available.

### 4 Part
Enter the part to add to the work order. The system automatically populates the part description, **Part Org.**, **UOM**, **Track By Asset**, **Track By Lot**, **Total Qty. Available**, and **Available**.

- **Available** indicates the quantity of the part available in the selected store for the work order activity.
- **Total Qty. Available** indicates the quantity of the part available in the selected store for the work order activity, as well as the quantity of the part available in any child stores of the selected store.

### 5 Condition
Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

### 6 Planned Qty.
Enter the quantity of the part planned for the work order activity.

### 7 Click Submit.

**Note:** To delete a planned part, select the planned part to delete, and then click **Delete Planned Part**.

---

**Viewing planned part availability for work orders**

View planned part availability for work orders to display a list of parts that have been planned for a work order on the **Parts** tab of the **Work Orders** form. See “Managing parts for work orders” on page 415.

To view planned part availability for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to view planned part availability, and then click the **Record View** tab.
3. Right-click on the form, and then choose **View Planned Part Availability**.
   The system automatically populates **Store** with the default store of the department of the work order.
4. **Store**—Enter a different store for which to view part availability information as necessary.

See the following table when viewing the planned part availability information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Order</td>
<td>The number identifying the selected work order</td>
</tr>
<tr>
<td>Activity</td>
<td>The number identifying the activity on the select-</td>
</tr>
<tr>
<td></td>
<td>ed work order for which the part is planned</td>
</tr>
<tr>
<td>Trade</td>
<td>The trade to which the work is assigned for</td>
</tr>
<tr>
<td></td>
<td>completion</td>
</tr>
<tr>
<td>Part</td>
<td>The code identifying the part on the work order</td>
</tr>
<tr>
<td>Part Org.</td>
<td>The organization of the part</td>
</tr>
<tr>
<td>Part Description</td>
<td>The description of the part</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Planned Qty.</td>
<td>The Planned Qty. of the part entered on the Parts tab of the Work Orders form</td>
</tr>
<tr>
<td>Reserved Qty.</td>
<td>The Reserved Qty. of the part entered on the Parts tab of the Work Orders form</td>
</tr>
<tr>
<td>Allocated Qty.</td>
<td>The Allocated Qty. of the part entered on the Parts tab of the Work Orders form</td>
</tr>
<tr>
<td>Used Qty.</td>
<td>The Used quantity of the part entered on the Parts tab of the Work Orders form</td>
</tr>
</tbody>
</table>
| Available Qty.        | The system calculates the Available Qty. of the part as the difference between the Qty. on Hand of the part in the selected Store and any allocations of the part that have been allocated to other work orders, which is displayed in Allocated Qty. on the Parts tab of the Work Orders form.  
  
  **Note:** Available Qty. normally displays the Qty. on Hand in the selected Store minus the Allocated Qty. of the part for all work order/activity combinations except the selected Work Order and Activity for which you are viewing the Available Qty.  
  
  However, on the Planned Part Availability popup, the system displays the Available Qty. for multiple activities on the same work order at the same time. Therefore, the system calculates the Available Qty. without subtracting the Allocated Qty. for other activities on the same work order and the Available Qty. for a given part is the same for every activity on the selected Work Order.  
  
  The system calculates the Total Available Qty. as the sum of the Available Qty. of the part in the selected Store and the Available Qty. in all child stores of the selected Store.  
  
  UOM                   | The unit of measure of the part                                                                                                                                 |
| Direct                | Indicates whether the part is designated as a Direct Purchase part on the Parts tab of the Work Orders form                                                                                     |
| Held Qty.             | The system calculates Held Qty. as the total quantity of the part(s) that are being held for the selected Store.  

A part is "held" if the part is on a purchase order. If no purchase order exists for the part, then the "held" quantity corresponds with a store-to-store issue transaction.

The system calculates the On Order Qty. as the total remaining quantity (the quantity ordered minus the Receipt Qty.) on approved purchase order lines.

For parts for which Direct is not selected, the system only includes purchase order lines of type Stock Purchase. For parts for which Direct is not selected, the system only includes purchase order lines of type Direct Purchase that are associated with the same Work Order and Activity.

The system calculates the Shortage Qty. based on the following equation:

Shortage Qty. = Used + Held Qty. + Available Qty. + On Order Qty. – Planned Qty.

If there is no shortage of the part, then the system displays 0 as the Shortage Qty. If there is a shortage of the part, then the system displays the quantity of the part shortage as the Shortage Qty. and highlights the value in red.

Adding core tracked parts to work orders for repair

A repairable spare work order is a work order for core tracked parts to be repaired internally. Designate a repairable spare work order as such by selecting Repairable Spare as the work order Type on the header, and then add the parts to repair on the Repair Parts tab.

If you selected Auto-Assign for a part on the Stores tab of the Parts form, the system will follow the auto-assignment process for the part.

To add core tracked parts to work orders for repair:

5 Click Close.
1 Open the Work Orders form.

2 Select the work order to which to add a core tracked part, and then click the Repair Parts tab.

3 **Part**—Enter the part to add. The system automatically populates the **Condition**. The system automatically calculates **Qty. to Repair** based on the **Core Qty.** entered for the part on the Repair Details tab of the Parts form.

4 **Store**—Enter the store holding the part for repair.

   **Note:** The system automatically calculates the default **Qty. for Repair** when you enter a **Store**. You must enter a **Store** if you want to utilize the auto assignment feature.

   If you modify the **Store** entered for the repair part on the Repair Parts tab of the Work Orders form, the system automatically recalculates the default **Qty. for Repair**. If you clear the **Store** for the repair work order, the system does not clear the **Qty. for Repair**. If the **Qty. Assigned** is greater than 0, then **Store** is protected.

5 **Qty. to Repair**—Enter the quantity of the part to repair.

   **Note:** After submitting the record, you can update **Qty. to Repair** based on the following conditions:
   - **Qty. to Repair** is greater than 0.
   - **Qty. to Repair** is less than or equal to the **Qty. for Repair**.
   - You have received or scrapped parts for this work order.

6 **Qty. Completed**—Enter the quantity of the parts on which repairs are completed.

   **Note:** If the RSPCOMP installation parameter is set to NO, **Qty. Completed** is hidden. If the RSPCOMP installation parameter is set to YES, you can modify the **Qty. Completed** based on the following conditions after submitting the record:
   - You must assign repair details for the full **Qty. to Repair**.
   - **Qty. Completed** is greater than or equal to 0.

7 Click **Submit**.

   **Note:** To delete a repair part line, select the repair part line to delete, and then click **Delete Repair Part**.

**Manually assigning repair details for core tracked parts on work orders**

Manually assign repair details for core tracked parts on work orders. If you did not select Auto-Assign on a core tracked part record, you must manually assign repair details for the repair parts on work orders. Manually assigning repair details for parts enables you to designate the store, bin, lot, and asset information to identify the parts to repair and their location.

You can also change repair details that were created during the system’s automatic assignment process using the Repair Details popup. See "Understanding the auto-assignment processes for core tracked parts" on page 198.

To manually assign repair details for core tracked parts on work orders:

1 Open the Work Orders form.
2 Select the work order to which to assign repair details for core tracked parts, and then click the Repair Parts tab.

3 Select the part to which to manually assign repair details. The system automatically populates the Repair Part Details with the part information.

**Note:** You can modify Qty. to Repair and Qty. Completed for a repair part if necessary. If you make any changes to Qty. to Repair or Qty. Completed, you can use the Repair Details popup to edit Qty. Assigned as necessary.

4 Click Assign Repair Details. The system displays the Part and Part Org. of the selected part. Track by Asset is selected if the part is tracked by asset. The system automatically populates Total Qty. to Repair and Total Qty. Assigned. Total Qty. to Repair indicates the Qty. to Repair for the part from the Repair Parts tab of the Work Orders form. The Total Qty. Assigned indicates the quantity of the part to repair on this work order that has already been assigned from a repair bin location.

5 Select the store, bin, lot, and asset from which to assign a quantity of the part to repair.

6 Qty. Assigned—Enter the quantity of the part to assign for repair. **Note:** The value entered for Qty. Assigned cannot be greater than the quantity of the part that is in stock for repair.

7 Click Submit.

Manually adding part failure details to work orders

Add, view, modify, and delete part failures on the Part Failures tab. Record details are normally displayed on the Part Failures tab as the result of an issue or return part being flagged as a failure. You can also manually add part failure details to work orders.

To manually add part failure details to work orders:

1 Open the Work Orders form.

2 Select the work order for which to add part failure details, and then click the Part Failures tab

3 Click Add Part Failure.

4 Part—Enter the part that failed. The system automatically populates the part description and Part Org.

5 Failed Qty.—Enter the quantity of the part that failed.

6 Asset ID—Enter the asset ID if the part is tracked by asset. The system automatically populates the description and Asset Org.

7 Component Location—Enter the component location.

8 Problem Code—Enter the code of the problem that required work.

9 Failure Code—Enter the reason that the part failed.

10 Failure Notes—Enter comments about the part failure.

11 Date Failed—Enter the date the part failed.

12 Condition—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate Condition.
13 **Action Code**—Enter the action taken to correct the part failure.

14 **Cause Code**—Enter the problem cause code, i.e., the root cause of the part failure.

15 Click **Submit**. To remove a part failure from a work order, select the record and then click **Remove Part Failure**.

**Reserving parts for work orders**

To reserve parts for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to add parts, and then click the **Parts** tab.
3. Click **Add Part**.
   - The system automatically populates **Activity-Trade** with the activity-trade performing the work for the selected work order and populates **Store** with the store defined for the department of the work order.
4. **Part**—Enter the part to reserve for the work order.
   - The system automatically populates the part description, **Part Org.**, **UOM**, **Track By Asset**, **Track By Lot**, **Total Qty. Available**, and **Available**.
   - **Available** indicates the quantity of the part available in the selected store for the work order activity.
   - **Total Qty. Available** indicates the quantity of the part available in the selected store for the work order activity, as well as the quantity of the part available in any child stores of the selected store.
5. **Reserved Qty.**—Enter the quantity of the part to reserve for the work order activity. The number must be greater than 0 (zero).
6. Click **Submit**.
   - **Note:** To delete a part reservation, select the part reservation to delete, and then click **Delete Reservation**.

**Importing a parts list for a work order**

To import a parts list for a work order:

1. Open the **Work Orders** form.
2. Select the work order for which to import a parts list, and then click the **Parts** tab.
3. Click **Import Parts List**.
4. **From**—Select one of the following options:
   - **Work Order EQ**—Select to import the part from work order equipment.
   - **Material List**—Select to import a material list.
   - **Equipment**—Select to import the part from an equipment record.
5. **Activity-Trade**—Select the activity-trade performing the work for which to import a parts list.
6. Select the parts to import.
Creating a parts requisition

Create a parts requisition to order a part from an external source if the Planned Source of the part is Direct Purchase.

To create a parts requisition:

1. Open the Work Orders form.
2. Select the work order for which to create a parts requisition, and then click the Parts tab.
3. Click Create Parts Requisition.
4. Description—Enter a description of the requisition.
5. Store—Enter the Store requesting the part.
6. RequestedBy—Enter the employee requesting the part.
7. Supplier—Enter the supplier for the part.
8. Select the activity/part for which to create a parts requisition.
    Note: You may select multiple activities as necessary.
9. Click Create Requisition.
    Note: Click Cancel to close the Create Parts Requisition popup without saving changes.

Creating a pick ticket

Create a pick ticket to identify a set of parts that are required for a work order activity.

To create a pick ticket:

1. Open the Work Orders form.
2. Select the work order for which to create a pick ticket, and then click the Parts tab.
3. Click Create Pick Ticket.
4. Description—Enter a description of the pick ticket.
5. Store—Enter the store for which to create the pick ticket.
6. Date Required—Enter the date by which the list of parts is needed.
7. Status—Select the status of the pick ticket. The system automatically assigns Unfinished as the status of the pick ticket.
8. Class—Enter the class of the pick ticket.
9. Delivery Address—Enter the address to which to deliver the parts.
10. Deliver to Supplier—Enter the supplier to whom to deliver the parts.
11. Deliver to Employee—Enter the employee to whom to deliver the parts.
12 **Default Approver**—Enter the individual responsible for approving the pick ticket.
13 Select the parts to add to the pick ticket, and then click **Create Pick Ticket**.
   
   **Note:** Click Refresh Part List to update the **Available Qty.** for the selected store and to reset **Required Qty.**

Creating a parts requisition

Create a parts requisition to order a part from an external source if the **Planned Source** of the part is Direct Purchase.

To create a parts requisition:

1. Open the **Work Orders** form.
2. Select the work order for which to create a parts requisition, and then click the **Parts** tab.
3. Click **Create Parts Requisition**.
4. **Description**—Enter a description of the requisition.
5. **Store**—Enter the **Store** requesting the part.
6. **Requested By**—Enter the employee requesting the part.
7. **Supplier**—Enter the supplier for the part.
8. Select the activity/part for which to create a parts requisition.
   
   **Note:** You may select multiple activities as necessary.
9. Click **Create Requisition**.
   
   **Note:** Click **Cancel** to close the Create Parts Requisition popup without saving changes.

Viewing unreturned core parts

View and track core parts issued to a work order, equipment, project-budget or employee for which a corresponding core was never returned to the store after failing. When core parts remain outstanding, the value of the core part remains charged against the work order, or to whatever it was issued. Once the core part is returned the core value is removed from the work order.

**Note:** The total value of cores which remain unreturned for a work order can be seen on the **Cost Summary** page of the **Work Orders** form.

To view unreturned core parts:

1. Open the **Unreturned Cores** form.
2. View the unreturned core parts.
Entering monitored data results for work orders

Enter a new work order inspection point (location) for a monitored data object (equipment) or modify an existing work order inspection point.

To enter monitored data results for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to enter monitored data results, and then click the **Monitored Data Results** tab.
3. Click **Add Result**.
4. **Monitored Equipment**—Enter the equipment to monitor. The system populates the description in the adjacent field. The system automatically populates **Monitored Equipment Org.**
5. **Aspect**—Enter the inspection aspect with which to associate the monitored data object.
6. **Point Type**—Enter the inspection type to associate with the equipment or equipment category.
7. **Point**—Enter the inspection point number.
8. **Date**—Enter the date of the inspection.
9. Click **Submit**.

Issuing and returning parts for work orders

You may issue or return parts to a work order on the **Parts** page.

Issuing parts to work orders

Issue parts to work orders.

To issue parts to work orders:

1. Open the **WO Quick Entry** form.
2. **Work Order**—Enter the work order for which to issue parts. The system automatically populates work order header information for the selected work order.
3. **Part**—Enter the part to issue to the work order. The system automatically populates **Part Description**, **Part Org.**, **Available Qty.**, and **Track by Asset**.
4. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
5. **Store**—Enter the store from which to issue parts.
6. **Bin**—Enter the bin from which to issue the parts.
7. **Lot**—Enter the lot from which to issue the parts.
8. **Failed Qty.**—Enter the quantity of the part that failed.
   
   **Note**: The system does not allow part failures on an Issue for parts tracked by asset.
9. **Date/Time**—Enter the desired date and time of the transaction.
10 Date Failed—Enter the date the part failed.

11 Failure Notes—Enter comments about the part failure.

12 Transaction Qty.—Enter the number of parts to issue to the work order. The number must be greater than zero.

13 Asset ID—Enter the asset ID if the part is tracked by asset. The system automatically populates Asset Org.

14 Problem Code—Enter the code of the problem that required work.

15 Failure Code—Enter the reason that the part failed.

16 Action Code—Enter the action taken to correct the part failure.

17 Cause Code—Enter the problem cause code, i.e., the root cause of the part failure.

18 Click Save Record.

   Note: Click Clear to clear the Issue Parts section. The system removes the data from the Issue Parts section. Click View Part Details to view part details for the selected work order.

Returning parts from work orders

Return unused parts issued to work orders back to stores.

To return parts from work orders:

1 Open the Work Orders form.

2 Select the work order for which to return parts, and then click the Parts tab.

3 Part—Enter the part to return.

   The system automatically populates the part description, Part Org., UOM, Track By Asset, Track By Lot, Total Qty. Available, Available, New Orders Not Allowed, Primary Manufacturer, and Primary Manufacturer Part Number.

   Available indicates the quantity of the part available in the selected store for the work order activity. Total Qty. Available indicates the quantity of the part available in the selected store for the work order activity, as well as the quantity of the part available in any child stores of the selected store.

4 Activity-Trade—Enter the activity-trade performing the work for the selected work order.

5 Store—Enter the store to which to return parts.

6 Transaction Type—Select Return.

7 Date—Enter the desired date of the transaction.

8 Equipment—Choose one of the following options if the work order is a multiple equipment work order:

   • Enter a specific equipment to which to distribute the return Quantity.
   • Enter All Equipment to evenly distribute the return Quantity to each equipment on the work order.
   • Enter WO Header Equipment to distribute the return Quantity to the work order header only.

   Note: The system automatically applies any remainder of the return quantity that cannot be evenly split to the last equipment record on the Equipment page of the Work Orders form.
If you select All Equipment and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to distribute the cost of the return against only open related work orders or against all equipment, regardless of whether the related work orders are Open or Completed (or their user-status equivalents).

The value displayed for Used in the Parts list displays the quantity of the part issued/returned for the header work order and all related MEC work orders for the activity.

The setting of the RTNANY installation parameter can also affect returns for which there is an insufficient issue quantity against which to make a return when returning against All Equipment. If RTNANY is set to Yes, the system distributes the return Quantity evenly across all equipment on the work order. If RTNANY is set to No, the system does not allow you to make the return if there is an insufficient quantity of the part.

9 **Quantity**—Enter the number of parts to return to the work order. The number must be greater than 0 (zero).

**Note:** If the part is tracked by asset, **Quantity** must be equal to 1.

10 **Asset ID**—Enter the asset ID if the part is tracked by asset.

11 **Bin**—Enter the bin to which to return the parts.

12 **Lot**—Enter the lot to which to return the parts.

13 **Tool Hours**—If the part you are returning is identified as a tool, enter the number of hours the tool was in use.

**Note:** If the work order is a MEC work order, then the system splits the tool hours based on the selected Equipment.

14 **Manufacturer**—Enter the manufacturer of the part.

15 **Return for Repair**—Select if the part to return is a repairable spare and you want to return the part to the store for repair. The system adds the return quantity to the Qty. for Repair in the store to which the part is returned when you submit the return.

**Note:** If you select Return as the Transaction Type and the selected Part is a repairable spare part, the system enables Return for Repair. If you select Return for Repair, the system allows part failures and populates Bin with the Default Repair Bin. If the Default Repair Bin overwrites a different bin, then the system clears Lot.

If the Part is a repairable spare part that is also tracked by asset and you unselect Return for Repair, the system clears Asset ID.

If you submit a return transaction for a repairable spare part and you unselect Return for Repair, the system processes the return as a normal return.

16 **Manufacturer Part Number**—Enter the part number as identified by the manufacturer.

17 **Failed Qty.**—Enter the quantity of the part that failed.

**Note:** The system does not allow part failures on a Return for parts tracked by asset or repairable spare.

18 **Date Failed**—Enter the date the part failed.

19 **Problem Code**—Enter the code of the problem that required work.

20 **Failure Code**—Enter the reason that the part failed.
21 Action Code—Enter the action taken to correct the problem.
22 Cause Code—Enter the problem cause code, i.e., the root cause of the problem.
23 Failure Notes—Enter comments about the failure.
24 Click Submit.

Issuing and returning parts to work orders in a batch

To issue and return parts to work orders in a batch:

1 Open the Batch Work Order Updates form.
2 Click the Issue Parts tab.
3 Store—Enter the store from which to issue or return the part.
4 Include Transactions on Completed Multiple Equipment Child Work Orders—Select to include transactions on multiple equipment child work orders that are both released and completed.
5 Return—Select to specify the part is a return.
   Note: The system assumes the part is an issue if Return is not selected.
6 Work Order—Enter the code identifying the work order for which to issue or return parts.
   Note: Enter a code for Work Order or the system will delete the entry.
7 Activity—Enter the activity for the work order.
8 Quantity—Enter the quantity of parts to issue or return to the work order.
9 Part—Enter the part to issue or return to the work order.
10 Part Org.—Enter the organization to which the part belongs.
11 Bin—Enter the bin from which to issue or return the part.
12 Lot—Enter the lot from which to issue or return the part.
13 Date/Time—Enter a desired date and time for the transaction.
14 Asset ID—Enter the asset ID for the part if tracked by asset.
15 Asset Org.—Enter the asset organization for the part.
16 Return for Repair—Select if the part is being returned for repair.
   Note: If you select both Return and Return for Repair, the system returns the part for repair.
   If you select Return for Repair, and do not select Return, the system creates a return for the part.
   If a repairable spare part is returned, the system performs a return transaction for a repairable spare.
17 Tool Hours—Enter the number of hours this part was used.
18 Equipment—Enter the equipment for which to issue or return the part.
   The system automatically populates Equipment Org. and Related Work Order if you selected Equipment.
19 Click Update Work Order. The system automatically populates Error Message.
   Note: Click Copy Line to copy the information from the currently selected row to the next available row.
Click Clear Line to delete the information from the selected row.

**Entering batch meter readings**

Enter meter readings or meter differences on the Batch Meter Readings form.

*Note:* In some cases, the default UOM is a parent meter attached to one or more Child ("Receiving") meters of the same UOM. In such cases, the new meter reading must roll down the hierarchy. See "Creating equipment hierarchies" on page 106.

To enter batch meter readings:

1. Open the Batch Meter Readings form.
2. **Equipment**—Enter the equipment for which to enter meter readings. The system automatically populates Equipment Org. if you selected Equipment.
3. **UOM**—Enter the unit of measure.
4. **Meter**—Enter the meter code.
5. **Difference**—Select to calculate the difference between the last meter reading and the current reading.
   *Note:* The system calculates Difference by adding the new value entered to the last meter reading.
6. **Date/Time**—Enter the date and time of the meter reading.
   *Note:* The date entered must occur between the date of the last meter reading and the current date. The system automatically populates the current date.
7. **New Value**—Enter the meter reading value.
8. **Work Order**—Enter the work order. The system automatically populates Related Work Order.
9. **Click Update Meters.**
   *Note:* The system updates the meter readings unless an error message is generated. In this case, the system lists the error in the Error Message field, and the row remains in the grid to be edited.
   Click Copy Line to copy the information from the currently selected row to the next available row.
   Click Clear Line to delete the information from the selected row.

**Adding child work orders to a parent work order**

Create one or more work orders that are considered children of another work order to identify the work orders as children of the parent. In some cases, the child work orders are dependent on the parent work order, which means that the parent work order cannot be completed until all child work orders have a system Status of Completed.

To add child work orders to a parent work order:
1 Open the Work Orders form.
2 Select the work order for which to add child work orders, and then click the Children tab.
   **Note:** If the selected work order is a multiple equipment work order or MEC work order, then the system protects all fields on the page, and they cannot be updated.
3 Click Add Child WO. The system automatically selects Dependent.
4 Child WO—Enter the work order number to associate with the parent work order. The system automatically populates the child work order description, **Type**, **Status**, **Equipment**, **Equipment Org.**, and **Equipment Type**.
5 Dependent—Unselect to indicate that the child work order is not dependent on the parent.
   **Note:** If Dependent is selected and the installation parameter EVTCASCD is set to NO, the parent Work Order cannot be completed unless all of its child work orders are completed.
   If Dependent is selected and the installation parameter EVTCASCD is set to YES, completing the parent work order will also complete the Child WO.
6 Click Submit. The system updates the Children list, and populates Parent Work Order with the work order header number.
   **Note:** To delete a child work order, select the child work order to delete, and then click Delete Child WO.

Adding permits to work orders

You may associate permits with a work order on the Permits page. You may also view permits associated with work order equipment.

**Note:** A work order may not have two active permit lines that refer to the same permit code.

To add permits to work orders:
1 Open the Work Orders form.
2 Select the work order for which to add permits, and then click the Permits tab.
3 Click Add Permit.
   The system automatically selects Active.
   **Note:** The system automatically flags a new permit as Active, and this setting cannot be changed while adding the permit reference to the work order. You may deactivate permits after adding the permit if necessary.
4 Permit—Select the permit to associate with the work order.
   The system automatically populates the permit description, Perm Org., Date Printed, Permit Reference, and Permit Comments to correspond with the selected permit.
5 Equipment—Choose one of the following options if the work order is a multiple equipment work order:
   - Enter a specific equipment with which to associate the permit.
6 Click **Submit**.

**Note:** You cannot delete work order permits after they have been added as a permit reference for the work order.

To deactivate a permit, select the permit to deactivate, and then click **Deactivate Permit**.

### Scheduling tools for work orders

Schedule tools from a department for specified work order activities. Record tool requirements of multiple activities of a specified work order.

To schedule tools for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to request tools, and then click the **Schedule Tools** tab.

   **Note:** You must enter an activity for the work order before you schedule a tool.

3. Click **Add Tool**. The system automatically populates **Qty. Required** and **Department**.
4. **Activity-Trade**—Select the appropriate activity-trade for the work order.
5. **Tool**—Enter the tool to request. The system automatically populates the description of the tool.
6. **Date Required**—Enter the date when you need the tool.
7. **Scheduled Hours**—Enter the number of hours required to complete the activity.
8. **Qty. Required**—Enter the number of tools you need.
9. **Activity-Trade**—Select the appropriate activity-trade for the work order.

   **Note:** The system only displays the activity-trade if one activity-trade exists. When two or more exist, **Activity-Trade** is empty.

10. **Hours Required**—The system calculates and displays the number of tools required times the number of hours required to complete the activity.
11. **Available Hours**—The system displays the hours that the tool is available.
12. **Activity Start Date**—The system displays the beginning date for which you need the tool.
13. **Activity End Date**—The system displays the final date of the activity.
14. **Department**—Enter the department associated with this tool. If the tool applies to all departments, enter *.
15. **Daily Capacity**—The system calculates and displays the quantity of tools times the hours the tool is available to the department.
16. Click **Submit**.

   **Note:** To delete a tool, select the tool to delete, and then click **Delete Tool**.
Recording tool usage for work orders

Record tool usage for work orders to enter the quantity, usage hours, and departmental information for equipment/parts defined as tools. The system automatically calculates the costs associated with the use of the tool based on the usage and the rates defined for the tool, department, and organization.

To record tool usage for work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to record tool usage, and then click the **Tools Usage** tab.
   
   **Note:** If the status of the work order is Completed (or equivalent user status), the setting of the TOOLDAYS installation parameter determines whether you can add/update tool usage for the work order.

3. Click **Add Tool Usage**. The system automatically populates Activity-Trade (if there is only one activity on the work order), Department, Date Used, Quantity, Hours Used, Scheduled Qty., Scheduled Hours, Rate, and Costs. Rate is the default rate for the Department, Organization (of the work order), and Tool. Costs is calculated as the product of the Quantity, Hours Used, and the Rate.

4. **Tool**—Enter the tool for which to add usage information. The system automatically populates the tool description.

5. **Date Used**—Enter the date of the tool usage.

6. **Quantity**—Enter the quantity of the tool that was used.

7. **Hours Used**—Enter the number of hours the tool was used.
   
   **Note:** The BOOKDATE installation parameter indicates the manner in which the system handles entries for **Date Used** and **Hours Used** when booking hours for the tool.

8. **Equipment**—Choose one of the following options if the work order is a multiple equipment work order:
   * Enter a specific equipment to which to distribute the **Hours Used**.
   * Enter All Equipment to evenly distribute the **Hours Used** to each equipment record on the work order.
   * Enter WO Header Equipment to distribute the **Hours Used** to the equipment on the work order header only.

   **Note:** The system automatically applies any remainder of the **Hours Used** to the last equipment record on the Equipment page of the **Work Orders** form.

   If you select All Equipment for **Equipment** and at least one of the related work orders has a Completed status (or equivalent user status), the system displays a message enabling you to select whether to distribute the cost of the tool usage against all equipment or only open related work orders.

   Also, the system disregards the setting of the TOOLDAYS installation parameter when posting tool usage transactions if you select All Equipment.

   The value displayed for **Used** in the Tools Usage list displays the quantity of the tool issued for the header work order and all related work orders for the activity.
9 Activity-Trade—Enter the activity and trade for the work order for which the tool was used.
10 Department—Enter the department of the work order for which the tool was used.
11 Click Submit.

Note: To delete a tool, select the tool to delete, and then click Delete Tool Usage.

To import a scheduled tool, click Import Scheduled Tools. The system imports any tools that are scheduled for the work order. If the work order is a multiple equipment work order, the system creates a record for the work order header for 0 Hours Used, creates a tool usage record for each of the MEC work orders, and divides the Hours Used for the tool equally between each of the MEC work orders.

Adding safety hazards and precautions to work orders

Add hazards to work orders to alert your employees to all the dangers (bodily harm, environmental issues like spills) they face when performing required maintenance. Attach precautions to these hazards so they can safeguard themselves and their surroundings from potential dangers. For example, if you must maintain electrical equipment, electrocution is a hazard. Add a precaution to turn that equipment off and remove from the power outlet before performing repairs on that electrical equipment.

To add safety hazards and precautions to work orders:

1 Open the Work Orders form.
2 Select the work order for which to add safety precautions and hazards, and then click the Safety tab.
3 Click Add Safety Record.
4 Hazard—Enter the hazard to add to the work order. The system automatically populates the hazard description, Hazard Org., Hazard Revision, and Hazard Type.
5 Precaution—Enter the safety measure to protect your employees from the hazard. The system automatically populates the precaution description, Precaution Org., and Precaution Revision.
6 Timing—Select the timing which is used to identify when the precaution should be taken. For example, if your employee is working with fire, you can enter the timing of "during" to alert the employee that they should wear fire-resistant clothing during the task.
7 Sequence—Enter the sequence number which is used to identify the order in which your employee should be made aware of the precaution. All precautions are important regardless of the sequence number entered.
8 Delete Pending—Select to delete the pending safety record during the next review. This checkbox is enabled when organization option SAFERREQ is set to YES.
9 Health Hazard—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates the degree to which the materials used poses a hazard to the health of the employee.
10 Flammability—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates the degree to which the materials used are flammable.
11 Instability—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates the degree to which the materials used can detonate or explode.
12 **Special Hazards**—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates any special hazards related to the materials used.

13 **Equipment**—Enter the equipment for which to observe the hazards and precautions for multi-equipment work orders. The system automatically populates **Equipment Org.** and **Related Work Order**.

14 Click **Submit**. The system automatically populates **CreatedBy** and **Date Created**.

---

### Viewing and modifying work orders

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

To view and modify work orders:

1. Open the **Work Orders** form.
   
   **Note:** Apply a Dataspy or filter, and/or sort work orders as necessary. See Lists, and Dataspy sections in Chapter 1 Basics in the *User’s Guide*.

2. View the list of work orders, and then double-click the row containing the work order to view or modify.

3. View and modify work order details as necessary. See "Creating regular work orders" on page 388.

4. Click **Save Record**.

---

### Updating work orders

Update details on a work order in a batch.

To update work orders:

1. Open the **WO Update** form.

2. Run the default dataspy. The system displays a list of work orders with a system status of "R" or "Q" in the editable grid.

3. Select the work orders to update and make changes to the following fields as necessary:
   - **Description**—Update the description of the work order.
   - **Equipment**—Update the equipment on which to perform work.
   - **Type**—Update the work order type.
   - **Department**—Update the department.
   - **Status**—Update the status of the work order.
   - **Class**—Enter the class of the work order.
   - **Problem Code**—Enter the code to identify the type of problem.
   - **Cost Code**—Enter the cost code of the work order.
   - **Failure Code**—Enter the cause of failure for the equipment.
• **Action Code**—Enter the action taken to resolve the problem.
• **Cause Code**—Enter the cause code identifying the cause of the problem.
• **Priority**—Enter the priority of the work order.
• **Assigned To**—Enter the person responsible for the work order.
• **Sched. Start Date**—Enter the starting date for the work order.

4 Click **Update WOs**.

**Note:** To print work order updates, select the work orders to print, and then click **Print Selected WO**.

---

**Viewing work order costs**

View a list of all existing costs for the selected work order and all of its children.

**Note:** If the work order is a multiple equipment work order, then the system distributes the costs to any MEC work order(s) associated with the work order based on the value entered for **Equipment** on the work order header and the equipment records added to the **Equipment** page of the **Work Orders** form. See “Adding equipment to work orders to split work order costs” on page 398

Estimated costs are not copied to related MEC work orders. Therefore, the system determines the estimated costs for MEC work orders by calculating the quotient of the estimated costs of the parent work order and the number of equipment records added to the **Equipment** page of the **Work Orders** form.

To view work order costs:

1 Open the **Work Orders** form.
2 Select the work order for which to view costs, and then click the **Cost Summary** tab.
3 See the following table when viewing work order cost information:

<table>
<thead>
<tr>
<th>Cost Type</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Labor Cost</td>
<td>Activity lines’ estimated hours multiplied by trade rate when hired labor is unchecked</td>
</tr>
<tr>
<td>Estimated Hired Labor</td>
<td>Activity lines’ estimated hours multiplied by trade rate when hired labor is checked</td>
</tr>
<tr>
<td>Estimated Stock Items</td>
<td>Parts associated with the work order that are not tools or direct purchase</td>
</tr>
<tr>
<td>Estimated Services</td>
<td>Price on the purchase order line associated with the work order</td>
</tr>
<tr>
<td>Estimated Direct Purchases</td>
<td>Parts associated with the work order when direct is checked</td>
</tr>
<tr>
<td>Estimated Tool Cost</td>
<td>Tool quantity multiplied by hours multiplied by price for the department</td>
</tr>
<tr>
<td>Cost Type</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Estimated WO Totals</td>
<td>Sum of all estimated costs</td>
</tr>
<tr>
<td>Planned Labor Cost</td>
<td>Remaining hours unless remaining hours is null; then = 0</td>
</tr>
<tr>
<td>Planned Hired Labor</td>
<td>Rate multiplied by estimated hours when hired is checked, ordered is unchecked, PLNDRQPO installation parameter is ON, and is an ST (hours from service) line type or is undefined and the work order activity is not associated with a requisition or purchase order with a line order type of ST (hours from service). If the PLNDRQPO parameter is OFF, then the same information as above applies except the work order activity is not associated to a purchase order that is approved. <strong>Note</strong>: Line types of SH (contractor hire) would never be part of the planned cost because they are recorded as the work is done.</td>
</tr>
<tr>
<td>Planned Stock Items</td>
<td>Material list quantity minus quantity of parts already issued plus quantity returned (net issued) that is not line type of PD (direct purchase) and is not a tool</td>
</tr>
<tr>
<td>Planned Services</td>
<td>The same as Planned Hired Labor except the line order type is SF (fixed price)</td>
</tr>
<tr>
<td>Planned Direct Purchases</td>
<td>Requisition line minus received quantity minus scrap quantity multiplied by price on the requisition line when the requisition is not in a status of cancelled, the requisition line type is PD (direct purchase) and active, and is not on a purchase order. If it is on a purchase order, then the value is the order quantity minus the received quantity minus the scrap quantity multiplied by price on the purchase order line plus total extra charges multiplied by the order quantity minus the received quantity minus the scrap quantity divided by the order quantity when the purchase order is not in a status of cancelled or approved and the purchase order line type is PD (direct purchase) and active.</td>
</tr>
<tr>
<td>Planned Tool Cost</td>
<td>Estimated Tool Cost minus Actual Tool Cost</td>
</tr>
<tr>
<td>Planned WO Totals</td>
<td>Sum of all planned costs</td>
</tr>
<tr>
<td>On Order Labor Cost</td>
<td>N/A</td>
</tr>
<tr>
<td>Cost Type</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>On Order Hired Labor</td>
<td>Order quantity minus received quantity minus scrap quantity when the order line type is ST (hours from service), the line is active, and the purchase order is approved.</td>
</tr>
<tr>
<td>On Order Stock Items</td>
<td>N/A</td>
</tr>
<tr>
<td>On Order Services</td>
<td>Order quantity minus received quantity minus scrap quantity when the order line type is SF (fixed price), the line is active, and the purchase order is approved.</td>
</tr>
<tr>
<td>On Order Direct Purchases</td>
<td>Remaining quantity multiplied by price plus remaining extra charges when the purchase order is approved, the order line type is PD (direct purchase), and the order quantity is greater than zero.</td>
</tr>
<tr>
<td>On Order Tool Cost</td>
<td>N/A</td>
</tr>
<tr>
<td>On Order WO Totals</td>
<td>Sum of all on order costs</td>
</tr>
<tr>
<td>Invoice Differences Labor Cost</td>
<td>Difference of actual cost and the invoiced cost for labor</td>
</tr>
<tr>
<td>Invoice Differences Hired Labor</td>
<td>Difference of actual cost and the invoiced cost for hired labor</td>
</tr>
<tr>
<td>Invoice Differences Stock Items</td>
<td>N/A</td>
</tr>
<tr>
<td>Invoice Differences Services</td>
<td>Difference of actual cost and the invoiced cost for services</td>
</tr>
<tr>
<td>Invoice Differences Direct Purchases</td>
<td>Difference of actual cost and the invoiced cost for direct purchases</td>
</tr>
<tr>
<td>Invoice Differences Tool Cost</td>
<td>N/A</td>
</tr>
<tr>
<td>Invoice Differences WO Totals</td>
<td>Sum of all invoice difference costs</td>
</tr>
<tr>
<td>Actual Labor Cost</td>
<td>Sum of booked hours cost when order line type is ST (hours from service) or SH (contractor hire)</td>
</tr>
<tr>
<td>Actual Hired Labor</td>
<td>Sum of booked hours costs that are not hired labor</td>
</tr>
<tr>
<td>Actual Stock Items</td>
<td>Sum of transaction line quantity multiplied by transaction price when the transaction line is a stock issue, return, or return for repair and is not a direct purchase.</td>
</tr>
<tr>
<td>Actual Services</td>
<td>Sum of booked hours costs when order line type is SF (fixed price)</td>
</tr>
<tr>
<td>Cost Type</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Actual Direct Purchases</td>
<td>Quantity multiplied by price plus the proportional amount of extra charges plus the proportional amount of taxes when the transaction status is approved and is a direct purchase minus any proportional return cost. Proportional is the transaction line quantity divided by the order line quantity, returning a fraction that is used as a pro rata multiplier.</td>
</tr>
<tr>
<td>Actual Tool Cost</td>
<td>Sum of all tool costs</td>
</tr>
<tr>
<td>Actual WO Totals</td>
<td>Sum of all actual costs</td>
</tr>
<tr>
<td>Total Cost Labor Cost</td>
<td>Sum of Invoice Differences Labor Cost, Actual Labor Cost, and Planned Labor Cost</td>
</tr>
<tr>
<td>Total Cost Hired Labor</td>
<td>Sum of Invoice Differences Hired Labor, Actual Hired Labor, Planned Hired Labor, and On Order Hired Labor</td>
</tr>
<tr>
<td>Total Cost Stock Items</td>
<td>Sum of Remaining Balance Stock Items and Actual Stock Items</td>
</tr>
<tr>
<td>Total Cost Services</td>
<td>Sum of Planned Services, Invoice Differences Services, Actual Services, and On Order Services</td>
</tr>
<tr>
<td>Total Cost Direct Purchases</td>
<td>Sum of Planned Direct Purchases, Invoice Differences Direct Purchases, Actual Direct Purchases, and Remaining Balance Direct Purchases</td>
</tr>
<tr>
<td>Total Cost Tool Cost</td>
<td>Sum of Planned Tool Cost and Actual Tool Cost</td>
</tr>
<tr>
<td>Total Cost WO Totals</td>
<td>Sum of all WO Totals</td>
</tr>
<tr>
<td>Remaining Balance Labor Cost</td>
<td>Estimated Labor Cost minus Total Cost Labor Cost</td>
</tr>
<tr>
<td>Remaining Balance Hired Labor</td>
<td>Estimated Hired Labor minus Total Cost Hired Labor</td>
</tr>
<tr>
<td>Remaining Balance Stock Items</td>
<td>Estimated Stock Items minus Total Cost Stock Items</td>
</tr>
<tr>
<td>Remaining Balance Services</td>
<td>Estimated Services minus Total Cost Services</td>
</tr>
<tr>
<td>Remaining Balance Direct Purchases</td>
<td>Estimated Direct Purchases minus Total Cost Direct Purchases</td>
</tr>
<tr>
<td>Remaining Balance Tool Cost</td>
<td>Estimated Tool Cost minus Total Cost Tool Cost</td>
</tr>
<tr>
<td>Remaining Balance WO Totals</td>
<td>Estimated WO Totals minus Total Cost WO Totals</td>
</tr>
</tbody>
</table>
### Cost Type | Explanation
--- | ---
Unreturned Core Charges | Total Quantity Issued minus Total Quantity Returned multiplied by the core value for all core tracked parts issued to the selected work order.

### Viewing child work orders on a parent work order
View a list of child work orders on a parent multiple equipment work order.

To view child work orders on a parent work order:

1. Open the Work Orders form.
2. Select the work order for which to view child work orders, and then click the Children tab.
3. Select the child work order for which to view details.
4. View the child work order detail information.

### Viewing service request details
To view service request details:

1. Open the Work Orders form.
2. Select the work order for which to view service request details, and then click the Service Request Details tab.
3. View the service request details.

### Viewing equipment custom fields from a work order
View the Equipment Custom Fields popup from the Work Orders form to see custom fields associated with equipment on the work order.

To view equipment custom fields from a work order:

1. Open the Work Orders form.
2. Select the work order for which to view equipment custom fields, and then click the Record View tab.
3. Right-click on the form, and then choose View Equipment Custom Fields.
4. View the equipment custom fields information.
Viewing purchasing for work orders

View purchasing information for a work order to access a list of detailed information about requisition and purchase order lines for a specific work order. The system displays information about Direct Purchase materials on purchase order lines associated with the work order and/or requisition lines that are associated with the work order that are not yet associated with purchase order lines.

To view purchasing for work orders:

1. Open the Work Orders form.
2. Select the work order for which to view purchasing, and then click the Purchasing tab.
3. View the purchasing history for the work order. See "Creating requisitions" on page 224 and "Creating and revising purchase orders" on page 320.

   Note: If a purchase order line contains a multiple equipment work order, the system also displays information about how the purchase order is split among the equipment and related work order(s).

Booking labor for purchase orders

Receive vendor labor for purchase orders.

To book labor for purchase orders:

1. Open the Book PO Labor form.
2. Purchase Order—Enter the purchase order for which to book labor. The system automatically populates the purchase order description in the adjacent field and the Organization.
3. When Date Worked Outside Activity-Date Range—Select to allow labor bookings for purchase orders when the date worked falls outside the activity date range.
4. To be Applied to Completed Multi-Equipment WOs where Equipment is All Equipment—Select to allow labor bookings for purchase orders to be applied to completed multi-equipment work orders where Equipment=All Equipment.
5. PO Line—Enter the line number of the purchase order.
6. Employee—Enter the personnel performing the work for which to book hours. The system automatically populates the employee description.
7. Equipment—Enter the equipment on which to perform labor.
8. Hours Worked—Enter the number of hours spent performing the work.
9. Start Time—Enter the scheduled start time of the work order activity.
10. Booked Labor Description—Enter the description of the booked labor.
11. Date Worked—Enter the date the labor was performed.
12. Received—Enter the number of the parts received.
13. End Time—Enter the scheduled end time of the work order activity.
14. Work Order-Activity—Enter the work order-activity for the selected PO line.
15. Type of Hours—Enter the type of hours for the labor.
16% Received—Enter the percentage of the lines received on the purchase order.
17 Task Qty.—Enter the number of units required for the service.
18 Click Book Labor.

Creating capital planning requests

Create capital planning requests to request a capital expenditure. Capital planning requests are based on forecasted labor costs, forecasted material costs, and expected cost avoidance.

To create capital planning requests:
1 Open the Capital Planning Request form.
2 Click New Record.
3 Organization—Enter the organization to which the purchase order belongs if you use multi-organization security.
   The system automatically populates Created By and Date Created.
4 CPR—Enter a description of the capital planning request in the adjacent field. The system assigns a capital planning request number after you save the record.
5 Status—Select the status value of the capital planning request.
   Note: The system populates Authorized By and Authorization Date when the capital planning request Status is Approved.
6 Equipment—Select the equipment for which to make the capital planning request.
   The system automatically populates Equipment Org.
7 WO Type—Choose one of the following options:
   • Breakdown—Select to create a work order in response to an equipment breakdown or failure.
   • PM—Select to create a preventive maintenance work order. See "Creating preventive maintenance work orders" on page 441.
   • Scheduled—Select to create a scheduled work order.
   • Repairable Spare—Select to create a work order for repairable spare parts. If you are creating a work order for repairable spare parts, you must also add the parts to repair on the Repair Parts page. See "Adding core tracked parts to work orders for repair" on page 418.
   • Standard WO—Select to create a standard work order. See "Creating standard work orders" on page 383.
   Note: The previously listed work order types are standard types in the system. You can also create user-defined work order types. See Defining System Codes in the Infor EAM System Administrator's Guide.
8 Department—Enter the department.
9 Requested By—Enter the employee making the capital planning request.
10 Assigned To—Enter the person responsible for the work to be completed for the capital planning request.
11 **Priority**—Select the priority level of the capital planning request.
12 **Sustainability**—Select if the capital planning request is related to asset sustainability features.
13 **Class**—Enter the class of the capital planning request.
   The system automatically populates **Class Org**.
14 **Objective**—Enter the objective to associate with the capital planning request.
   The system automatically populates **Objective Description** and **Objective Org**.
15 **Assigned By**—Enter the supervisor who assigned the work order.
16 **Estimated Labor Cost**—Enter the estimated labor costs for the capital planning request. The system automatically populates the currency in the adjacent field and calculates the **Total Estimated Cost** with the sum of the **Estimated Labor Cost** and **Estimated Material Cost**.
17 **Estimated Material Cost**—Enter the estimated material costs of the capital planning request. The system automatically populates the currency in the adjacent field and calculates the **Total Estimated Cost** with the sum of the **Estimated Labor Cost** and **Estimated Material Cost**.
18 **Cost Avoidance**—Enter the estimated cost avoidance for the capital planning request. The system automatically populates the currency in the adjacent field.
19 **Appropriation Date**—Enter the date by which the capital request must be appropriated.
20 **Requested Appropriation Date**—Enter the date by which you are requesting the appropriation of the capital request.
21 **ROI % (Return on Investment)**—Enter the return on investment percentage for the capital planning request.
22 **NPV (Net Present Value)**—Enter the net present value for the capital planning request.
23 **IRR % (Internal Rate of Return)**—Enter the internal rate of return percentage for the capital planning request.
24 **Major Group**—Enter the major group for the capital planning request.
25 **Group**—Enter the group for which the capital request must be appropriated.
26 **Individual**—Enter the individual element for the capital request.
27 **Additional Information**—Enter additional information for the capital request as necessary.
28 **Default Authorizer**—Enter the default authorizer for the capital request.
29 Click **Save Record**.

   **Note**: To create a work order for the capital planning request, right-click on the **Capital Planning Request** form, and then click **Create WO**. The system populates **Work Order** with the generated work order number.

   To create a project to associate to a capital planning request, right-click on the **Capital Planning Request** form, and then click **Create Project**. See "Associating Projects to Capital Planning Requests".

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**Creating preventive maintenance work orders**

Create preventive maintenance (PM) work orders to generate periodic work orders for specified frequencies or meter readings.
Preventive maintenance work orders apply to single pieces of equipment or to systems that include several pieces of equipment.

**Note:** You can only insert, update, or delete work orders if you are authorized to do so.

When you are creating PM schedules to generate periodic work orders, you can establish a "nesting reference" between major and minor PMs to bypass a minor PM that coincides with the release of a major PM. For example, you create a major PM for 90,000-mile service on a truck, for which the PM work order activities include changing the oil. You have also created a minor PM for changing the oil every 3000 miles. You can establish a nesting reference between the major PM for 90,000-mile service and the minor PM for changing the oil after 3000 miles to enable the system to bypass the PM for changing the oil after 3000 miles if its release coincides with the release of the PM for 90,000-mile service.

The system can only bypass a minor PM if it is currently associated with a major PM with a status of Released.

When bypassing a nested minor PM, the system assigns a status of Bypassed to the minor PM until the major PM is completed. Upon completion of the major PM, the system automatically assigns the status specified for **Complete Status** on the **Record View** page of the **PM Schedules** form to the minor PM, e.g., Completed or Rejected.

Additionally, if you change the status of a released major PM to Awaiting release, the system also sets the status of any related bypassed minor PMs to Awaiting release.

**Note:** If you have set up the system to require an electronic signature to authorize status changes to PM work orders, the system will display the eSignature popup when status changes occur for major and minor PM work orders associated with each other through a nesting reference.

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**Defining PM routes and equipment within routes**

A route is a list of equipment that may be associated with a work order or preventive maintenance equipment record as an indication of the scope of work to be performed, i.e., number of repetitions. Several pieces of equipment that are serviced together often follow a particular route. Identify these routes and give them a route code.

**Note:** If you have purchased the GIS integration, you may view routes on a GIS map from the Routes form. See "Viewing GIS maps from equipment records (Infor EAM)" on page 738.

If installation parameter ROUTEEOB is set to Y, the system creates MEC work orders when their parent work order is released, assuming the parent work order is associated with an equipment based route. Additionally, if the child equipment is configured to associate its map with work orders when they are released, the system associates the appropriate map with each MEC work order. See "Adding equipment to work orders to split work order costs" on page 398 for more information about MEC work orders.

To define PM routes and equipment within routes:

1. Open the **Routes** form.
2. Click **Save Record**.
3. **Organization**—Enter the organization to which the route belongs if you use multi-organization security.
4 Route—Enter a unique code identifying the route, and then enter a description of the route in the adjacent field.

5 Equipment Class—Enter the class of the equipment to inspect. The classes shown belong to the OBJ entity.

6 Category—Enter the category of equipment or route to associate with a regular route inspection.

7 Template—Select to associate categories with the route. Unselect to associate equipment with the route.
Routing templates apply to similar equipment requiring the same maintenance action and to equipment that moves so frequently that updating routes may be impractical. When you select Template, the system generates a dynamic list of all equipment that might apply to that work order, regardless of where you move the equipment. When you unselect Template, the system lists only the specific equipment listed on the work order. When you select Template, you may not specify a Category. If you select Template after entering a Category, the system clears the Category you entered.

8 Revision Status—Enter the revision status for the route.
The system automatically populates Revision.

Note: You can enter a Revision Status only if the PMRVCTRL installation parameter is set to Yes. Contact your system administrator for more information.

9 Click Save Record.

10 Click the Equipment tab.

11 Click Add Equipment.
The system automatically populates Sequence Number with the next consecutive number according to the INCRLINO installation parameter.

12 Equipment—Enter the equipment to include in the route.
The system automatically populates the equipment description, Equipment Type, and Equipment Org.

13 Sequence Number—Modify the sequence number as necessary.

14 Click Submit.

Note: To delete equipment from a route, select the equipment to delete, and then click Delete Equipment.

Defining preventive maintenance schedules
Define the PM work order and its schedule. Define PM work orders based on meter readings (readings are taken after a certain amount of usage), frequency of use (readings are taken at certain time intervals), or both.

Define PM generation "windows." Establish Ok Window %, Near Window %, and Release Window % values based on a percentage of the meter or frequency interval. For example, assume that the Ok Window % is set to 25% and the frequency of the PM schedule is 60 days. This indicates that during the 15 days (25% of 60) after closing a PM work order, none of the work needs to be redone when the equipment breaks down. The Near Window % indicates that when a breakdown occurs in this window,
it may be worthwhile to execute the PM together with the breakdown maintenance. The system generates
the work order as soon as the Release Window % is reached.

Note: You can only insert, update, or delete work orders if you are authorized to do so.

To define preventive maintenance schedules:

1. Open the PM Schedules form.
2. Click New Record. The system automatically populates Requested By with the User ID of the
logged in user and inserts the current date in Date Requested. The system automatically populates
Date Approved with the system date and time that the status of the PM is set to Approved. The
system also enters a Revision number each time the PM schedule is released/updated.
3. Organization—Enter the organization to which the PM schedule belongs if you use multi-organization
security.
4. PM Schedule—Enter a unique code identifying the PM schedule, and then enter a description of
the PM schedule in the adjacent field.
5. Type—Select the type of the PM schedule. See the following list for default status values:
   • Fixed—Select for the system to issue the PM based on a fixed schedule, e.g., based on date or
     reading when the last PM was originally due.
   • Variable—Select for the system to issue the PM based on a variable schedule, e.g., based on
     the date or reading on which the last PM was completed.
   • Duplicate—Select to allow multiple PM work orders to be open at the same time.
     Note: Selecting Duplicate as the PM type enables you to create an exception to the rule that a
     PM equipment may have only one work order for the PM work order at a time.
6. Out of Service—Select to restrict the system from displaying the PM schedule in lookups.
7. Class—Enter the class of the PM. The classes shown belong to the PPM entity. The system
   automatically populates Class Org.
8. Work Package—Select to indicate that this PM schedule can be associated with a work package.
   The system automatically populates Plan with the PM plan.
9. Choose one of the following options:
   • If the PM schedule is based on the passage of a period of time—Enter, for Perform Every, the
     length of time to elapse before the system generates the PM work order, and then select the unit
     of measure for the PM period in the adjacent field. The unit of measure for the PM period can
     be days, weeks, months, quarters, or years.
   • If the PM schedule is meter-based—Enter, for Meter Interval and/or Meter #2 Interval, the
     interval(s) between PM work orders, and then enter the corresponding unit(s) of measure in the
     adjacent field.
     Note: You can specify more than one meter interval for a PM. For example, you may want to
     change the oil in a truck every 3000 miles, which is Meter Interval. However, you may also want
     to change the oil in the same truck after 720 hours of running time, which is Meter #2 Interval.
     Enter values for Meter Interval, Meter #2 Interval, and the meter units of measure as necessary;
     however, you must enter a value for Meter Interval to enter a value for Meter #2 Interval.
10. Nesting Reference—Choose one of the following options:
To create a nesting reference to an existing PM—Select a previously scheduled PM.

To create a name by which to identify the PM schedule you are creating for nesting—Enter a name for the PM schedule to use for nesting references. After saving the PM schedule to the database, the name you enter will appear in the lookup for Nesting Reference, enabling you to create a nest between this PM schedule and other PM schedules.

11 Complete Status—Select the status to assign to minor work orders automatically bypassed and closed by the release of this PM through a nesting reference.

12 Est. Workload—Enter the estimated number of hours required to complete the work order. The system automatically populates People Required and Calc. Workload based on the Est. Workload.

13 Nest Buff. (-/+)—Enter the percent value of the nesting buffer. The system multiplies this value by the value specified for Perform Every for a period-based minor PM. The system multiplies this value by the value specified for Meter Interval and/or Meter # 2 Interval for a meter-based PM. For both period-based and meter-based PMs, the system applies the product of this equation to the associated major PM to determine the backward nesting window of the due date for the major PM. The system automatically populates this field with 25; however, you can enter any value between 0 and 99999.

Note: The Nest Buff. (-/+ is only related to time-based preventive maintenance schedule setup.

14 M1 Nest Buff. (-/+)—Enter the percent value of the nesting buffer for the first meter. The system multiplies this value by the value specified for Perform Every for a period-based minor PM. The system multiplies this value by the value specified for Meter Interval and/or Meter # 2 Interval for a meter-based PM.

For both period-based and meter-based PMs, the system applies the product of this equation to the associated major PM to determine the forward nesting window of the due date for the major PM. The system automatically populates this field with 25; however, you can enter any value between 0 and 99999.

15 M2 Nest Buff. (-/+)—Enter the percent value of the nesting buffer for the second meter. The system multiplies this value by the value specified for Perform Every for a period-based minor PM. The system multiplies this value by the value specified for Meter Interval and/or Meter # 2 Interval for a meter-based PM.

For both period-based and meter-based PMs, the system applies the product of this equation to the associated major PM to determine the backward nesting window of the due date for the major PM. The system automatically populates this field with 25; however, you can enter any value between 0 and 99999.

Note: You can enter a backward and forward nesting buffer for Perform Every or for one or both Meter Interval and Meter #2 Interval. Enter values for Nesting Nest Buffer (-/+), M1 Nest Buffer (-/+), and M2 Nest Buffer (-/+) for each PM interval as necessary.

16 Ok Window—Enter the value to use for the Ok window.

17 Near Window—Enter the value to use for the near window.

18 Release Window—Enter the value to use for the release window.

19 Perform On—Enter the week of the month and the day of the week on which to perform the work on the equipment, e.g., 2nd Tuesday of the month due. Select Last to handle scenarios in which there are five weeks in a month. The system sets the due date to the last week of the month.
Note: Perform On is only available for duplicate PMs, and is not available for daily or weekly frequencies.

20 Production Priority—Enter the production priority to assign to resulting work orders.
   The system automatically populates Production Priority Desc.
   
   Note: The system populates Production Priority Desc. on resulting PM work orders whose
   equipment have Track Resources selected.

21 Req. Start Date Buff. (Days)—Enter the number of days for which to buffer the requested start
date.
   Note: The system populates Req. Start Date on resulting PM work orders, based on this buffer,
   whose equipment have Track Resources selected.

22 Req. End Date Buff. (Days)—Enter the number of days for which to buffer the requested end date.
   Note: The system populates Req. End Date on resulting PM work orders, based on this buffer,
   whose equipment have Track Resources selected.

23 Revision Status—Select the status for the current revision of the PM schedule.
24 Revision Reason—Enter an explanation of any revisions to the PM schedule.
25 Revision Status—Enter the revision status for the route. The system automatically populates
   Revision.
   Note: You can enter a Revision Status only if the PMRVCTRL installation parameter is set to Yes.
   Contact your system administrator for more information.

26 WO Type—Select the work order type for the PM schedule.
27 Duration—Enter the duration of the work order for the PM schedule.
28 Approval List—Enter the approval list for the PM schedule.
29 WO Class—Enter the class of the work order. The classes shown belong to the EVNT entity. The
   system automatically populates WO Class Org.
30 Supervisor—Enter the supervisor for the PM schedule.
31 Priority—Select the priority level of the PM schedule.
32 Click Save Record.

Defining activities of PM work orders

To define activities of PM work orders:

1  Open the PM Schedules form.
2  Select the PM schedule for which to define activities, and then click the Activities tab.
3  Click Add Activity.
   The system automatically populates Activity with the next available line number, and it also populates
   People Required, Start, and Duration with a default value of 1.
4 **Activity**—Enter a unique code identifying the activity number. If you do not provide a number, the system enters a number, starting at 1 and increasing by 1 for each record.

5 **Trade**—Enter the trade to perform this activity.

6 **Task**—Enter the task code for this activity.

7 **Task Qty.**—Enter the required number of units of the task to associate with the activity, and then select the unit of measure in the adjacent field.

8 **Material List**—Enter the material list for this activity.

9 **Estimated Hours**—Enter the number of estimated hours for the activity.

10 **People Required**—Enter the number of people needed to complete the activity.

11 **Start**—Enter 1 if the activity is to start on the same day that the standard work order starts. Enter 2 if the activity should start on day 2 of the standard work order, etc.

12 **Duration**—Enter the duration of the activity in days.

13 **Hired Labor**—Select to indicate that the activity will be completed by an external source.

   Complete steps 14-20 only if you use the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS).

   **Note:** Depending on your system configuration, the VMRS-related fields may not be displayed. Contact your system administrator for more information.

14 **Reason For Repair**—Enter the reason the vehicle needs repair (Code Key 14).

15 **Work Accomplished**—Enter the work performed on the vehicle (Code Key 15).

16 **Technician Part Failure**—Enter the reason the technician or supplier thinks the vehicle failed (Code Key 18).

17 **Manufacturer**—Enter the Manufacturer/Supplier Code (Code Key 34) to associate with the vehicle.

18 **System Level**—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, needing repair (Code Key 31).

19 **Assembly Level**—Enter the VMRS code identifying the subsystem needing repair (Code Key 32).

   The values available are based on the system-level code.

20 **Component Level**—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.

21 **Activity Comments**—Enter any comments relevant to the activity.

22 **Click Submit.**

   **Note:** To delete the activity from the PM schedule, select the activity to delete, and then click **Delete Activity.**

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**Defining equipment for PM schedules**

Define equipment for PM schedules on the **Equipment** page of the **PM Schedules** form.

**Note:** If you edit the length of a linear equipment record, the system may automatically edit associated PM records when installation parameter PMRVCTRL is set to No. If the new equipment length falls on
or within the length of the PM, the system automatically updates the To Point of the PM record based on the new equipment length. If the new equipment length falls outside of the length of the PM, the system does not update the PM record.

To define equipment for PM schedules:

1. Open the PM Schedules form.
2. Select the PM schedule for which to define equipment, and then click the Equipment tab.
3. Click Add Equipment.
   The system automatically populates Date of Last Work Order with the Due Date of the current work order for the PM. If the work order is a duplicate PM, the system displays the latest date.
4. Equipment—Enter the equipment for which to define a PM schedule.
   The system automatically populates the equipment description, Department, Cost Code, and Assigned To.
5. Work Order Org.—Enter the organization to which the work order belongs if you use multi-organization security.
6. Department—Enter the department of the work order.
7. Location—Enter the location.
   The system automatically populates Loc. Org.
8. Route—Enter the route for the PM equipment.
   If the ROUTEEOB installation parameter is set to Y, a Route is specified on the PM schedule, and the PM schedule Type is either Fixed or Variable, then the system will also create MEC work orders for the route equipment (as indicated by the setting of the MEROUTWO installation parameter). The system generates the MEC work orders in addition to the initial PM work order when the PPMSTAT installation parameter is set to R (Released), and the system automatically selects Multiple Equipment on the PM work order header.
   Note: Updating the Route for an existing PM equipment does not affect the creation or deletion of MEC work orders for any existing PM work orders that are pending for the PM equipment.
9. Perform Every—Enter the length of the interval of time to pass before the system generates the next PM routine work order. You can enter any value between 0 and 99999, and then select the unit of measure in the adjacent field. The unit of measure for the PM period can be days, weeks, months, quarters, or years.
10. Due Date—Enter the due date of the first work order.
    Note: Each work order determines the due date of the following work order. If you update the Due Date on the Equipment page, the system updates the work order Due Date so that this due date is later than the last work order completion date. The system adds the interval to the entered Due Date on the Equipment page until a date later than the last completion date is reached. Future due dates are accepted without validation.
   After a work order is generated for a PM, the system automatically updates Due Date and Meter Due on the Equipment page of the PM Schedules form to reflect the next anticipated time that the PM will be performed on the associated equipment. The system automatically synchronizes the Due Date on the Work Orders page of the PM Schedules form with a generated work order when
a new work order is completed or when the **Due Date** is updated on a work order, which includes any minor work orders that are awaiting release when a major PM work order is completed.

11 **Dormant Start**—Enter the date on which the dormant period for the PM begins.

12 **Dormant End**—Enter the date on which the dormant period for the PM ends.

13 **Reuse Dormant Period**—Select to use the same specified dormant period for the PM on a yearly basis. If you select **Reuse Dormant Period**, the system automatically updates the specified **Dormant Start** and **Dormant End** dates after the dormant period has elapsed.

14 **Test Point Set**—Enter the test point set for calibration of the equipment.

   **Note:** Depending on your system configuration, **Test Point Set** may not be displayed. Contact your system administrator for more information.

   If the work order is a calibration work order, the system copies the test points for the specified equipment record to the work order when it is released. The system copies the test points related to the selected **Test Point Set**.

15 **PM Type**—Choose one of the following PM routine types:

   • **Fixed**—Select for the system to issue the PM based on a fixed schedule, e.g., based on date or reading when the last PM was originally due.

   • **Variable**—Select for the system to issue the PM based on a variable schedule, e.g., based on the date or reading on which the last PM was completed.

   • **Duplicate**—Select to allow multiple PM work orders to be open at the same time.

   **Note:** Selecting **Duplicate** as the PM type enables you to create an exception to the rule that a PM equipment may have only one open work order for the PM work order at a time.

16 **WO Class**—Enter the class of the work order.

   The system automatically populates **WO Class Org**.

17 **Cost Code**—Enter the cost code associated with the PM.

18 **Assigned To**—Enter the person responsible for the equipment.

19 **Supervisor**—Enter the supervisor for the equipment.

20 **Date Deactivated**—Enter the date after which work order generation stops.

21 **Meter Interval**—Enter the length of the interval of time indicating how frequently the first meter is used/read, e.g., 30 to indicate that the first meter is read every 30 days, and then enter the unit of measure for the first meter that triggers release on usage in the adjacent field.

22 **Meter Due**—Enter the reading due value for the first meter.

   **Note:** Each work order determines the due reading of the following work order. If you update **Meter Due** on the **Equipment** page, the system updates the work order **Meter Due** so that this due reading is higher than the reading on the last work order completed. The system adds the interval to the entered **Meter Due** on the **Equipment** page until a reading higher than the reading on the last work order completed is reached. Future due readings are accepted without validation.

23 **Meter #2 Interval**—Enter the length of the interval of time indicating how frequently the second meter is used/read, e.g., 30 to indicate that the second meter is read every 30 days.

24 **Meter #2 Due**—Enter the reading due value for the second meter.
25 Perform On—Enter the week of the month and the day of the week on which to perform the work on the equipment, e.g., 2nd Tuesday of the month due. Select Last to handle scenarios in which there are five weeks in a month. The system sets the due date to the last week of the month. Enter Linear Reference Details.

26 Click Submit.

Note: To delete equipment from the PM schedule, select the equipment to delete, and then click Delete Equipment.

Viewing work orders per PM schedule

View work order information associated with each PM Schedule.

To view work orders per PM Schedule:

1 Open the PM Schedules form.
2 Select the PM schedule for which to view work orders, and then click the Work Orders tab.
3 View the work orders per PM Schedule.

Note: The PMCRPAST installation parameter specifies whether or not the system can release a new fixed PM work order with a due date in the past. See in the Infor EAM System Administrator's Guide.

Viewing comments for PM work order activities

View comments for PM work order activities to access comments entered for PM work order activity records. See "Defining activities of PM work orders" on page 446.

To view comments for PM work order activities:

1 Open the Work Orders form.
2 Select the PM work order for which to view comments, and then click the Activities tab.
3 Select the activity for which to view comments, and then click View PM Activity Comments.
   The system automatically selects Print with Document if the comments are selected for printing on the work order activity. See "Entering comments" on page 60.
4 Language—Select the language for which to view the comments.
5 View the comments.
6 Click Close.
Requesting tools for PM work orders

Request tools from a department for specified PM work order activities. Record tool requirements of multiple activities for a specified work order.

To request tools for work orders:

1. Open the PM Schedules form.
2. Select the PM schedule for which to request tools, and then click the Tools tab.
   
   **Note:** You must enter an activity for the work order before you request a tool. See "Defining activities of PM work orders" on page 446.

3. Click Add Tool.
4. **Activity-Trade**—Select the appropriate activity-trade for the work order.
   
   **Note:** The system automatically populates the activity-trade value if only one activity-trade exists for the selected work order. When two or more exist, Activity-Trade must be selected from the list.

5. **Tool**—Enter the tool required to complete the activity.
   
   The system automatically populates the description of the tool and Tool Org.

6. **Hours Requested**—Enter the number of hours the tool is needed for the activity.
7. **Quantity Required**—Enter the number of tools needed to complete the activity.
8. Click Submit.

   **Note:** To remove a tool, select the tool to remove, and then click Remove Tool.

Adding safety hazards and precautions to PM schedules

Add hazards and precautions to PM schedules that inform your employees on how to use equipment safely when working in hazards that can cause bodily harm and alert them in advance of the precautions to take to protect themselves from the hazard. For example, you can add a precaution to turn equipment off and remove the power cord from the power outlet before performing repairs on electrical equipment.

If PMRVCTRL is set to YES, existing safety records can only be modified when the PM schedule Revision Status is Unfinished.

To add safety hazards and precautions to PM schedules:

1. Open the PM Schedules form.
2. Select the PM schedule for which to add safety precautions and hazards, and then click the Safety tab.
3. Click Add Safety Record.
4. **Hazard**—Enter the hazard to add to the PM schedule. The system automatically populates a description of the hazard, Hazard Org., and Hazard Type.
5 **Precaution**—Enter the safety measure to protect your employees from the hazard. The system automatically populates a description of the precaution, **Precaution Org.**, **Timing**, **Sequence**, and **Precaution Revision**.

6 **Timing**—Select the timing which is used to identify when the precaution should be taken. For example, if your employee is working with fire, you can enter the timing of pre-work to alert the employee that they should wear fire-resistant clothing before beginning the task.

7 **Sequence**—Enter the sequence number which is used to identify the order in which your employee should be made aware of the precaution. All precautions are important regardless of the sequence number entered.

8 **Delete Pending**—Select to delete the pending safety record during the next review.

9 Click **Submit**. The system automatically populates **CreatedBy** and **Date Created**.

---

### Releasing PM work orders

Release PM work orders awaiting execution in a batch. Select the work orders to be released by changing the **WO Status** and updating the **Scheduled Start Date**.

After the system completes the batch release process, the system retains the records that have been successfully updated in the Release PMs list enabling you to print the released PM work orders individually or in a batch.

If you have established a nesting reference between major and minor PMs to bypass a minor PM that coincides with the release of a major PM, the system bypasses the minor PM as indicated by the nesting reference. See "Creating preventive maintenance work orders" on page 441.

**Note:** The system can only bypass a minor PM if the minor PM is currently associated with an existing major PM with a status of Released, regardless of a specified back or forward nesting tolerance.

To release PM work orders:

1 Open the **Release Individual PM Work Orders** form.
   The system retrieves all PM work orders with a **WO Status** (system status or user status equivalent) of Awaiting Release.
   The system automatically populates **WO Status**, **Scheduled Start Date**, **Work Order**, **PM**, **Equipment Type**, **Equipment**, **Equipment Description**, **Equipment Org.**, **WO Type**, **WO Due Date**, **Department**, **Location**, **Location Org.**, **Priority**, **Period**, **Interval**, **Reading Due**, and **ErrorMessage** (for updates) for each record.

2 Select the PM work order to release.

3 **WO Status**—Change the status of the PM work order to **R** (Released).

4 **Scheduled Start Date**—Update the scheduled start date for the PM work order if necessary. Any changes made to the start date shifts the activity start date but does not affect the duration for the work order.

5 **Print All Released PMs**—Select to release all PM work orders with a **WO Status** of Released.

   **Note:** To print all PMs, select **Print All Released PMs** and then click **Update PMs**. The system updates the PM work orders, and then prints all of the released PM work orders.
6 Update additional PM work orders as necessary.

7 Click Update PMs. The system generates the PM work orders for the selected records. The system also retains the records that have been successfully updated in the Release PMs list enabling you to print the released PM work orders individually.

Note: To print individual PMs, select the PM work order, and then click Print Selected Released PM. If the selected PM work order has a WO Status of Released and there are no unsaved changes for the record, then the system prints the selected PM work order based on the report definition for the Release PMs form.

If a PM work order is associated with a Route and the ROUTEEOB installation parameter is set to Y, then the system creates MEC work orders for each equipment on the route as indicated by the setting of the MEROUTWO installation parameter. See “Adding equipment to work orders to split work order costs” on page 398.

If the route equipment on the work order header is associated with calibration data/test points, the system only copies the calibration data/test points to the related MEC work orders created by the system and not to the work order header.

The MEROUTWO installation parameter identifies which equipment to copy to route-based PM work orders created by the system for multiple equipment records on the work order. See in the System Administrator’s Guide. If the AUTOPMCL installation parameter is set to YES, the system automatically closes all released minor PM work orders when the major PM with which they are associated is released.

Understanding PM work packages

A PM work package consists of PM work orders of the same period that have been grouped together under a single "umbrella" work order. PM work packages function similarly to batch processes, and they can be released together at the same time. Before creating a PM work package, gather an inventory of period-based PMs that have been flagged for use in work packages.

Creating and editing PM work packages

Create multiple PM work orders for equipment, and then package them together so that they release at the same time.

To create and edit PM work packages:

1 Open the PM Work Packages form.
2 Click New Record.
3 Organization—Enter the organization to which the work package belongs.
4 PM Work Package—Enter a unique code identifying the work package, and then enter a description of the work package in the adjacent field.
5 **Class**—Enter the class of the work package.
The system automatically populates **Class Org**.

6 **WO Type**—Select the work order type of the work package.

7 **Parent Equipment**—Enter the equipment on which to perform the work package.
The system automatically populates **Parent Equipment Org** and **Department**.

8 **Department**—Enter the department to which the work package belongs.

9 **WO Status**—Select the work order status of the umbrella work order under which the work package is created.

10 **Trade**—Enter the trade performing the work package.

11 **WO Class**—Enter the work order class of the work package.
The system automatically populates **WO Class Org**.

12 **PM Type**—Select the PM type of the work package.

13 **Due Date**—Enter the date that the work package should begin.

14 **Perform Every**—Enter the length of the interval of time to pass before the system generates the next PM routine work order. You can enter any value between 1 and 99999, and then select the unit of measure in the adjacent field. The unit of measure for the PM period can be days, months, quarters, or years.

15 **Duration**—Enter the estimated number of days needed to complete the entire work package.

16 **People Required**—Enter the number of people required to complete the work package.

17 **Est. Workload**—Enter the estimated number of hours needed to complete the work package.
The system automatically populates **Calc. Workload**, **Last Parent WO**, and **Changed**.

**Note:** The system calculates **Calc. Workload** based on the sum of the estimated workload for each PM work order.

18 Click **Save Record**.

---

**Defining equipment for PM work packages**

Define and specify equipment to include on PM work packages.

To define equipment for PM work packages:

1 **Open the PM Work Packages form.**

2 **Select the PM work package for which to define equipment, and then click the Equipment tab.**

3 **Click Add Equipment.**

4 **Equipment**—Enter the equipment to add to the PM work package. The system automatically populates the equipment description.

**Note:** The system displays PM equipment for selection if the PM equipment is marked as work package on the PM header, the PM equipment is a child or grandchild of the parent equipment on the work package header, and meets the following criteria:

- the status of the PM schedule is **Approved**
• the PM equipment's period UOM and type match the period UOM and type of the work package header
• PM equipment Perform Every and Perform On match the work package header
• the PM equipment is not currently assigned to another PM work package
• the PM equipment record is not locked by a scheduling or forecasting session
• If DEPTSEC=ON, the system displays equipment records if the department of the equipment has corresponding records on the Department Security tab of the logged in user and is not marked read-only
• the PM equipment is a child or grandchild of the parent equipment on the work package header

5 Click Submit.

Note: To remove equipment from the PM work package, select the equipment to remove, and then click Remove Equipment.

Scheduling employees for PM work packages
Schedule employees to accomplish all of the activities of all the PM equipment listed on a work package.

To schedule employees for PM work packages:

1 Open the PM Work Packages form.
2 Select the PM work package for which to schedule employees, and then click the Employees tab.
3 Click Add Employee.
4 Employee—Enter the employee to assign to the PM work package. The system automatically populates Name.
5 Click Submit.

Note: To remove an employee from a PM work package, select the employee to remove, and then click Remove Employee.

Defining equipment parameters for PM forecasting
Define parameters to select the equipment and PMs for which to forecast preventive maintenance.

To define equipment parameters for PM forecasting:

1 Open the PM Forecasting form.
2 Parameter List—Select the saved selection parameters. The system retrieves the saved selection criteria.
3 Forecast Start Date—Enter the estimated start date for the forecasting session.
4 Forecast End Date—Enter the estimated end date for the forecasting session.
5 **Session ID**—Enter the ID for the session.

   **Note:** Enter **Session ID** if you are working on an existing session. If you are creating a new session, the system automatically populates **Session ID** after you click **Process**.

6 **Equipment**—Enter the equipment for which to forecast preventive maintenance.

7 **Top Level**—Enter the top level equipment. The system does not display on the **Preview** page any equipment above the selected equipment in the structure.

8 **Type**—Enter the type of equipment.

9 **Class**—Enter the class of the equipment.

10 **Category**—Enter the category of the equipment.

11 **Criticality**—Enter the criticality code to indicate the relative importance of the equipment to the overall production of PM.

   Follow these steps to define PM parameters.

12 **PM Schedule**—Enter the PM schedule.

13 **Class**—Enter the class of the PM schedule.

14 **Nesting Reference**—Enter the nesting reference for the PM schedule.

15 **Priority**—Enter the priority of the PM schedule.

16 **WO Type**—Enter the work order type of the PM.

   Follow these steps to define PM equipment parameters.

17 **Work Order Org.**—Enter the work order organization of the PM.

18 **WO Class**—Enter the class of the work order of the PM.

19 **Department**—Enter the department of the PM equipment.

20 **Location**—Enter the location of the PM equipment.

21 **Assigned To**—Enter the person responsible for the PM equipment.

22 **Cost Code**—Enter the cost code of the PM equipment.

23 **Supervisor**—Enter the supervisor for the PM equipment.

   Follow these steps to select the options for generating PM work orders.

24 **Parent Equipment Type**—Select to display **Parent**, **Parent Org.**, and **Parent Description** for each equipment displayed on the **Preview** page.

25 **Include Children**—Select to include the children of the selected equipment in the list of equipment for which to forecast PMs.

26 **Minimum PM Frequency (Days)**—Enter a number to determine whether the system will include or exclude PMs for equipment with periods less than the number of days specified.

27 **Enable Child Equipment Tab**—Select to enable the **Child Equipment** page so that the system displays the page.

   Follow these steps to select the forecasting options.

28 **Work Order Background Color**—Enter the background color for the work order.

29 **Actual Due Date Background Color**—Enter the background color for the actual due date.

30 **Forecast PM Background Color**—Enter the background color for the forecasted PMs.

31 **Weekend Background Color**—Enter the background color for weekends.

32 **Locked PM Due Date Text Color**—Enter the text color for locked PM due dates.

33 **Perform On Day Text**—Select one of the following options for the text type for which to display the value for **Perform On Day**.
• **Underscore**—Select to display the text value for **Perform On Day** as Underscore type.

• **Italics**—Select to display the text value for **Perform On Day** as Italics type.

34 **Yearly Designator**—Enter a value to designate a year, e.g., *Y* for Yearly.

35 **Quarterly Designator**—Enter a value to designate a quarter, e.g., *Q* for Quarterly.

36 **Monthly Designator**—Enter a value to designate a month, e.g., *M* for Monthly.

37 **Weekly Designator**—Enter a value to designate a week, e.g., *W* for Weekly.

38 **Daily Designator**—Enter a value to designate a day, e.g., *D* for Daily.

39 **Work Hours per Day**—Enter the number of hour per workday.

   - **Note:** The system automatically populates **Work Hours per Day** based on the WORKDAY installation parameter. **Work Hours per Day** is used by the View Resource Load popup and the Resource Load Graph on the **Forecasting** page.

40 **Maximum Rows per Page**—Enter the maximum number of rows of equipment to display on the **Forecasting** page.

   - **Note:** The system defaults 20 rows per page as the maximum. Entering a value greater than 20 may cause the system to delay the performance.

41 **Prevent Separation Greater than 1 Period Between Forecast Start Date and new PM Due Dates**—Select to prevent the due date from being greater than 1 frequency after the forecasted start date.

42 **Prevent new PM Due Dates prior to Forecast Start Date**—Select to prevent new PM due dates prior to the forecasted start date when no work orders exist for the PM. If a work order exists for the PM the system prevents the separation between the work order and the first PM due date from exceeding the frequency.

43 **Allow Session Approval with Active Warnings**—Select to allow the system to approve sessions with active warnings.

44 **Click Process.** The system displays the **Preview** page listing all of the equipment for which to forecast PMs.

   - **Note:** When **Process** is clicked, the system protects the fields and does not allow editing of these values for the current session.

   When **Process** is clicked, the system only considers the Equipment parameters, work order organization, and the **Include Children** checkbox to present equipment on the **Preview** page. The remaining parameters are not considered when building the Preview list.

---

**Understanding PM forecasting**

Forecast preventive maintenance for equipment beyond creating PM work orders. Define parameters to gather a group of selected equipment for which to forecast preventive maintenance. Forecasting PMs allows you to view the preventive maintenance on equipment for a selected period of time as
much as one year in advance. Adjust the due dates for preventive maintenance as necessary to balance
the resource workload.

**Note:** Due dates can only be updated for forecasted PMs. For existing PM work orders, the due date
cannot be changed.

The system will not forecast preventive maintenance for equipment used in a PM work package.

The system supports only frequency-based PMs on the **PM Forecasting** form. Meter-based PMs are
not supported.

The system supports only duplicate PMs on the **PM Forecasting** form. Fixed and variable PMs are
not supported.

### Defining equipment parameters for PM forecasting

Define parameters to select the equipment and PMs for which to forecast preventive maintenance.

To define equipment parameters for PM forecasting:

1. Open the **PM Forecasting** form.
2. **Parameter List**—Select the saved selection parameters. The system retrieves the saved selection
criteria.
3. **Forecast Start Date**—Enter the estimated start date for the forecasting session.
4. **Forecast End Date**—Enter the estimated end date for the forecasting session.
5. **Session ID**—Enter the ID for the session.
   
   **Note:** Enter **Session ID** if you are working on an existing session. If you are creating a new session,
   the system automatically populates **Session ID** after you click **Process**.

6. **Equipment**—Enter the equipment for which to forecast preventive maintenance.
7. **Top Level**—Enter the top level equipment. The system does not display on the **Preview** page any
equipment above the selected equipment in the structure.
8. **Type**—Enter the type of equipment.
9. **Class**—Enter the class of the equipment.
10. **Category**—Enter the category of the equipment.
11. **Criticality**—Enter the criticality code to indicate the relative importance of the equipment to the
overall production of PM.
   
   Follow these steps to define PM parameters.
12. **PM Schedule**—Enter the PM schedule.
13. **Class**—Enter the class of the PM schedule.
14. **Nesting Reference**—Enter the nesting reference for the PM schedule.
15. **Priority**—Enter the priority of the PM schedule.
16. **WO Type**—Enter the work order type of the PM.
   
   Follow these steps to define PM equipment parameters.
17. **Work Order Org.**—Enter the work order organization of the PM.
18 WO Class—Enter the class of the work order of the PM.
19 Department—Enter the department of the PM equipment.
20 Location—Enter the location of the PM equipment.
21 Assigned To—Enter the person responsible for the PM equipment.
22 Cost Code—Enter the cost code of the PM equipment.
23 Supervisor—Enter the supervisor for the PM equipment.

Follow these steps to select the options for generating PM work orders.

24 Parent Equipment Type—Select to display Parent, Parent Org., and Parent Description for each equipment displayed on the Preview page.

25 Include Children—Select to include the children of the selected equipment in the list of equipment for which to forecast PMs.

26 Minimum PM Frequency (Days)—Enter a number to determine whether the system will include or exclude PMs for equipment with periods less than the number of days specified.

27 Enable Child Equipment Tab—Select to enable the Child Equipment page so that the system displays the page.

Follow these steps to select the forecasting options.

28 Work Order Background Color—Enter the background color for the work order.
29 Actual Due Date Background Color—Enter the background color for the actual due date.
30 Forecast PM Background Color—Enter the background color for the forecasted PMs.
31 Weekend Background Color—Enter the background color for weekends.
32 Locked PM Due Date Text Color—Enter the text color for locked PM due dates.
33 Perform On Day Text—Select one of the following options for the text type for which to display the value for Perform On Day.
   • Underscore—Select to display the text value for Perform On Day as Underscore type.
   • Italics—Select to display the text value for Perform On Day as Italics type.

34 Yearly Designator—Enter a value to designate a year, e.g., Y for Yearly.
35 Quarterly Designator—Enter a value to designate a quarter, e.g., Q for Quarterly.
36 Monthly Designator—Enter a value to designate a month, e.g., M for Monthly.
37 Weekly Designator—Enter a value to designate a week, e.g., W for Weekly.
38 Daily Designator—Enter a value to designate a day, e.g., D for Daily.
39 Work Hours per Day—Enter the number of hour per workday.

   Note: The system automatically populates Work Hours per Day based on the WORKDAY installation parameter. Work Hours per Day is used by the View Resource Load popup and the Resource Load Graph on the Forecasting page.

40 Maximum Rows per Page—Enter the maximum number of rows of equipment to display on the Forecasting page.

   Note: The system defaults 20 rows per page as the maximum. Entering a value greater than 20 may cause the system to delay the performance.
41 Prevent Separation Greater than 1 Period Between Forecast Start Date and new PM Due Dates—Select to prevent the due date from being greater than 1 frequency after the forecasted start date.

42 Prevent new PM Due Dates prior to Forecast Start Date—Select to prevent new PM due dates prior to the forecasted start date when no work orders exist for the PM. If a work order exists for the PM the system prevents the separation between the work order and the first PM due date from exceeding the frequency.

43 Allow Session Approval with Active Warnings—Select to allow the system to approve sessions with active warnings.

44 Click Process. The system displays the Preview page listing all of the equipment for which to forecast PMs. The system automatically populates Session ID for new sessions.

Note: When Process is clicked, the system protects the fields and does not allow editing of these values for the current session.

When Process is clicked, the system only considers the Equipment parameters, work order organization, and the Include Children checkbox to present equipment on the Preview page. The remaining parameters are not considered when building the Preview list.

Forecasting PMs

View and adjust the due dates for selected equipment in a forecasted PM session to balance the PM workload. Drag and drop dates as necessary to change due dates and balance the workload.

Note: The system displays existing PM work orders with a Released or Completed status on this form; however, their due dates cannot be changed.

To forecast PM's:

1 Open the PM Forecasting form.
2 Choose one of the following options:
   • For a new session—Enter the appropriate parameters.
     Note: You must select equipment for which to forecast PMs on the Preview page. To begin PM forecasting, click Start PM Forecasting on the Preview page.
     To view the Preview page, select Tab Available on the Child Equipment page for your user group, and then select Enable Child Equipment Tab on the Parameters page of the PM Forecasting form. Contact your System Administrator for more information.
   • For an existing session—Enter the Session ID. The system automatically populates the parameters for the existing session. Click the Forecasting tab.
3 Select the equipment for which to forecast PMs on the Preview page, and then click the Forecasting tab, or click Start PM Forecasting on the Preview page. Drag and drop date cells as necessary to change due dates and balance the workload.
**Note:** The system locks all PM equipment records related to the selected equipment and PMs. The system does not allow changes to the PM equipment record or PM generation until after the forecasting session is **Approved** or **Cancelled**. The system displays the **Session ID** responsible for locking the record on the PM equipment record.

To cancel the forecasting session, click **Cancel Session**.

If a PM is brought into the session via parameters selected and the PM equipment is selected on the **Preview** page, the system automatically includes all PMs in the nest regardless of whether or not the other PMs in the nest meet the selected criteria.

All PMs in a nest for specific equipment are represented by a single row on the **Forecasting** page, i.e. all frequencies in the nest are represented on the calendar portion of the row. Otherwise a row represents a unique PM and equipment.

### Understanding PM forecasting options

There are several options available for adjusting the due dates for forecasted PMs.

See the following table for a list of icons available:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Legend</td>
<td>View the calendar legend</td>
<td>The system displays the calendar legend with the parameters set on the <strong>Parameters</strong> page.</td>
</tr>
<tr>
<td>Validate Session</td>
<td>Validate all records in a session to see if any active warnings exist</td>
<td>The system displays any active warnings. To ignore an active warning, select <strong>Ignore Warning</strong>, and then click <strong>Submit</strong>. The system ignores the warning and validates the session.</td>
</tr>
<tr>
<td>Process</td>
<td>Process all due date changes and approve a session</td>
<td>The system updates all relevant PM equipment records with the new due dates and <strong>Perform On Day</strong> information, if a perform on day was set. The system does not approve sessions with active warnings unless <strong>Allow Session Approval with Active Warnings</strong> is selected on the <strong>Parameters</strong> page.</td>
</tr>
<tr>
<td>View Resource Load</td>
<td>View the resource load required to perform PMs</td>
<td>The system displays the View Resource Load popup.</td>
</tr>
<tr>
<td>Run Resource Load Graph</td>
<td>Run the resource balance report</td>
<td>The system initiates the view resource load report for the current session.</td>
</tr>
</tbody>
</table>
The system initiates the maintenance cost report for the current session.

### Run the future maintenance cost report

#### Icon

Run Future Maintenance Cost Report

#### Description

Run the future maintenance cost report

#### Results

The system initiates the maintenance cost report for the current session.

### Cancel Session

#### Icon

Cancel Session

#### Description

Delete and cancel a session

#### Results

The system cancels the session, and then displays the Parameters page. The system deletes the Session ID.

### Previous Month

#### Icon

Previous Month

#### Description

View the same day of the previous month

#### Results

The system displays the same day of the previous month. If the same day does not exist in the previous month, the system displays the last day in the previous month.

### Next Month

#### Icon

Next Month

#### Description

View the same day of the next month

#### Results

The system displays the same day of the subsequent month. If the same day does not exist in the subsequent month, the system displays the last day of the next month.

There are several right-click options available for PM equipment. To view and choose the options, right-click on the PM equipment record, and then select the appropriate right-click option.

See the following table for the available right-click options:

<table>
<thead>
<tr>
<th>Right-click Option</th>
<th>Description</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Equipment Details</td>
<td>View details for PM equipment</td>
<td>The system displays the View Equipment Details popup.</td>
</tr>
<tr>
<td>Update PM Due Date</td>
<td>Update a PM Due Date</td>
<td>The system displays the Update Due Date popup.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> If the record represents a nest, the system displays all PMs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>in a nest.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Original Due Date</strong> is the PM due date as it exists currently in the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>system. <strong>Due Date</strong> is the PM due date as it exists within the current</td>
</tr>
<tr>
<td></td>
<td></td>
<td>session.</td>
</tr>
<tr>
<td>Validate Record</td>
<td>Validate a single record in a session</td>
<td>If the validation fails, the system displays the failures in the Valida-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>tion Warnings popup.</td>
</tr>
</tbody>
</table>

462 | Infor EAM – User's Guide
There are numerous right-click options available on a calendar grid cell. To view and choose the options, right-click on the calendar grid cell, and then select the appropriate right-click option.

See the following table for the available right-click options:

<table>
<thead>
<tr>
<th>Right-click Option</th>
<th>Description</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>View WO Details</td>
<td>View the details of a work order</td>
<td>The system displays the View Work Order Details popup.</td>
</tr>
<tr>
<td>View PM Details</td>
<td>View the details of a PM</td>
<td>The system displays the View PM Details popup.</td>
</tr>
<tr>
<td>Shift PM Schedule</td>
<td>Shift the PM schedule</td>
<td>The system shifts the PM schedule.</td>
</tr>
<tr>
<td>Lock PM Due Date</td>
<td>Lock the PM Due Date</td>
<td>The system locks the PM Due Date.</td>
</tr>
<tr>
<td>Unlock PM Due Date</td>
<td>Unlock the PM Due Date</td>
<td>The system unlocks the PM Due Date.</td>
</tr>
</tbody>
</table>

Viewing the resource load

View the resource loading required for the current PM forecasting session to determine the number of resource days required to complete the work. View the number of estimated hours and resource days required by trade per month, week, or day in the forecasting session. Modify the date ranges to plan PMs for a specific time period, and then make changes to the underlying PM forecasting session to balance the resource load. This popup considers both Released and Forecasted PMs.

To view the resource load:

1. Open the PM Forecasting form.
2. Choose to create a new PM forecasting session or work with an existing PM forecasting session.
3. Click View Resource Load.
4. Start Date—Enter the starting date for the current PM forecasting session.
5. End Date—Enter the ending date for the current PM forecasting session. The system automatically populates Work Hours per Day based on the value on the Parameters page.
6. Select one of the following options:
   - Group by Day—Select to group the defined date range by days. The system displays the time period in days. Group Start Date matches Group End Date for each record. The system calculates Estimated Hours, Resource Day Requirements, and Total Resource Day Requirements by this selection.
• **Group by Week**—Select to group the defined date range by weeks. The system displays the time period in weeks. The system calculates **Estimated Hours**, **Resource Day Requirements**, and **Total Resource Day Requirements** by this selection.

• **Group by Month**—Select to group the defined date range by month. The system displays the date range records until the **EndDate** is the same as **Group End Date**.

**Note:** The system calculates **Resource Days Required** as:

\[
\text{Resource Days Required} = \frac{\text{Estimated Hours}}{\text{Work Hours per Day}}
\]

The system calculates **Resource Days Required** as the number of person-days required for the trade for the defined date range.

7 View the current resource load. Modify the PM due dates in the underlying PM forecasting session.

8 Click **Refresh Resource Data**.

The system automatically populates **Date Last Refreshed** and refreshes the data on the popup based on the current PM forecasting session

9 Click **Close**.

**Note:** The system does not automatically display the changes to the PM forecasting session made while the View Resource Load popup is open. To view the changes made in the grid, click **Refresh Resource Data**.

---

### Generating work orders

Create or update multiple work orders using the **Generate Work Orders** form.

The **Generate Work Orders** form consists of two pages: the **Parameters** page, on which you define the selection criteria for locating the work orders to process in the batch; and the **Preview** page, on which you can preview the work orders in the batch prior to actually processing them and select or unselect the work orders to process as necessary.

The **Generate Options** section of the **Parameters** page enables you to specify the manner in which the system processes the work orders during the batch generation process. **Release WOs for Fixed/Variable PMs** is selected by default, enabling the system to automatically release all PM work orders of **PM Type** Fixed or Variable with a **Status** of Awaiting release. When you unselect **Release WOs for Fixed/Variable PMs**, the system does not automatically release any fixed or variable PM work orders during the batch generation process.

If you choose to release fixed/variable PM work orders, the system releases the fixed or variable PM work orders based on their due dates. If you specified a dormant period for the equipment attached to the fixed/variable PM, the system temporarily postpones the release of the fixed/variable PM if the due date for the PM falls within the specified dormant period.

The system automatically recalculates the next due date for a fixed PM falling within a dormant period by incrementally adding the PM period to the due date until the due date for the PM is greater than the specified **Dormant End** date for the equipment.
The system recalculates the next due date for a variable PM falling within a dormant period by assigning the new due date as the next day following the specified Dormant End date for the equipment associated with the PM.

**Note:** Adding a dormant period to PM equipment does not affect any previously created or released PM work orders.

If you choose to release duplicate PMs, the system searches for any PMs that meet the parameter criteria. If PerformOn is specified for the PM equipment record, the system automatically adjusts the calculated Due Date based on PerformOn. Within the month in which the normally calculated Due Date falls, the system sets to the week of the month and day of the week defined by PerformOn for the PM equipment record.

The Preview page allows you to preview all of the work orders selected for processing based on the selection parameters, enabling you to select or unselect work orders to include in the batch generation process before you actually process the work order batch. You can select or unselect individual work orders for processing, or you can select or unselect all work orders for processing.

To generate work orders:

1. Open the Generate WOs form.
2. Organization—Enter the organization to which the work order belongs if you use multi-organization security.
3. Department, Supervisor, Equipment, Location, Assigned To, PM, PM Class, WO Type, and Cost Code—Enter one or all of these selection parameters for generating the work order batch.
4. Generate Through—Enter the date until which to process the work orders.
   **Note:** To generate all work orders meeting the specified selection criteria up to the current date, leave Generate Through blank.
5. Change WO Status—Select to change the work order status.
6. Current WO Status—Enter the current status of the work order.
7. New WO Status—Enter the status to which to change the current work order status.
8. Generate WOs for Repairable Spares—Select to generate work orders for repairable spares.
9. Store—Enter the store for which to generate work orders for repairable spares. The system automatically populates Store Org.
10. Generate PM Work Package—Select to create PM work orders for the parent equipment specified on a selected work package.
11. Department—Enter the department to which the work package belongs.
12. Work Package—Enter the code identifying the work package for which to generate a work order for the parent equipment.
13. WO Status—Enter the status of the work package.
14. Period—Enter the period under which the work package PM work orders were grouped.
15. Parent Equipment—Enter the parent equipment for which to generate PM work orders for all child equipment listed on the work package.
16. WO Type—Enter the work order type of the work package.
17. Release WOs for Fixed/Variable PMs—Select to create PM work orders that are of the type Fixed or Variable when processing the work order batch. The system releases the fixed PM work order’s status to the status specified in the WORKWOST installation parameter.
If the ROUTEEOB installation parameter is set to Y, a **Route** is specified on a PM schedule, and the PM schedule **Type** is either Fixed or Variable, then the system also creates MEC work orders for the route equipment (as indicated by the setting of the MEROUTWO installation parameter). The system generates the MEC work orders in addition to the initial PM work order when the PPMSTAT installation parameter is set to R (Released), and the system automatically selects **Multiple Equipment** on the PM work order header.

If AUTOPMCL installation parameter is set to YES, the system automatically closes all released minor PM work orders when a major PM is released. If the minor PM work orders being closed are multiple equipment work orders, then the system also closes all MEC work orders related to the minor PM work orders.

In the current version of the system, if the ROUTEEOB installation parameter is set to Y, the system creates MEC work orders when a parent work order is released for a route-based PM.

**Note:** In previous versions of the system (version 7.9 or earlier), if installation parameter ROUTEEOB is set to Y, the system created RC (route child) work orders when a parent work order was released for a route-based PM. See "Defining PM routes and equipment within routes" on page 442.

**18 Generate WOs for Duplicate PMs**—Select to create PM work orders that are of the type Duplicate when processing the work order batch. The system automatically assigns the status entered for the PPMSTAT installation parameter to the PM work orders created during the batch process and then releases the work order's status to the status specified in the WORKWOST installation parameter.

**Note:** The system does not generate work orders for PMs locked by a PM forecasting session.

**19 Generate WOs for Repairable Cores**—Select to create work orders for repairable core parts to be repaired internally. The system enables **Store** and it is required. The system populates **Store Org.** based on the selected **Store**. See "Generating work orders for repairable core parts" on page 467.

**20 Include Child Equipment**—Select to generate work orders for any child equipment of the selected **Equipment** when processing the work order batch.

**21 Release Other WOs**—Select to update other existing work orders that have the specified **Current WO Status**. The system enables **Current WO Status**, and it is required.

**22 Current WO Status**—Enter the current work order status for which to update existing work orders.

If you selected Release Other WOs and entered a **Current WO Status**, upon initiation of the work order generation process, the system locates and updates all existing work orders that have the specified **Current WO Status** and updates the status of the work orders to the value specified in the WORKWOST installation parameter.

**23 Print Summary Report**—Select to generate a summary report of all the generated work orders after the batch generation process is complete.

**24 Print Work Orders**—Select to print work order cards for the work orders created/updated when processing the work order batch.

**25 Click Process.** The system displays the **Preview** page listing all of the work orders meeting the selection criteria.

The **Preview** page retains the settings for **Print Work Orders** from the **Parameters** page. You can select or unselect **Print Work Orders** as necessary.

**26 Select**—Select each work order you wish to generate in the work order batch as necessary, or you can unselect each work order you do not wish to generate in the work order batch as necessary.
Note: To select all the work orders at once, check **Select**. To unselect all the work orders at once, uncheck **Select**.

The system does not display MEC work orders on the **Preview** page. However, the MEC work orders are generated/released when the parent multiple equipment work order is generated or released.

27 Click **Generate**. The system generates the work order for the selected records. If any errors occur, then the system changes the record's visual attribute to red and displays an error message in the **Error Message** column of the Preview list.

The system automatically copies **From Point**, unit of measure, **Ref. Description**, and **Geographical Ref.** and **To Point**, unit of measure, **Ref. Description**, and **Geographical Ref.** to work orders that are released for linear equipment PMs.

Note: If you have set up the system to require an electronic signature to authorize status changes to work order headers, the system displays the eSignature popup once for every work order in the work order batch for which there is a status change. See "Creating electronic records and signatures" for more information about signing electronic records.

---

**Generating work orders for repairable core parts**

Generate work orders for repairable core parts to be repaired internally. If you select to generate work orders for internal repairs, the system checks to see if there is a **Qty. for Repair** for any parts in store. If a positive quantity for repair exists, the system generates a work order of **Type** Repairable Core containing the part(s) to be repaired internally. If **Auto-Assign** and **Active** are on, the system automatically moves the part from **Qty. on Hand** to **Qty. at Shop** when the internal repair work order is generated.

To generate work orders for repairable core parts:

1. Open the **Generate Work Orders** form.
2. **Organization**—Enter the organization to which the work order belongs if you use multi-organization security.
3. **Department, Equipment, Location, PM, PM Class**, and/or **WO Type**—Enter one or all of these selection parameters for generating the work order batch.
4. **Generate Through**—Enter the due date through which to process the work orders.
   
   **Note:** To generate all work orders meeting the specified selection criteria up to the current date, leave **Generate Through** blank.
5. **Print Summary Report**—Select to generate a summary report of all the generated work orders after the batch generation process is complete.
6. **Print Work Orders**—Select to print work order cards for the work orders created/updated when processing the work order batch.
7. **Generate WOs for Repairable Cores**—Select to create work orders for repairable core parts to be repaired internally. The system enables **Store** and **it is required. The system populates Store Org.** based on the selected **Store**.
8 Click **Process**. The system displays the **Preview** page listing all of the work orders meeting the selection criteria.

The **Preview** page retains the settings for **Print Work Orders** from the **Parameters** page. You can select or unselect **Print Work Orders** as necessary.

9 **Select**—Select each work order you wish to generate in the work order batch as necessary.

   **Note:** To select all the work orders at once, check **Select**. To unselect all the work orders at once, uncheck **Select**.

10 Click **Generate**. The system generates the work order for the selected records. If any errors occur, then the system changes the record’s visual attribute to red and displays an error message in the **ErrorMessage** column of the Preview list.

   **Note:** If you set up the system to require an electronic signature to authorize status changes to work order headers, the system displays the eSignature popup once for every work order in the work order batch for which there is a status change.

See the following processing rules when generating work orders for repairable spare parts.

- If you selected **Use Stock Method** for a part on the **Repair Details** tab of the **Parts** form, the system calculates the **Qty. to Repair** based on the stock replenishment method specified for the part in the holding store. For example, you create a part OOV-REX-TRA-25G for which Min/Max is the **Stock Method** with a **Minimum Qty.** of 5 and a **Maximum Qty.** of 10. The current **Qty. on Hand** of OOV-REX-TRA-25G is 4 and the stock **Qty. for Repair** is 9. When you generate an internal repair work order for the part, the system calculates the **Qty. to Repair** on the work order as 6 parts rather than 9 to update the **Qty. on Hand** of the part in stock to the specified maximum of 10.

- If you do not select **Use Stock Method** for a part on the **Repair Details** tab of the **Parts** form, the system automatically generates the work order for the full **Qty. for Repair** on the **Repair Details** tab of the **Parts** form.

- If you do not select **Auto Assign** on the **Repair Details** tab of the **Parts** form, the system automatically generates the work order for a **Qty. Assigned** of 0, and you must use the Assign Repair Details popup on the work order to make assignments.

**Scheduling work**

View the current work order schedule, calculate labor availability, and view labor utilization. Schedule unscheduled or backlogged work orders. Reschedule work orders as necessary. Additionally, you can view work order comments, change the work order status, and freeze or unfreeze activity schedules. You may balance the workload on the **WO Load Balancing** form.

**Viewing the work order schedule**

View the work order schedule to gather information concerning current maintenance projects and to assist in future scheduling.
To view the work order schedule:

1 Open the **Work Order Scheduling** form.

2 **Organization**—Enter the organization for which to view schedules if you use multi-organization security.

3 **Schedule By**—Select one of the following options:
   - **Employee**—Select to view the schedule by employee. The system displays **Employee**. Enter, for **Employee**, the Employee for whom you wish to view the work order schedule for the date selected on the calendar.
   - **Trade/Department**—Select to view the schedule by trade/department. The system displays **Trade** and **Department**. Enter, for **Trade**, the trade for which you wish to view the work order schedule for the date selected on the calendar. You may also enter, for **Department**, the department for which you wish to view the work order schedule to further filter the trade records for the date selected on the calendar.

4 See this table when viewing the work order schedule.

<table>
<thead>
<tr>
<th>View</th>
<th>Procedure</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily schedule</td>
<td>Select from the calendar the day for which to view the schedule. The system displays the daily schedule in the top portion of the form.</td>
<td>Select Unscheduled WOs for <strong>Dataspy</strong> in the <strong>Activities</strong> section of the form.</td>
</tr>
<tr>
<td>Unscheduled work orders</td>
<td></td>
<td>Select Backlogged WOs for <strong>Dataspy</strong> in the <strong>Activities</strong> section of the form.</td>
</tr>
<tr>
<td>Backlogged work orders</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** To refresh the work order schedule, click **Refresh**.

### Calculating labor availability

Calculate the total number of hours that are available for work during a given period. Use the available hours to schedule labor.

**Organization**, **Trade**, and **Department** serve as filters for employees who are associated with specific organizations, trades, and departments. Enter an organization to calculate labor availability for all employees assigned to that organization and to an active shift. Enter a trade to calculate labor availability for all employees assigned to that trade and to an active shift. Enter a department to calculate labor availability for all employees assigned to that department and to an active shift. Finally, enter any combination of **Organization**, **Trade**, or **Department** to calculate labor availability for all employees that match that specific combination. Leave **Organization**, **Trade**, and **Department** empty to calculate labor availability for all active shifts.

**Note:** You have to assign the employee to a shift in order for the employee’s availability to be part of the calculation.
You may also calculate labor availability on the Record View page of the Employees form.

Note: Infor strongly recommends that you calculate labor availabilities before scheduling work orders in the system.

To calculate labor availability:

1. Open the Work Order Scheduling form.
2. Click Calculate Availability.
3. Enter the organization for which to calculate labor availability.
4. Enter the trade for which to calculate labor availability.
5. Enter the department for which to calculate labor availability.

   Note: The system totals employee exceptions for Trade and Department to calculate the total amount of labor hours available for a specific time-frame.

6. Enter the starting date and ending date of the period for which to calculate available labor.

   Note: End Date must be later than or equal to Start Date.
7. Click Calculate.
8. Click Close.

Viewing labor utilization

View labor utilization percentages for each calendar day.

To view labor utilization:

1. Open the Work Order Scheduling form.
2. Enter the organization for which to view labor utilization if you use multi-organization security.
3. Select one of the following options:
4. Select to view the schedule by employee. The system displays Employee. Enter, for Employee, the Employee for whom you wish to view the labor utilization for the date selected on the calendar.
5. Select to view the schedule by trade/department. The system displays Trade and Department. Enter, for Trade, the trade for which you wish to view the labor utilization for the date selected on the calendar. You may also enter, for Department, the department for which you wish to view the labor utilization to further filter the trade records for the date selected on the calendar.
6. Place the cursor over a calendar day to view the employee or trade/department utilization percentage for that day. The colors indicating labor utilization only appear on the calendar after you calculate labor availability. See this table when viewing the labor utilization.
<table>
<thead>
<tr>
<th>Color</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gray</td>
<td>Non-working day for the organization or no labor scheduled for this day.</td>
</tr>
<tr>
<td>Green</td>
<td>Total scheduled hours are less than total available hours, and labor utilization is less than 80%.</td>
</tr>
<tr>
<td>Yellow</td>
<td>Total scheduled hours are between 80% and 100% of total available hours.</td>
</tr>
<tr>
<td>Red</td>
<td>Total scheduled hours exceed the total available hours.</td>
</tr>
</tbody>
</table>

**Scheduling or rescheduling work orders**

Schedule unscheduled or backlogged work orders. Reschedule work orders as necessary.

To schedule or reschedule work orders:

1. Open the **Work Order Scheduling** form.
2. **Organization**—Enter the organization for which to schedule work if you use multi-organization security.
3. **Schedule By**—Select one of the following options:
   - **Employee**—Select to schedule by employee. The system displays **Employee**. Enter, for **Employee**, the Employee for whom you wish to schedule the work.
   - **Trade/Department**—Select to schedule by trade/department. The system displays **Trade** and **Department**. Enter, for **Trade** and **Department**, the trade and department for which you wish to schedule the work.
   - **Auto Refresh**—Select for the system to automatically refresh the Daily Schedule list after scheduling an activity on the calendar. If you do not select **Auto Refresh**, the activity will not automatically appear in the Daily Schedule list until you manually click **Refresh**.

See this table when scheduling or rescheduling work orders.

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule unscheduled work orders</td>
<td>Select Unscheduled WOs for <strong>Dataspy</strong> in the <strong>Activities</strong> section of the form, and then select a work order from the list and drag it to the day on the calendar for which to schedule it. The system creates a new work order schedule record.</td>
</tr>
<tr>
<td>Schedule backlogged work orders</td>
<td>Select Backlogged WOs for <strong>Dataspy</strong> in the <strong>Activities</strong> section of the form, and then select a work order from the list and drag it to the day on</td>
</tr>
</tbody>
</table>
### Viewing work order comments

View work order planning and work order activity-related comments on the **Work Order Scheduling** form.

To view work order comments:

1. Open the **Work Order Scheduling** form.
2. Select a work order for which to view comments from the Activities list, and then click **View Comments**.
3. **Comments Type**—Select one of the following options:
   - **Activity**—Select to view comments associated with the work order activity.
   - **Task Instructions**—Select to view task instructions associated with the task defined on the work order activity.
   - **Work Order**—Select to view work requested comments associated with the work order.
4. Click **Close**.

### Changing work order status

Change work order status on the **Work Order Scheduling** form.

To change work order status:

1. Open the **Work Order Scheduling** form.
2. Select a work order for which to view comments from the Daily Schedule list, and then click **Change WO Status**.
3. **New Status**—Select the status to which to change the work order.

---

**Function**

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reschedule work orders</td>
<td>Select the work order to reschedule in the Daily Schedule list, and then drag it to the day on the calendar for which to reschedule it. You must select either today’s date or a future date as the reschedule date on the calendar.</td>
</tr>
</tbody>
</table>

**Note:** To delete an existing work order schedule, select the work order schedule to delete in the Daily Schedule list, and then click **Delete Schedule**. You may not delete work order schedules that are set in the past.
Freezing and unfreezing activity schedules

Temporarily freeze a schedule to compare the actual work done against the work that you scheduled. Frozen activity schedules cannot be updated.

To freeze and unfreeze activity schedules:

1. Open the Work Order Scheduling form.
2. Right-click on the form, and then choose Freeze/Unfreeze.
3. Freeze/Unfreeze—Select Freeze to freeze the schedule or select Unfreeze to unfreeze the schedule.
4. From Date and To Date—Enter the starting and ending dates for the freeze period.
5. Department—Enter the department for which to freeze or unfreeze schedules.
6. Click Submit.

Balancing the workload

Balance the workload by adjusting the schedule. The WO Load Balancing form consists of three pages: the Parameters page, on which you define the selection criteria for locating the work orders to balance; the Preview page, on which you can preview the work orders prior to actually balancing them and select or unselect the work orders to process as necessary; and the Balance Load page, on which you can balance the work order load.

The Generate Options section of the Parameters page enables you to specify the manner in which the system processes the work orders.

The Preview page allows you to preview all of the work orders selected for processing based on the selection parameters, enabling you to select or unselect work orders to balance. You can select or unselect individual work orders for processing, or you can select or unselect all work orders for processing.

Note: The system does not enable you to balance the workload for work orders of Type ST (standing work order) or MEC (multiple equipment child).

The Balance Load page enables you to view labor availability and reschedule work.

To balance the workload:

1. Open the WO Load Balancing form.
2. Work Order Org.—Enter the organization to which the work order belongs if you use multi-organization security.
3. Enter selection criteria as necessary in the Selection Parameters section of the form.
Note: You can enter wildcards for the **Department, PM Schedule, Project Budget, WO Type, Priority, Trade, Status, Reported By, Work Order, Assigned To,** and **Assigned By** parameters. Enter the first character of the parameter followed by a percentage sign, and then click **Process.** For example, if you enter E% for **Trade,** the system retrieves all work orders with a trade that begin with the letter "E" on the **Preview** tab.

4 **Schedule Window (Days)**—Enter the number of days into the future for which to calculate labor availability.

5 **Sort By**—Select whether to sort by **Reported Date or by** Scheduled Start Date.

6 Click **Process.**

7 **Select**—Select each work order you wish to balance, or you can unselect each work order you do not wish to balance as necessary.

   **Note:** To select all the work orders at once, check **Select.** To unselect all the work orders at once, uncheck **Select.**

8 Click **Lock Selected Work Orders.**

9 Select a work order, and then click 🔄 to move the current work order ahead in time. Click 🔄 to move the current work order back in time. You may also click a specific date cell to change the work order date. In the lower section of the form, the system displays colors to represent labor availability versus labor required for the work order:

   - **Green**—Available labor hours exceed required labor hours
   - **Yellow**—Required labor hours equal available labor hours
   - **Red**—Required labor hours exceed available labor hours

   By adjusting work orders in the schedule, you can reschedule them at times when enough labor is available, and thus balance the workload.

10 Click **Update Activity** to update the work order activity.

11 **Activity-Trade**—Select the activity-trade for which to update the trade or start date.

12 **Trade**—Enter the trade to update for the activity.

13 **Start Date**—Enter the starting date to update for the activity.

14 Click **Save.**

15 Click **Close Session and Update Work Orders.**

   **Note:** To save the work order balancing session, click **Save Session.**

   To cancel the work order balancing session, click **Cancel Session.**

**Viewing work order details while balancing the workload**

View work order details while balancing the workload for a work order to access specific information about a work order that can affect the scheduling of the work order, such as the location, priority, start and due dates, etc.

To view work order details while balancing the workload:
1 Open the **WO Load Balancing** form.
2 Generate, preview, and lock the list of work orders to balance as necessary. See "Balancing the workload" on page 473.
3 Select the work order for which to view details, and then click **View WO Details**.
4 View the work order details for the work order to balance.
5 Click **Close**.

### Completing work

This section describes the process for completing work information. You may close work orders on the **Closing** page or on the **Work Order Quick Close** form. Depending on your particular system parameter configuration, you may or may not be able to complete transactions for the closed work order. Also, in certain cases, you may not be able to close work orders if there are still purchases outstanding. Reopen closed work orders if necessary.

### Closing work orders

Close completed work orders.

**Note:** If you close a PM work order, the system generates the next PM work order.

You may also close work orders on the **Work Order Quick Close** form. See "Closing work orders on the quick close form" on page 477.

You cannot close a work order if any of the following conditions is true:

- **If Prevent WO Completion** is selected for the **Equipment** on the work order header or any of the associated MEC work orders
- If the WOCLPOUT installation parameter is set to NO and the work order or one of the MEC work orders is referenced on an active purchase order or requisition line
- If the WOCLPOUT installation parameter is set to NO and the work order or one of the MEC work orders contains one or more direct purchase parts that have been received to a **Store** but not yet issued to the work order
- If the EVTCASCD installation parameter is set to NO and the work order is the parent of at least one open dependent child work order

**Note:** The setting of the EVTCASCD installation parameter does not affect the **Status** of a MEC work order when you change the Status of the parent multiple equipment order because the system always cascades the Status of the parent multiple equipment work order to the associated MEC work orders.

To close work orders:
1 Open the **Work Orders** form.
2 Select the work order to close, and then click the **Closing** tab.
The system automatically populates **Equipment**, the equipment description, and the **Downtime Cost** currency.

3 **Status**—Select Completed as the status of the work order.

**Note:** If you close a work order that is a template standard work order and that has children attached, the system recalculates and updates the status of all child work orders attached. If you close the last child work order in a sequence, the system recalculates the requested start and end dates for all child work orders.

Depending on your system configuration, you may not be able to close a parent work order until all dependent child work orders have been closed. Contact your system administrator for more information.

You can reopen a work order after it is closed if the REOPENPM installation parameter is set to YES and you have the proper status authorization to do so. However re-opening a parent work order does not affect any child work orders of the parent work order regardless of whether the child work order is dependent on the parent or the setting of the EVTCASCD installation parameter.

If the work order is a multiple equipment work order, then the system updates the **Status** of all MEC work orders associated with the work order to the **Status** of the parent work order.

4 **Equipment**—Enter the equipment on which the work was performed.

**Note:** If the equipment record was previously flagged as **Prevent WO Completion**, you will not be able to close the work order.

5 **StartDate**—Enter the date on which the work started.

6 **Date Completed**—Enter the date on which the work was completed.

**Note:** When closing a multiple equipment work order, the system copies the **Date Completed** to any open MEC work orders associated with the parent multiple equipment work order and overwrites the existing **Date Completed** on the MEC work orders. However, the system does not overwrite the **Date Completed** on any MEC work orders that were completed prior to closing parent multiple equipment work order.

7 **Downtime Cost**—Enter the cost of the downtime to the production process.

8 **Downtime Hours**—Enter the number of hours that the equipment was down.

9 **Problem Code**—Enter the code of the problem that required work.

10 **Failure Code**—Enter the reason that the equipment or component failed.

11 **Cause Code**—Enter the problem cause code, i.e., the root cause of the problem.

12 **ActionCode**—Enter the code of the action taken to correct the problem.

**Note:** If the work order is a multiple equipment work order and you modify the **Problem Code**, **Failure Code**, **Cause Code**, and/or **ActionCode**, the system cascades the change to the corresponding codes on any MEC work orders that are not completed, overwriting any existing values.

13 **Click Save Record**.

**Note:** **Click Add Comment** to enter closing comments.
Closing work orders on the quick close form

Quickly close completed work orders on the Work Order Quick Close form. When you enter a work order number, the system automatically enters a status of Completed and enters today’s date as the date completed so that you may quickly close the work order. However, you may also update any information about the work order and book additional hours for the work order activities on this form.

**Notes:** If you close a PM work order, the system generates the next PM work order as long as the PM work order is not a duplicate.

You may also close work orders on the Closing page. See "Closing work orders" on page 475.

To close work orders on the Work Order Quick Close form:

1. Open the Work Order Quick Close form.
2. **Work Order**—Enter the work order number of the work order you wish to close.
   - The system automatically populates the work order description, Organization, and New Status with a value of Completed.
3. **Equipment**—Enter the equipment on which the work was performed.
   - **Note:** If the work order is a multiple equipment work order, then Equipment (on the work order header) is protected.
4. **New Status**—Select Completed as the new status of the work order.
   - **Note:** If you close a work order that is a template standard work order and that has children attached, the system recalculates and updates the status of all child work orders attached. If you close the last child work order in a sequence, the system recalculates the requested start and end dates for all child work orders.
   - A parent work order cannot be closed until all dependent child work orders have been closed.
5. **Start Date**—Enter the date and time on which the work started.
6. **Date Completed**—Enter the date on which the work was completed.
7. **Downtime Cost**—Enter the cost of the downtime to the production process.
8. **Downtime Hours**—Enter the number of hours that the equipment was down.
9. **Problem Code**—Enter the code of the problem that required work.
10. **Failure Code**—Enter the reason that the equipment or component failed.
11. **Cause Code**—Enter problem cause code, i.e., the root cause of the problem.
12. **Action Code**—Enter the action taken to correct the problem.
13. **Closing Comments**—Enter closing comments about the work order.
14. **Activity-Trade**—Select the activity-trade performing the work for which to book labor hours.
   - **Note:** When you select an Activity-Trade, the system temporarily protects Work Order to prevent an accidental change during the process of booking hours. However, upon saving the booked hours or clicking Clear, the system enables Work Order and clears the Activity-Trade. However, if you manually clear Activity-Trade, Work Order remains protected.
If the selected Work Order is a multiple equipment work order, then the system enables Equipment in the details section of the form, and it is required. If you clear Activity-Trade for a multiple equipment work order, the system also clears the Equipment, Equipment Org., and Related Work Order.

15 Employee—Enter the personnel performing the work for which to book hours.
16 Date—Enter the date on which the work was performed.
17 Equipment—Choose one of the following options if the work order is a multiple equipment work order:
   • Enter All Equipment to evenly distribute the booked labor to each equipment record on the work order. Upon saving the transaction, the system creates the labor booking records and applies them to each related work order for each equipment and selected activity. The Rate applicable to the multiple equipment work order will also be applied to all MEC work orders.
     Note: The system automatically applies any remainder of the Hours Worked to the last equipment record added to the work order.
     If you select All Equipment for Equipment and at least one of the related work orders has Completed status (or equivalent user status), the system displays a message enabling you to select whether to distribute the labor hours against only open related work orders or against all equipment.
     Also, the system disregards the setting of the COMDAYS installation parameter when posting labor booking transactions if you select All Equipment.
   • Enter WO Header Equipment to apply the booked labor to the work order header only.
   • Enter a specific Equipment record to apply the booked labor to the selected Equipment and the corresponding Related Work Order. The system automatically populates Equipment Org. and Related Work Order from the selected Equipment record.
     See "Adding equipment to work orders to split work order costs" on page 398.

18 Type of Hours—Select the type of hours worked (e.g., hourly rate, overtime rate, corrective booking, etc.).
19 Hours—Enter the number of hours spent performing the work.
20 End Time—Enter the scheduled start time and end time of the work order activity.
21 Click Save Hours.
22 Repeat these steps as necessary to book any additional hours against the work order activity.
23 Click Save Record.

Updating closing details for work orders in a batch

View, add, and/or edit closing details for work orders in a batch.

To update closing details for work orders in a batch:

1 Open the Batch Work Order Updates form.
2 Click the Closing Details tab.
3 Include New Equipment on WO Equipment page—Select to include new equipment on the selected work order’s Equipment page.

4 Work Order—Enter the work orders to update.

5 Click Retrieve WO Data.

6 WO Status—Enter the status of the work order.

**Note:** Only users with status change authorization are allowed to change WO Status.

7 Equipment No.—Enter the equipment on the work order.

8 Start Date—Enter the date the work started.

9 Date Completed—Enter the date the work was completed.

10 Downtime Cost—Enter the cost encountered during the time the equipment was out of operation due to failure.

11 Downtime Hours—Enter the number of hours the equipment was out of operation due to failure.

12 Problem Code—Enter the type of problem that required work.

13 Failure Code—Enter the cause of the equipment failure.

14 Cause Code—Enter the cause of the problem.

15 Action Code—Enter the action taken to correct the problem.

16 Click Update Work Order. The system automatically populates any Error Message.

**Note:** Depending on your system configuration, the system displays a popup requiring an electronic signature when you click Update Work Order.

Click Clear Line to delete the information from the selected row.

Click Refresh Screen to return the screen to its original state.

---

Reopening closed work orders

Reopen closed work orders when changes to the work order are required or when requisitions or purchase orders related to the closed work order must be generated. Only users with proper authorization may reopen closed work orders. Depending on your system configuration, you may not be able to reopen closed work orders. Contact your system administrator for more information.

To reopen closed work orders:

1 Open the Work Orders form.

2 Select the work order to reopen, and then click the Closing tab.

3 Status—Select Released as the status of the work order.

4 Click Save Record.

**Note:** The system automatically selects Reopened when the work order is saved.
Performing revision control

Revision control tracks and controls the authorization of modifications to entities.

**Note**: Set the installation parameter PMRVCTRL to YES to activate Revision Control. Contact your system administrator for more information.

Defining revision control approval lists

Create a revision control approval list to assign approvers to be designated for an entity revision record.

To define revision control approval lists:

1. Open the **Approval Lists** form.
2. Click **New Record**.
   The system automatically populates **Organization**.
3. **Organization**—Enter the organization to which the approval list belongs if you use multi-organization security.
4. **Approval List**—Enter a name for the approval list, and then enter an approval list description in the adjacent field.
5. Click **Save Record**.

Defining approvers for revision control approval lists

Manage the list of approvers for an existing revision control approval list on the **Revision Control Approval Lists** form.

To define approvers for revision control approval lists:

1. Open the **Approval Lists** form.
2. Select the list for which to define an approver, and then click the **Approvers** tab.
3. Click **Add Approver**.
4. **Approver**—Enter the approver to add to the approval list.
   The system automatically populates the approver description.
5. **Sequence**—Enter an approval order for the approver.
6. **Responsibility**—Enter the designation of the approver assigned to the revision, e.g. Manager1, Supervisor1, Foreman1.
7. Click **Submit**.

**Note**: To remove an approver from the approvers list, select the approver to remove, and then click **Remove Approver**.
Approving revisions

View revision approval records for various entities (PMs, tasks, material lists, and routes) and approve revisions when necessary.

To approve revisions:

1 Open the Revision Control Approvals form.
2 Select the revision record to approve, and then click Approve.

Note: If the approval list contains multiple approvers, the system updates Approver and Date. Once the final approver approves the revision, the system removes the record from the List View page.

Rejecting revisions

To reject revisions:

1 Open the Revision Control Approvals form.
2 Select the revision record to reject, and then click Reject.
3 Reject Reason—Enter a reason for rejecting the revision.
4 Click OK.

Note: Once a revision is rejected, the system removes the record from the List View page.

Viewing approvers

Access the Approvers page of the Revision Control Approvals form to view approvers for the selected revision.

To view approvers:

1 Open the Revision Control Approvals form.
2 Select the revision for which to view approvers, and then click the Approvers tab.
3 View the list of approvers.

Note: To reject an approver for revision control, select the approver to reject, and then click Reject.

Approving parent PMs for revision control

View the list of PM and PM-related revisions to evaluate the change to the associated entity record in terms of the PM schedule.

To approve parent PMs for revision control:
1 Open the Revision Control Approvals form.
2 Select the revision record for which to approve parent PMs, and then click the Parent PMs tab.
3 Select the Parent PM record to approve, and then click Approve.

   **Note:** If you are the final approver in this process, the system assigns a status of Finished and removes the record from the Parent PMs page.
   To reject a parent PM for revision control, select the parent PM to reject, and then click Reject.

### Viewing revision control approval history

History records are updated when users approve or reject revisions on the Revision Control Approvals form. The records display the designated approver and date.

To view revision control approval history:
1 Open the Revision Control History form.
2 View the approval history.

### Setting up revision control for PM work orders

Designate which PM work order fields, link buttons, and right-click options the system will protect when PM revision control is enabled for the Work Orders form and all work order-related tabs. Right-click options that are not work order specific, e.g., Audit Trail are not available for revision control setup.

**Note:** Revision Control must be enabled. Set PMRVCTRL to YES to activate PM Revision Control capabilities. Otherwise the system will not update any changes made on the form. Comments, Documents, and Translations tabs are not revision control enabled.

To set up revision control for PM work orders:
1 Open the Revision Control Setup form.
2 Protected—Select to protect the field on the Work Orders form and all work order-related tabs.
3 Click Save Record.

   **Note:** If no boiler text exists for the field, e.g., work order description, the system displays the ID element for the field.

### Setting up revision control for hazards

Designate which hazard fields, and link buttons the system will protect when hazard revision is not Unfinished.

To set up revision control for hazards:
1. Open the **Revision Control Setup** form.
2. Click the **Hazards** tab.
3. **Protect**—Select to protect the field on the **Hazards** form and all hazard-related tabs.
4. Click **Save Record**.

### Setting up revision control for isolation points

Designate which isolation point fields, tabs, and link buttons the system will protect when isolation point revision is not **Unfinished**.

To set up revision control for isolation points:

1. Open the **Revision Control Setup** form.
2. Click the **Isolation Points** tab.
3. **Protect**—Select to protect the field on the **Isolation Points** form and all isolation point-related tabs.
4. Click **Save Record**.

### Setting up revision control for precautions

Designate which permit fields, tabs, and link buttons the system will protect when precautions revision is not **Unfinished**.

To set up revision control for precautions:

1. Open the **Revision Control Setup** form.
2. Click the **Precautions** tab.
3. **Protect**—Select to protect the field on the **Precautions** form and all precaution-related tabs.
4. Click **Save Record**.

### Setting up revision control for permits

Designate which permit fields, tabs, and link buttons the system will protect when isolation point revision is not **Unfinished**.

To set up revision control for permits:

1. Open the **Revision Control Setup** form.
2. Click the **Permits** tab.
3. **Protect**—Select to protect the field on the **Permits** form and all permit-related tabs.
4. Click **Save Record**.
Defining initial service request information

Define initial service request information before creating service requests.

Defining customer information

Define the customers to whom to charge the cost of maintenance work. Then, associate properties and create a list of callers for service requests.

Creating customers

To create customers:

1. Open the Customers form.
2. Click New Record.
3. Organization—Enter the organization to which the customer belongs if you use multi-organization security.
4. Customer Code—Enter a unique code identifying the customer, and then enter the name or a description of the customer in the adjacent field.
5. Language—Select the customer's language. The language selected will be the default language for the customer in the system.
6. Currency—Enter the currency for the customer.
7. Class—Enter the class of the customer.
8. Out of Service—Select to indicate that the customer is no longer used.
9. Status—Enter a status to categorize the customer by status.
10. Parent—Enter the parent company. Using the "Parent" attribute, you can indicate whether a customer is part of a larger organization.
11. Customer—Select to indicate that this customer purchases goods or services from you. Selecting Customer inserts the customer into the lookup from which you select customers on any other forms within the system. Unselect to indicate that the customer does not purchase goods or services from you.
12. Customer Account Code—Enter the customer's account code to apply to invoices, contracts, or rental contracts generated for this customer.
13. Customer Cost Center—Enter the customer's cost center to apply to invoices, contracts, or rental contracts generated for this customer.
14. Tax Code—Enter the supplier's tax code to indicate the tax that must be applied to invoices generated for this customer.
15. Enter the customer's Contact Name, Telephone, Fax Number, and E-mail Address.
16. Our Contact—Enter the customer's primary contact for your organization.
17. EDI Number—Enter the customer's electronic data interchange (EDI) number for processing electronic transaction information.
18 Click Save Record.

Associating properties with customers

Associate properties with customers to easily create service requests for customers. Properties are based on the property-building-floor/unit structure established on the Service Request page.

Note: You must define property structures before associating properties with customers. See "Defining property code-structure combinations for service requests" on page 486.

To associate properties with customers:

1. Open the Customers form.
2. Select the customer with which to associate a property, and then click the Properties tab.
3. Click Add Property.
4. Property—Enter the property to associate with the customer.
   Note: If you enter a Property only, the system assumes that lower-level values are implied. In this case, you cannot use the same property twice for the same customer.
5. Building—Enter the building of the property to associate with the customer.
6. Floor/Unit—Enter the floor or unit of the building and property to associate with the customer.
7. Click Submit.
   Note: To delete a property, select the property to delete, and then click Delete Property.

Creating callers for customers

Associate customers’ employee names with customer records to help identify callers for service requests.

To create callers for customers:

1. Open the Customers form.
2. Select the customer for which to create a caller, and then click the Callers tab.
3. Click Add Caller.
4. Org.—Enter the organization to which the customer caller belongs if you use multi-organization security.
5. Name—Enter the name of the caller.
6. ID—Enter the user ID that the customer can use to log in to the customer service request system.
7. Phone—Enter the primary phone number of the caller.
8. E-mail—Enter the primary e-mail address of the caller.
9. Fax—Enter the primary fax number of the caller.
10. Property—Enter the default property of the caller.
11. Building—Enter the default property building of the caller.
12. Floor/Unit—Enter the default building floor or unit of the caller.
13 Allow Service Request Creation—Select to indicate that the caller may create new service requests.
14 Click Submit.

Note: To delete a caller, select the caller to delete, and then click Delete Caller.

Viewing customer requests for work orders

To view customer requests for work orders:

1 Open the Work Orders form.
2 Select the work order for which to view customer requests, and then click the Customer Requests tab.
3 View the customer request for the work order. See "Entering customer requests" on page 807 and "Processing an action request" on page 811.

Defining property code-structure combinations for service requests

Define property code-structures for service requests that reflect actual property-building-floor/unit hierarchies.

When defining property code-structure combinations for service requests, you must first define a level one property before you can create lower levels. For example, you must insert a record for "Property A" before inserting a record for "Property A – Building 1."

To define property code-structure combinations for service requests:

1 Open the Properties form.
2 Click Add Property.
3 Property—Enter the name of the property.
4 Building—Enter the name of the building to associate with the property.
5 Floor/Unit—Enter the name of the floor or unit to associate with the building and property combination.
6 Click Submit.

Note: To delete a property, select the property to delete, and then click Delete Property.

Associating properties with employees

To associate properties with employees:

1 Open the Employees form.
2 Select the employee for whom to associate properties, and then click the Properties tab.
3 Click Add Property.
4 Property—Enter the property with which to associate the employee.
5 Click Submit.
   
   Note: To remove a property, select the property to remove, and then click Remove Property.

Managing property information

Enter property information that users can access when creating information requests as customers call in requesting additional information.

To manage property information:

1 Open the Property Information form.
2 Click Add Information.
3 Property—Select the property for which to add information.
4 Information Type—Select the category of information to add.
5 Information—Enter the relevant information.
6 Click Submit.
   
   Note: To delete property information, select the property information to delete, and then click Delete Information.

Creating service codes

Create service codes that identify work request problems to add to service requests. You can create a service code based on a standard work order and the system will populate a service description and priority.

To create service codes:

1 Open the Service Codes form.
2 Click New Record.
3 Organization—Enter the organization to which the service code belongs if you use multi-organization security.
4 Service Code—Enter a code identifying the service code, and then enter a description in the adjacent field.
5 Property—Enter the property with which to associate the service code.
6 System—Enter the system equipment with which to associate the service code.
7 Standard WO—Enter the standard work order with which to associate the service code.
8 Customer Selectable—Select to allow callers to choose this service code on a service request.
9 Billable—Select to indicate that this service code is billable on a service request. If selected, the system also marks the service request as Billable on the Closing tab of the Service Requests form.

10 Std. Response Time—Enter, in minutes, the standard response time of the service code to use as a benchmark for evaluating response times to service requests that reference this service code.

11 Estimated Cost—Enter the estimated cost of the service code.

12 Priority—Enter the priority level of the service code.

13 Click Save Record.

Creating service requests

Create service requests when tenants call in to request maintenance. Use the search bar to quickly locate information associated with the caller. If the caller record does not exist, you may quickly create a new caller record. If a caller record does exist, you may edit the caller’s information and then enter service request details.

To create service requests:

1 Open the Service Requests form.

2 Click New Record.
   The system automatically populates Date/Time Reported with the current date and time.

3 Organization—Enter the organization to which the service request belongs if you use multi-organization security.

4 Find Caller By—Select the desired search criteria.

5 Enter a value for that contains, and then click Search. The system searches for a caller record that matches the search criteria and returns one of the following results:

   • The system locates one matching caller record — The system automatically populates the Requestor Name, Requestor Phone, Requestor E-mail, Customer, Customer Type, Property, Building, and Floor/Unit.

   • The system does not locate an exact match to the search criteria but does locate several caller records that begin with the same criteria — The system displays the Callers popup. If you see the caller record you need in the list, select the caller record for which to create a service request, and then click OK. The system automatically populates the Requestor Name, Requestor Phone, Requestor E-mail, Customer, Customer Type, Property, Building, and Floor/Unit if available.

   • The system does not locate any caller records that match the search criteria — Create a new caller record.

6 Service Request—Enter a description of the service request in the adjacent field.


8 System—Enter the code identifying the system that needs repair.
9 **Priority**—Select the priority of the service request.

10 **Class**—Enter the class of the service request.
   The system automatically populates **Class Org.** with the organization of the selected **Class**.

11 **Status**—Select the status of the service request.

12 **Service Request Type**—Select the type of the service request.

13 **Requestor Name**—Enter the name of the person requesting service.

14 **Requestor Phone**—Enter the phone number of the person requesting service.

15 **Requestor E-mail**—Enter the e-mail address of the person requesting service.

16 **Reference Number**—Enter the reference number for the service.

17 **Contact Name**—Enter the contact name of the person at the site needing service.

18 **Contact Phone**—Enter the contact person’s phone number.

19 **Contact E-mail**—Enter the contact person’s e-mail address.

20 **Assigned To**—Enter the name of the person responsible for completing the work.

21 **Customer**—Enter the requestor’s customer name, e.g., the name of the company for whom the requestor works.

22 **Property**—Enter the name of the property needing service.

23 **Building**—Enter the name of the building needing service.

24 **Floor/Unit**—Enter the name of the floor/unit needing service.

25 **Area**—Enter the name of the area needing service.

26 **Comments**—Enter any additional comments about the service request.

27 **Click** **Save Record**. The system automatically populates **Created By** with the **User ID** of the person who created the service request and populates **Created On** with the date and time the service request was created.

**Note:** The system verifies whether the service request being created is a duplicate or repeated service request. If the service request is a duplicate or repeated service request, the system displays a message with a list of possible matches and asks whether to mark the new service request as a duplicate or a repeat. If you select to duplicate or repeat an existing service request, the system marks the service request as either a **Duplicate Parent** or **Repeated Parent**, respectively.

To view a list displaying all requests for the specified caller, right-click on the **Service Requests** form, and then choose **View Requests for Caller**.

To view a list displaying all requests for the specified customer, right-click on the **Service Requests** form, and then choose **View Requests for Customer**.

To create a work order for the service request, right-click on the **Service Requests** form, and then choose **Create WO**. Once you choose to create a work order, the system generates a work order for which you may assign one or multiple activities. The new work order number is the same as the service request number, but it also contains a prefix of "SR."

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**Creating new caller records**

Create a new caller record if you cannot locate a caller record via the **Find Caller By** search bar. See "Creating service requests" on page 488 for information on searching for callers.
To create new caller records:

1. Open the **Service Requests** form.
2. Click **New Record**.
3. Right-click on the form, and then choose **Add/Edit Caller**.
4. **Org.**—Enter the organization to which the customer caller belongs if you use multi-organization security.
5. **Customer**—Enter the caller’s customer name, e.g., the name of the company for whom the caller works.
6. **Name**—Enter the name of the caller.
7. **Phone**—Enter the primary phone number of the caller.
8. **E-mail**—Enter the primary e-mail address of the caller.
9. **Fax**—Enter the primary fax number of the caller.
10. **Allow Service Request Creation**—Select to indicate that the caller may create new service requests.
11. **Property**—Enter the default property of the caller.
12. **Building**—Enter the default property building of the caller.
13. **Floor/Unit**—Enter the default building floor or unit of the caller.
14. **ID**—Enter the user ID that the customer can use to log in to the customer service request system.
15. Click **Save as New**.

**Note:** Click **Cancel** to close the Create/Edit Caller popup without saving changes. Click **Reset** to clear all data on the Create/Edit Caller popup.

**Editing existing caller records**

Edit existing caller records on the Add/Edit Caller popup. Then you may save the changes to the selected caller’s record or as a new record.

**Note:** Editing an existing caller record permanently updates the caller’s information in the system. If you only want to specify a different contact person for a specific service request, simply enter the contact’s information on the **Service Request** form.

To edit existing caller records:

1. Open the **Service Requests** form.
2. Click **New Record**.
3. Search for a caller by using the Find Caller By search bar.
4. Right-click on the form, and then choose **Add/Edit Caller**.
5. Choose one of the following options:
   - **Edit existing caller details and save the changes as a new caller record**—Modify the information as necessary, and then click **Save as New**. The system saves the changes in a new caller record.
• **Edit existing caller details and save the changes to this caller record**—Modify the information as necessary, and then click **Save Changes**. The system permanently saves the changes to the caller record.

**Note:** If an **ID** is listed on the existing record, you must change the **ID** before clicking **Save as New**. Click **Cancel** to close the Add/Edit Caller popup without saving changes. Click **Reset** to clear all data on the Add/Edit Caller popup.

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**Assigning personnel to service requests**

Assign personnel to complete work required for a particular service request. Once you choose to assign personnel, the system generates a work order for which you may assign one or multiple activities. The new work order number is the same as the service request number, but it also contains a prefix of "SR."

To assign personnel to service requests:

1. Open the **Service Requests** form.
2. Select the service request for which to assign personnel, and then click the **Record View** tab.
3. Right-click on the form, and then choose **Assign Personnel**.
   **Note:** **Trade Filter** defaults to the trade of the selected work order activity.

4. **Activity-Trade**—Select the activity-trade to which to assign personnel. The system changes the value of **Trade Filter** to the trade of the selected activity and populates the People Available list with all personnel assigned to the trade.
   **Note:** Select ALL TRADES from **Trade Filter** to display all available personnel associated with the property.
   Select ALL PEOPLE from **Trade Filter** to display all available personnel.

5. **Trade Filter**—Select the name of the person to whom to assign the work in the People Available list, and then click >. The system assigns the person to the highlighted work order activity, removes their name from the People Available list, and displays their name in the People Assigned list. Repeat this process to add as many people to the activity as necessary.
   **Note:** To clear a person from the People Assigned list, select the name and then click <. The system moves their name from the People Assigned list to the People Available list.

6. Repeat steps 4 and 5 to select additional activities and assign personnel as necessary.
7. Click **Submit**.
   **Note:** Click **Cancel** to close the Assign Personnel to Service Request popup. Clicking **Cancel** does not cancel the personnel assignments already submitted on the popup.
Viewing work order details

To view work order details:

1. Open the Service Requests form.
2. Select the service request for which to view work order details, and then click the Work Order Details tab.
3. View the work order details.

Closing service requests

To close a service request, the service request to close must be open and associated with an open work order to which personnel is assigned. Closing a service request will also close the work order to which it is associated. Additionally, you must have sufficient system privileges to close both the service request and work order. You may close service requests on the Closing page of the Service Requests form, or you may book employee time for service requests and close service requests concurrently on the Book & Close page of the Service Requests form. See "Booking hours and closing service requests" on page 495 for information on the Book & Close page.

To close service requests:

1. Open the Service Requests form.
2. Select the service request to close, and then click the Closing tab.
3. Equipment—Modify the equipment on which the work was performed as necessary.
   Note: A service request cannot be closed if the Equipment associated with it does not permit closure.
4. Status—Select Closed.
5. Billable—Select whether the service request is billable.
6. Click Save Record.
   Note: Click Add Comment to enter completion comments as necessary. See "Entering comments" on page 60.

Booking hours for service requests

Book hours for service requests to track the number of hours spent performing work associated with the service request.

Note: All hours booked for a service request are recorded on the work order associated with the service request.

To book hours for service requests:

1. Open the Service Requests form.
2 Select the request for which to book hours, and then click the **Book Hours** tab.

3 Click **Add Labor**.

4 **Person**—Enter the person performing the work for the service request.

5 **Department**—Enter the department where the work for the service request was performed.

6 **Trade**—Enter the trade that performed the work.

7 **Date Worked**—Enter the date on which the work was performed for the service request.

8 **Type of Hours**—Select the type of hours worked (e.g., normal rate, overtime rate, etc.).

9 **Hours Worked**—Enter the number of hours spent performing the work for the service request.

   **Note:** To quickly enter information when booking hours for a service request, click the row containing the personnel assignment for which to book hours. The system automatically populates the **Person**, **Date Worked**, and **Activity-Trade**. Modify the information as necessary.

10 **Activity-Trade**—Select the activity-trade performing the work for the service request.

11 **Rate**—Enter or modify the hourly pay rate for the employee or trade performing the work. If you defined a trade rate for the select employee or trade, the system automatically populates **Rate** with the appropriate hourly rate.

   If you defined a trade rate for the selected **Employee**, the system populates **Rate** with the employee trade rate. However, if you did not define trade rates for the selected **Employee**, the system populates **Rate** with the trade rate defined for the selected **Trade**.

12 Click **Submit**.

13 Repeat these steps as necessary to book any additional hours against the work order activity for the service request.

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### Issuing parts for service requests

Issue parts against service requests to record the parts that were used when performing the work associated with the service request.

**Note:** You may only issue parts to service requests for which a work order has been created.

To issue parts for service requests:

1 Open the **Service Requests** form.

2 Select the request for which to issue parts, and then click the **Issue Parts** tab. The system automatically selects Issue as the **Transaction Type** and populates **Date** with the current system date and time.

3 Click **Add Part**.

4 **Part**—Enter the part to issue to the service request. The system automatically populates the part description, **UOM**, and **Part Org**. The system selects **Track By Asset** and/or **Track By Lot** if the part is tracked by asset and/or lot and they are protected.

   **Note:** If you are updating a part to issue on the service request and you select a part from the Parts list, the system displays the quantity of the part planned to be used for the service request in **Planned Qty**. and the quantity of the part used to date for the service request in **Used**.
5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

6 **Activity-Trade**—Enter the activity-trade performing the work for the selected service request.

7 **Store**—Enter the store from which to issue parts. The system automatically populates **Available** with the quantity of the part available in the selected store for the work order activity after you have entered **Part**, **Activity-Trade**, and **Store**.

8 **Transaction Type**—Select **Issue**. **Tool Hours** is protected because the **Transaction Type** is **Issue**.

9 **Date**—Enter the desired date of the transaction.

10 **Quantity**—Enter the number of parts to issue to the work order. The number must be greater than zero.

    **Note:** If the part is tracked by asset, the **Quantity** must be equal to 1.

11 **Failed Qty.**—Enter the quantity of the part that failed.

    **Note:** The system does not allow part failures on an Issue for parts tracked by asset or core tracked.

12 **Date Failed**—Enter the date the part failed.

13 **Problem Code**—Enter the code of the problem that required work.

14 **Failure Code**—Enter the reason that the part failed.

15 **ActionCode**—Enter the action taken to correct the problem.

16 **Cause Code**—Enter the problem cause code, i.e., the root cause of the problem.

17 **Failure Notes**—Enter comments about the failure.

18 **Asset ID**—Enter the asset ID if the part is tracked by asset.

19 **Bin**—Enter the bin from which to issue the parts.

20 **Lot**—Enter the lot from which to issue the parts.

21 Click **Submit**.

    **Note:** To record a stockout for a part, select the part, and then click **Record Stockouts**. See "Recording stockouts for parts" on page 217.

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**Returning parts from service requests**

Return unused parts issued to service requests back to stores.

To return parts from service requests:

1 Open the **Service Requests** form.

2 Select the request for which to return parts, and then click the **Issue Parts** tab. The system automatically populates **Date** with the current system date and time.

3 Click **Add Part**.
4 **Part**—Enter the part to return. The system populates the part description, **UOM**, and **Part Org**. The system automatically populates the part description, **UOM**, and **Part Org**. The system selects **Track By Asset** and/or **Track By Lot** if the part is tracked by asset and/or lot and they are protected.

**Note:** If you are updating a part to return on the service request and you select a part from the Parts list, the system displays the quantity of the part planned to be used for the service request in **Planned Qty.** and the quantity of the part used to date for the service request in **Used**.

5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**. When returning a condition tracked part, the condition in which the part is being returned must be entered in the return condition field.

6 **Activity-Trade**—Enter the activity-trade performing the work for the selected service request. The system automatically populates **Available** with the quantity of the part available in the selected store for the work order activity.

7 **Store**—Enter the store to which to return parts.

8 **Transaction Type**—Select **Return**.

**Note:** If you select **Return** as the Transaction Type for a core tracked part, the system automatically enables **Core Return**. You can select **Core Return** to indicate that the part needs repair. If **Core Return** is selected, the system adds the quantity of the part to return to the **Core Qty.** in the store to which the part is returned.

If RTNANY is set to NO, you can only return the quantity of the part that was originally issued to that entity to the same store. 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. Regardless of the setting of the RTNANY installation parameter, you cannot return a greater quantity of a part tracked by lot than the quantity of the part that has been used to date for the work order.

9 **Date**—Enter the desired date of the transaction.

10 **Quantity**—Enter the number of parts to return to the work order. The number must be greater than 0 (zero).

**Note:** If the part is tracked by asset, the **Quantity** must be equal to 1.

11 **Asset ID**—Enter the asset ID if the part is tracked by asset.

12 **Bin**—Enter the bin to which to return the parts.

13 **Lot**—Enter the lot to which to return the parts.

14 **Tool Hours**—If the part you are returning is identified as a tool, enter the number of hours the tool was in use.

15 Click **Submit**.

**Booking hours and closing service requests**

Book employee time for service requests and close service requests concurrently on the Book & Close page of the **Service Requests** form. To close a service request, the service request to close must be
open and associated with an open work order to which personnel is assigned. Closing a service request also closes the work order to which it is associated. You must have sufficient system privileges to close both the service request and work order.

**Note:** All hours booked for a service request are recorded on the work order associated with the service request.

To book hours and close service requests:

1. Open the **Service Requests** form.
2. Select the service request for which to book hours and close, and then click the **Book & Close** tab.
3. **Equipment**—Modify the equipment on which the work was performed as necessary.
   
   **Note:** A service request cannot be closed if the **Equipment** associated with it does not permit closure.

4. **Status**—Select **Closed**.
5. **Billable**—Select whether the service request is billable.
6. **Comments**—Enter completion comments as necessary.
7. Click **Add Labor**.
8. **Activity-Trade**—Select the activity-trade performing the work for the service request.
9. **Person**—Enter the person performing the work for the service request.
10. **Date Worked**—Enter the date on which the work was performed for the service request.
11. **Hours Worked**—Enter the number of hours spent performing the work for the service request.
12. Click **Submit**.
13. Repeat these steps as necessary to book any additional hours against the work order activity for the service request.
14. Click **Save Record**.

### Creating service request log entries

Log entries detail changes that have been made to the service request since its creation. View a service request’s log entries and then create additional log entries as necessary.

To create service request log entries:

1. Open the **Service Requests** form.
2. Select the request for which to create a log, and then click the **Log Entries** tab.
3. Click **Add Log Entry**.
4. **Type**—Select the type of log entry you are adding.

   **Note:** If you select Time Correction for **Type**, the system makes **Time Correction** available as a required field. Enter the number of minutes to add or subtract from the response time. For example, to add 35 minutes to the response time, enter 35. To subtract 2 hours from the response time, enter −120. Click **Submit**. The system corrects the response time.
5 Comment—Enter log entry comments as necessary.
6 Click Submit.
   The system automatically populates Old Status, New Status, Entered By, and Date/Time Entered.

Creating information requests

Create information requests whenever customers call in requesting additional information.

To create information requests:

1 Open the Information Requests form.
2 Click New Record.
   The system automatically populates Date/Time Reported with the current date and time.
3 Organization—Enter the organization to which the service request belongs if you use multi-organization security.
4 Find Caller By—Select the desired search criteria.
5 Enter a value for that contains, and then click Search. The system searches for a caller record that matches the search criteria and returns one of the following results:
   • The system locates one matching caller record—The system automatically populates the Requestor Name, Requestor Phone, Requestor E-mail, Customer, Customer Type, and Property.
   • The system does not locate an exact match to the search criteria but does locate several caller records that begin with the same criteria—The system displays the Callers popup. If you see the caller record you need in the list, select the caller record for which to create an information request, and then click OK. The system automatically populates the Requestor Name, Requestor Phone, Requestor E-mail, Customer, Customer Type, and Property if available.
   • The system does not locate any caller records that match the search criteria—Create a new caller record.
6 Information Request—Enter a description of the information request in the adjacent field.
7 Customer—Enter the name of the customer store requesting information.
8 Property—Enter the property for which to view information.
9 Information Type—Select the category of information to view. The system displays the information in Specific Information.
10 Requestor Name—Enter the name of the person requesting service.
11 Requestor Phone—Enter the phone number of the person requesting service.
12 Requestor E-mail—Enter the e-mail address of the person requesting service.
13 Click Save Record.
Creating PM plans

Create and update PM plans to create PM schedules or add equipment to multiple PM schedules at once. A PM schedule is a predefined set of preventive maintenance details to be performed on a defined interval for equipment. PM plans enable you to quickly enter and update groups of PM schedules.

For example, you have three different PM schedules for car repairs that include: one for tire rotation, one for oil change, and another for brake adjustments. Create a PM plan and add the three car repair PM schedules to it. You then add 30 cars as equipment on the PM plan, which are then added to the three PM schedules in one click via the PM plan. PM plans and PM schedules are related to one another only by the list of equipment they share.

**Note:** You can view PM plans and schedules created on the **PM Plans** form on the **PM Schedules** form.

The PM plan functionality is not available when the PMRVCTRL installation parameter is set to **Yes**.

Creating PM plan headers

To create PM plan headers:

1. Open the **PM Plans** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the PM plan belongs if you use multi-organization security.
   
   **Note:** If multi-organization security is activated, i.e., the MULTIORG installation parameter is set to YES, you can only attach PMs of the same organization to a PM plan. A PM plan and all PM schedules attached to the plan must share the same **Organization**.

4. **PM Plan**—Enter a unique code identifying the PM plan, and then enter a description in the adjacent field.
5. **Class**—Enter the class of the PM plan. The classes shown belong to the PM Plan entity. The system automatically populates **Class Org**.
6. **Equipment Class**—Enter the class of the equipment. If you select an equipment class, the system restricts attaching PM equipment associated with other classes to the PM plan. The system automatically populates **Equipment Class Org**.
7. Click **Save Record**.

Copying PM plans

Copy PM plans to quickly create a new PM plan by copying information from an existing PM plan to a new plan.

To copy PM plans:
1 Open the PM Plans form.
2 Select the PM plan to copy, and then click the Record View tab.
3 Right-click on the form, and then select Copy PM Plan.
4 New PM Plan—Enter a unique code identifying the new PM plan, and then enter a description of the PM plan in the adjacent field.
5 Custom Field Values, Comments, Activities, PM Schedules, Equipment, and Documents—Select which related details to copy to the new PM plan.
6 Click Submit.

Associating PM schedules with PM plans

Associate PM schedules with PM plans to manage equipment for all of the PM schedules on the PM plan.

To associate PM schedules with PM plans:

1 Open the PM Plans form.
2 Select the PM plan with which to associate PM schedules, and then click the PM Schedules tab. The system automatically populates Organization with the organization of the logged in user.
3 Choose one of the following options:
   • Associate an existing PM schedule—Enter an existing PM Schedule. The system automatically populates the PM Schedule description. The system also populates the WO Type, Duration, PM Type, Class, Priority, WorkPackage, and PerformEvery from the existing PM schedule.
     Note: You cannot add an existing PM schedule with equipment to a PM plan.
     If you select an existing PM schedule, the system only populates PM Plan on the existing PM schedule record. If you update any of the existing PM schedule data from the PM schedule on the PM plan, the system also displays the changes to the PM schedule record.
     If there are existing activities on the PM schedule, the system also copies the activities to the PM plan.
   • Create and associate a new PM—Click Add PM Schedule. Enter a unique code identifying the new PM Schedule, and then enter a description in the adjacent field.
4 WO Type—Select the work order type for the PM schedule.
5 Duration—Enter the estimated number of days to complete the PM.
6 PM Type—Select the type of PM.
7 Class—Enter the class of the PM. The classes shown belong to the PPM entity.
8 Priority—Select the priority level of the PM.
9 Work Package—Select to indicate that this PM schedule can be associated with a work package.
10 Perform Every—Enter the length of the interval of time to pass before the system generates the next PM work order. You can enter any value between 0 and 99999, and then select the unit of measure in the adjacent field. The unit of measure for the PM period can be days, weeks, months, quarters, or years.
11 Perform On—Enter the week of the month and the day of the week on which to perform the work on the equipment, e.g., 2 and Tuesday of the month due. Select Last to handle scenarios in which there are five weeks in a month. The system sets the due date to the last week of the month.

12 Click Submit.

Note: To delete a PM schedule, select the PM schedule record to delete, and then click Remove PM Schedule.

If the PM schedule to delete has equipment, the system displays a message enabling you to indicate whether to remove all of the equipment from the PM schedule.

If you click No, the system does not remove the equipment from the PM schedule but deletes the PM schedule from the PM plan, clears the PM plan activities for the PM schedule, clears the PM plan on the PM schedule record, and deletes all work orders for the PM schedule with a status of Awaiting Release.

If you click Yes, the system removes the equipment from the PM schedule. If Work Package is not selected, the system removes the PM schedule from the PM plan, clears the PM plan activities for the PM schedule, clears the PM plan on the PM schedule record, and deletes all work orders for the PM schedule if all of the PM work orders have a status of Complete or Awaiting Release. If any of the PM work orders for the PM schedule have a status other than Complete or Awaiting Release, the system populates Date Deactivated for the equipment on the Equipment page of the PM Schedules form instead of removing the equipment from the PM. If the PM plan has only one PM schedule, the system removes the equipment from the PM plan.

If Work Package is selected, the system also removes the equipment from the work package associated with the PM schedule.

Creating activities for PM schedules on PM plans

Create activities for PM schedules on PM plans to conveniently add activities for PM schedules. The Activities page of the PM Plans form functions in the same manner as the Activities page of the PM Schedules form. See "Defining activities of PM work orders" on page 446.

The functionality of the Activities page of the PM Plans form is unlike the functionality of the Equipment page of the PM Plans form because additions/revisions made on the Activities page affect only the selected PM schedule and do not affect/update all of the PM schedules on the PM plan. See "Adding equipment to PM plans" on page 502.

To create activities for PM schedules on PM plans:

1 Open the PM Plans form.
2 Select the PM plan for which to create activities, and then click the Activities tab.
3 Click Add PM Activity.

Note: To update an existing activity or PM schedule, select the activity to update. The system populates PM Schedule, Activity, Trade, Task, Material List, Estimated Hours, People Required, Start, and Duration from the selected activity record.
4 **PM Schedule**—Enter the PM schedule. The system automatically populates **Activity** with the next consecutive number according to the INCRLINO installation parameter and populates **People Required**, **Start**, and **Duration** with "1".

5 **Trade**—Enter the trade required to perform the activity.

6 **Task**—Enter the task code for the activity.

7 **Material List**—Enter the code identifying the material list that contains the parts needed for the activity.

8 **Estimated Hours**—Enter the estimated number of hours required to complete the activity.

9 **People Required**—Modify the number of people required to perform the activity as necessary. When you enter a **Trade** and **Estimated Hours**, the system populates **People Required** based on the following equation:

   \[
   \text{People Required} = \left( \frac{\text{Estimated Hours}}{\text{Duration}} \times \text{the value of the WORKDAY installation parameter} \right)
   \]

10 **Start**—Enter 1 if the activity is to start on the same day that the standard work order starts. Enter 2 if the activity should start on day 2 of the standard work order, etc.

11 **Duration**—Enter the estimated number of days to complete the PM.

12 Click **Submit**.

   **Note**: To delete an activity from the PM plan, select the activity to delete, and then click **Delete PM Activity**.

   To copy the activity, select the activity to copy, and then click **Copy PM Activity**. The system inserts a new PM Activity Details record and populates **Trade**, **Task**, **Material List**, **Estimated Hours**, **People Required**, **Start**, and **Duration** from the selected activity. Enter a **PM Schedule**, and then click **Submit**.

---

**Moving activities to PM plans**

Move activities from one PM to another or change the sequence of an activity within the same PM.

To move activities to PM plans:

1 Open the **PM Plans** form.
2 Select the PM plan for which to move activities, and then click the **Activities** tab.
3 Select the activity to move, and then click **Move PM Activity**.
4 **New PM Schedule**—Enter the PM Schedule to which to move the activity. The system automatically populates the **New PM Schedule** description and **New Activity** with the next available activity number.

   **Note**: If the activity being moved has tools associated with it, the system also moves the tools to the new PM activity.

   You can also renumber activities on the same PM by entering the same PM number for **New PM Schedule** and entering a **New Activity** number.
5 Click **Save**. The system moves the activity and updates the PM schedule records on both the **PM Plans** and **PM Schedules** forms.

### Adding equipment to PM plans

Add equipment for PM schedules to PM plans. Equipment added to a PM plan is automatically associated with every PM schedule on the PM plan.

**Note:** You can only add or delete equipment for a PM schedule on a PM plan on the **Equipment** page of the **PM Plans** form.

If **Work Package** is selected for a PM schedule on the PM plan, the system does not create an initial PM work order for the PM schedule when equipment is added to the PM plan.

To add equipment to PM plans:

1. Open the **PM Plans** form.
2. Select the PM plan to which to add equipment, and then click the **Equipment** tab. The system automatically populates **Work Order Org.** with the organization of work order.
3. **Equipment**—Enter the PM equipment to add to the PM plan.
   **Note:** Because the equipment details information for the PM plan is stored in the same database table with the equipment information for PM schedules, all of the additional equipment data that is available on the **Equipment** page of the **PM Schedules** form is also copied to this tab, although the system does not display the data. Likewise, all location information and handling of dormant periods/bypassing is also carried over from the PM schedule. If necessary, you can update the equipment details on the **Equipment** page of the **PM Schedules** form. See "Creating preventive maintenance work orders" on page 441.
4. Click **Submit**. The system updates the Equipment list and populates **PM Plan** on the **Equipment** page of the **PM Schedules** form. Add additional equipment to the PM plan as necessary.
   **Note:** To remove equipment, select the equipment to remove, and then click **Remove Equipment**. If **Work Package** is selected for the PM schedule(s) on the PM plan and there are work orders with a status of Completed or Awaiting Execution, the system deletes the PM work orders with Awaiting Execution status, makes no changes to completed work orders, deletes the equipment from all of the associated PM schedules, and detaches the PM schedule(s) from the work package. If any of the PM work orders for the PM schedule have a status other than Complete or Awaiting Release, the system populates **Date Deactivated** for the equipment on the **Equipment** page of the **PM Schedules** form instead of removing the equipment from the PM.
Managing fuel

Manage fuel by tracking fuel issues and receipts. Associate fuel types to depots, tanks, and pumps. View fuel transactions.

Creating fuels

Enter the different types of fuel and fuel mixes to issue to vehicles or equipment.

To create fuel:

1. Open the **Fuels** form.
2. Click **New Record**.
3. **Fuel**—Enter a unique code identifying the fuel.
4. **Fuel Description**—Enter a description of the fuel.
5. **Fuel Type**—Select the fuel type.
6. **UOM**—Enter the unit of measure in which to measure the fuel quantities.
7. **Class**—Enter the class to which the fuel will belong.
   The system automatically populates **Class Org**.
8. **Emissions Commodity**—Enter the commodity to associate with the fuel to track CO2e emissions.
9. **Blended Grade**—Select if this fuel is a blend of two or more grades.
   **Note:** If you selected **Blended Grade**, complete steps 13-22.
10. **Out of Service**—Select to indicate the fuel is no longer in service. If you select **Out of Service** the system retains the fuel record, but it will no longer appear in the lookups for fuels on other forms.
11. **Fuel 1**—Enter fuel type 1.
12. **Blend % 1**—Enter the percentage of blended grade 1.
13. **Fuel 2**—Enter fuel type 2.
14. **Blend % 2**—Enter the percentage of blended grade 2.
15. **Fuel 3**—Enter fuel type 3.
16. **Blend % 3**—Enter the percentage of blended grade 3.
17. **Fuel 4**—Enter fuel type 4.
18. **Blend % 4**—Enter the percentage of blended grade 4.
19. **Fuel 5**—Enter fuel type 5.
20. **Blend % 5**—Enter the percentage of blended grade 5.
21. Click **Save Record**.

Creating depots

Create depots to specify storage areas for fuel.
To create depots:

1. Open the **Depots** form.
2. Click **New Record**.
3. **Depot**—Enter a unique code identifying the depot.
4. **Description**—Enter a description of the depot.
5. **Depot Organization**—Enter the organization to which the depot belongs.
6. **Class**—Enter the class to which the depot belongs. The system automatically populates **Class Org**.
7. **Location**—Enter the location of the depot. The system automatically populates **Location Org**.
8. Choose one of the following options:
   - **Markup %**—Enter a markup percentage, to be added to the average price when fuel is issued.
   - **Fixed Markup**—Enter a fixed markup amount, to be added to the average price when fuel is issued.
   - **External**—Select to indicate that the depot is an external depot.
   - **Out of Service**—Select to indicate that the depot is out of service.
   - **Allow Tank Volumes Greater than Capacity**—Select to allow a tank record to indicate a greater volume than set capacity.
   - **Allow Negative Tank Volumes**—Select to allow a tank record with a negative volume.
9. Click **Save Record**.

### Creating tanks for depots

Create tanks in which to store fuel at a specified depot.

To create tanks for depots:

1. Open the **Depots** form.
2. Select the depot for which to create a tank, and then click the **Tanks** tab.
3. **Tank**—Enter a unique code identifying the tank, and then enter a description of the tank in the adjacent field.
4. **Fuel**—Enter the fuel to store in the tank at the depot. The system automatically populates **Fuel Type**, **Volume UOM**, and **Average Price**.
5. **Max. Tank Volume**—Enter the maximum allowable fuel volume. The system automatically populates **Current Tank Volume**.
6. **Out of Service**—Select if the fuel is out of service.
7. Click **Submit**.

### Creating pumps for depots

Create pumps from which to issue fuel.
To create pumps for depots:

1. Open the Depots form.
2. Select the depot for which to add pumps, and then click the Pumps tab.
3. Click Add Pump.
4. Pump—Enter a unique code identifying the pump, and then enter a description of the pump in the adjacent field.
5. Out of Service—Select if the pump is out of service.
6. Click Submit.

Associating pumps to tanks and fuel for depots

Associate pumps with the tanks and fuel the pump will issue.

To associate pumps to tanks and fuel for depots:

1. Open the Depots form.
2. Select the depot for which to associate pumps to tanks, and then click the Tank/Pump tab.
3. Click Add Record.
4. Tank—Enter the tank to associate to the pump for the selected depot. The system automatically populates the tank description and Fuel.
5. Pump—Enter the pump to associate to the tank for the selected depot. The system automatically populates the pump description.
6. Active—Select to designate the pump as active on the selected tank.
7. Click Submit.

Note: To delete a tank/pump association, select the tank/pump combination for which to delete the association, and then click Delete Record.

Issuing fuel

Issue fuel to vehicles or equipment, and then track the quantity and price of fuel issued.

To issue fuel:

1. Open the Fuel Issues form.
2. Depot—Enter the depot at which the fuel is located. The system automatically populates the description of the depot, and Organization.
3. Date—Enter the date of the fuel issue.
   
   Note: If you are entering multiple transactions for one date, entering Date above will automatically populate Date below.
4. Click Add Fuel.
5 **Fuel**—Enter the fuel to be issued to the vehicle or equipment. The system automatically populates the fuel description, **Fuel Type**, **Fuel UOM**, and **Blend**.

6 **Pump**—Enter the pump from which the fuel was issued. The system automatically populates the pump description.

7 **Vehicle**—Enter the vehicle to which the fuel was issued. The system automatically populates the equipment description and **Vehicle Org**.

8 **Qty. Issued**—Enter the quantity in gallons of fuel issued. The system automatically populated **Price**.

9 **Date**—Enter the date of the fuel issue transaction.

10 Click **Add to List**.

11 Click **Submit Transaction**.

---

**Receiving fuel into tanks**

Receive fuel into tanks from selected depots.

To receive fuel into tanks:

1 Open the **Fuel Receipts** form.

2 **Depot**—Enter the depot from which to issue the fuel. The system automatically populates the depot description and **Organization**.

3 **Date**—Enter the date and time for which the fuel issue will occur.

4 Click **Add Tank**.

5 **Tank**—Enter the tank to receive the fuel issue. The system automatically populates the tank description, **Fuel**, fuel description, fuel UOM, and **Fuel Type**.

6 **Qty. Received**—Enter the fuel quantity to receive to the tank. The system automatically populates the quantity received unit of measure.

7 **Date**—Enter the date and time for which the fuel issue will occur.

8 **Price**—Enter the price for the fuel issue.

9 **Supplier**—Enter the fuel supplier.

10 Click **Add to List**.

11 Click **Submit Transaction**.

---

**Recording tank volumes for fuel physical inventories**

Record actual quantities of tanks on a fuel physical inventory record.

To record tank volumes for fuel physical inventories:

1 Open the **Fuel Physical Inventory** form.
2 Select or create the fuel physical inventory for which to record tank volumes, and then click the Tanks tab. The system automatically populates Line, Tank, Description, Fuel, Expected Volume, Expected Volume UOM, and Physical Volume UOM.

3 Physical Volume—Enter the actual volume of the tank for the selected fuel physical inventory record.

4 Click Submit.

Viewing associated depots and tanks for fuels

View a list of associated tanks and depots for selected fuels.

To view associated depots and tanks for fuels:

1 Open the Fuels form.
2 Select the fuel for which to view associated depots and tanks, and then click the Depot/Tank tab.
3 View the list of associated depots and tanks for the selected fuel.

Viewing fuel transactions

View the history of issues and receipts associated with fuels.

To view fuel transactions:

1 Open the Fuels form.
2 Select the fuel for which to view fuel transactions, and then click the Transactions tab.
3 View the transaction history for the selected fuel.

Understanding deferred maintenance

Deferred maintenance is a work order activity for a specific piece of equipment that will be performed at a future date. For example, a work order for vehicle maintenance might include several critical and non-critical activities. To save time, a supervisor might decide to defer one or more non-critical activities to a later date.

Create deferred maintenance from an existing work order or manually create deferred maintenance on the Deferred Maintenance form.
Creating deferred maintenance

Create deferred maintenance when a maintenance activity you want to defer has not been added to a work order. The deferred maintenance can be assigned to a work order when there is adequate availability on the equipment for the deferred activity to be completed.

To create deferred maintenance:

1 Click New Record.
   The system automatically populates Deferred Maintenance No., Status, Deferred By, People Required, Duration (Days) and Task Qty.

2 Organization—Enter the organization to which the work order belongs if you use multi-organization security.

3 Activity Note—Enter a description of the maintenance activity to defer.

4 Equipment—Enter the equipment for which to defer maintenance.
   The system automatically populates the adjacent field with the equipment's description, Equipment Type, and Equipment Org.

5 Status—Choose one of the following options:
   • Unassigned—Select to create the deferred maintenance.
   • Assigned—Select to assign the deferred maintenance to a specific work order.
   • Cancelled—Select to cancel the deferred maintenance.

Enter the following Deferred Maintenance details for steps 7-23:

6 Task—Enter the task code for the deferred maintenance.
   The system automatically populates Task Revision, UOM (field adjacent to Task Qty.) and Trade for the task, as well as People Required, Reason for Repair, Work Accomplished, Technician Part Failure, Manufacturer, System Level, Assembly Level, and Component Level if you use the American Trucking Association's Vehicle Maintenance Reporting System (VMRS).

7 Task Qty.—Enter the required number of units of the task to associate with the deferred maintenance, and then select the unit of measure for the Task Qty. in the adjacent field. For example, a work order activity to pave 100 miles of highway today will indicate a Task Qty. of "100" and a unit of measure of "Miles", whereas the same task on another day might indicate only 80 miles due to the steep inclines of the stretch of highway being paved on that day.

8 Material List—Enter the code identifying the material list that contains the parts needed for the deferred maintenance.
   The system automatically populates Material List Revision.

9 Trade—Enter the trade required to perform the deferred maintenance.

10 People Required—Enter the number of people required to perform the deferred maintenance.

11 Duration (Days)—Enter the estimated number of days needed to complete the deferred maintenance.

12 Estimated Hours—Enter the estimated number of hours needed to complete the deferred maintenance.

   Note: Estimated Hours must be less than or equal to People Required times 24 times Duration (Days).

Complete steps 14-20 only if you use the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS).
**Note:** The system will copy the VMRS-related information you enter on this form to the work order to which the deferred maintenance is assigned.

13 **Reason For Repair**—Enter the reason the vehicle needs repair (Code Key 14).
14 **Work Accomplished**—Enter the work performed on the vehicle (Code Key 15).
15 **Technician Part Failure**—Enter the reason the technician or supplier thinks the vehicle failed (Code Key 18).
16 **Manufacturer**—Enter the Manufacturer/Supplier Code (Code Key 34) to associate with the vehicle.
17 **System Level**—Enter the VMRS code identifying the system, e.g., brakes, frame, suspension, needing repair (Code Key 31).
18 **Assembly Level**—Enter the VMRS code identifying the subsystem needing repair (Code Key 32). The values available are based on the system-level code.
19 **Component Level**—Enter the VMRS code identifying the specific component or part needing repair (Code Key 33). The values available are based on a combination of the system-level code and the assembly-level code.
20 **Hired Labor**—Select to indicate that the deferred maintenance will be completed by an external source.
21 **Labor Type**—Select the type of labor needed if you selected Hired Labor.
22 **Supplier**—Enter the supplier for the deferred maintenance.
   The system automatically populates **Supplier Org.**
23 **Activity Comments**—Enter comments or instructions for the deferred maintenance.
24 **Work Order**—Enter when ready to assign the deferred maintenance to a new work order.
25 **Click Save Record.**
   The system automatically populates **Deferred Date.**

**Adding parts to deferred maintenance**

Add, delete, change or view parts for deferred maintenance.

To add parts to deferred maintenance:

1. Open the **Deferred Maintenance** form.
2. Select the deferred maintenance for which to add parts, and then click the **Parts** tab.
3. **Click Add Part.**
4. **Part**—Enter the part to add to deferred maintenance. The system automatically populates the part description in the adjacent field, **Part Source**, **Part Org.**, **UOM, Track by Asset, Track by Lot**, and **Planned Source**.
5. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6. **Planned Source**—Enter the planned source for the part, e.g., **Direct Purchase** for a part purchase ordered from an external source, or **Stock** for a part ordered from internal stock.
7. **Planned Qty.**—Enter the quantity of the part planned for the deferred maintenance.
Creating maintenance patterns

A maintenance pattern is a schedule of predefined jobs used to perform a preventive maintenance cycle. A maintenance pattern tells how the system should generate work orders for the maintenance pattern, and whether the resulting PM work order generation is based primarily on a time interval (weekly, monthly, annually), or on a meter interval (ex. 3000 miles) or both.

To create maintenance patterns:

1. Open the Maintenance Pattern form.
2. Click New Record.
3. Organization—Enter the organization of the maintenance pattern.
4. Maintenance Pattern—Enter a unique code identifying the maintenance pattern, and then enter a description of the maintenance pattern in the adjacent field.
5. Type—Select the maintenance pattern type.
6. Class—Enter the maintenance pattern class.
    The system automatically populates Class Org.
7. Meter #1 UOM—Enter the unit of measure for meter #1 for the maintenance pattern.
8. Meter #1 Releases Use—Select the release method for which Meter #1 uses to trigger the release of work orders.
9. Meter #2 UOM—Enter the unit of measure for meter #2 for the maintenance pattern.
10. Meter #2 Releases Use—Select the release method for which Meter #2 uses to trigger the release of work orders.
11. Pattern Start Date—Enter the start date for the maintenance pattern.
12. Supervisor—Enter the supervisor for the maintenance pattern.
13. Click Save Record.
    The system automatically populates Created By and Date Created.

Note: To copy the maintenance pattern, right-click and click Copy Maintenance Pattern.

Adding sequences to maintenance patterns

A sequence defines the work to be completed on a maintenance pattern job as well as the relative chronology in which the work will be performed within the maintenance pattern, and the interval (time or meter) for a work order to be generated.

To add sequences to maintenance patterns:
1 Open the Maintenance Patterns form.

2 Select the maintenance pattern for which to add a sequence, and then click the **Sequence** tab.

3 Click **Add Sequence**.

4 **Sequence**—Enter the sequence number for which the work will be performed.

5 **Standard WO**—Enter the standard work order to associate to the sequence in the maintenance pattern.

6 **WO Description**—Enter a description for the work order sequence.

7 **Calculate from Basis**—Select to copy the sequences of the maintenance pattern to the new maintenance pattern.

   **Note:** **Actual Close Date**—When generating a WO, the work order due date will be the actual closing date of the previous work order, plus the defined interval for the selected sequence.

   **Due Date**—When generating a WO, the WO due date will be the due date of the previous work order plus the defined interval for the selected sequence.

   **Scheduled Start Date**—When generating a WO, the WO due date will be the schedule start date of the previous work order plus the defined interval for the selected sequence.

8 **Perform After**—Enter a numerical value for the period interval, and then select a value for the perform after UOM to flag the system to schedule work orders based on dates. For example, enter 5 for Perform After and Months for perform after UOM, which flags the system to perform the work (or release work orders associated to the maintenance pattern) after a 5 month interval.

   **Note:** You may select to flag the system to schedule work orders based on an interval time period or a meter reading interval. If you selected a value in **Perform After** you chose to flag the system to perform the work on an interval time period. If you prefer to flag the system to perform the work on a meter reading interval, leave **Perform After** blank and enter a value for **Meter #1 Interval**.

9 **Meter #1 Interval**—Select to flag the system to schedule the work orders (or release work orders associated to the maintenance pattern) based on meter readings.

   The system automatically populates **Meter #1 UOM**.

10 **Meter #2 Interval**—Select to flag the system to schedule the work orders (or release work orders associated to the maintenance Meter #2 Interval pattern) based on meter readings.

   The system automatically populates **Meter #2 UOM**.

11 **Ok Window**—Enter the value to use for the Ok window.

12 **Near Window**—Enter the value to use for the near window.

13 **Release Window**—Enter the value to use for the release window.

14 Click **Submit**.

---

**Managing equipment for maintenance patterns**

Manage equipment for maintenance patterns by creating or deleting equipment associations. The system performs work on equipment associated to the maintenance pattern in the sequential order designated on the **Sequences** page of the **Maintenance Patterns** form.
Associate equipment to a maintenance pattern so that the system may create a work order for the associated equipment. Activate maintenance patterns with initial sequences and associated equipment to start the process of creating maintenance pattern work orders. Deactivate maintenance patterns to stop a maintenance pattern for the selected pieces of equipment.

Adding equipment to maintenance patterns

To add equipment to maintenance patterns:

1. Open the Maintenance Pattern form.
2. Select the maintenance pattern for which to add equipment, and then click the Equipment tab.
3. Click Add Equipment.
4. **Equipment**—Enter the equipment to add to the maintenance pattern. The system automatically populates the equipment description and Equip. Org., Status, Test Point Set, Dormant Start, Dormant End and Reuse Dormant Period from the selected equipment record.
5. **Test Point Set**—Enter the test point set for calibration of the equipment.
6. **Dormant Start**—Enter the date on which the dormant period for the PM begins.
7. **Dormant End**—Enter the date on which the dormant period for the PM ends.
8. **Reuse Dormant Period**—Select to use the same specified dormant period for the PM on a yearly basis.
9. **Date Deactivated**—Enter the date after which work order generation stops.
10. **WO Department**—Enter the department of the work order.
11. **WO Location**—Enter the location of the work order.
    The system automatically populates WO Loc. Org.
12. **WO Cost Code**—Enter the cost code of the work order.
13. **WO Assigned To**—Enter the person responsible for the work.
14. **WO Assigned By**—Enter the person assigning the work.
15. **Work Order Org.**—Enter the organization of the work order.
16. **Due Date**—Enter the due date of the first work order.
    The system automatically populates Perform After, perform after UOM, and Meter #1 Due Date.
17. **Meter #1 Due**—Enter the reading due value for the first meter.
    The system automatically populates Meter #1 Interval, meter #1 UOM, and Meter #2 Due Date.
18. **Meter #2 Due**—Enter the reading due value for the second meter.
    The system automatically populates Meter #2 Interval and meter #2 UOM.
19. Click Submit.
    The system automatically populates Insertion Date.

   **Note:** If you populate any of the replacement values (e.g., WO Department, WO Location, WO Cost Code, WO Assigned To or WO Assigned By), the system replaces default values from the equipment record when a maintenance pattern work order is created with these replacement values.

To activate a maintenance pattern for equipment, click **Activate MP**.
To deactivate a maintenance pattern for equipment, click **Deactivate MP**.
Activating maintenance patterns for equipment

Start the maintenance pattern for selected equipment, which will generate the first work order for all selected equipment.

To activate maintenance patterns for equipment:

1. Open the Maintenance Pattern form.
2. Select the maintenance pattern to activate for equipment, and then click the Equipment tab.
3. Click Activate MP.
4. Initial Sequence—Enter the sequence number that the pattern will use to create the first maintenance pattern work order.
   
   **Note:** A maintenance pattern does not necessarily start with the first sequence in the list of Sequences on the Sequence tab.

5. Due Date—Enter the due date of the initial work order.
6. Meter #1 Due—Enter the reading due value for the first meter.
   The system automatically populates Meter #1 UOM.
7. Meter #2 Due—Enter the reading due value for the second meter.
   The system automatically populates Meter #2 UOM.
8. Select—Select one or more equipment records, and then click Submit.

Deactivating maintenance patterns for equipment

Stop the maintenance pattern for selected equipment, which will delete the work order for equipment.

**Note:** The system deletes only work orders with Status of Awaiting Release.

The system deactivates the maintenance pattern and flags the selected equipment Inactive.

To deactivate maintenance patterns for equipment:

1. Open the Maintenance Pattern form.
2. Select the maintenance pattern to deactivate for equipment, and then click the Equipment tab.
3. Click Deactivate MP.
4. Select—Select one or more records, and then click Submit.

Viewing work orders for maintenance patterns

View and select work orders associated with maintenance patterns.

To view work orders for maintenance patterns:

1. Open the Maintenance Patterns form.
2. Select the maintenance pattern for which to view work orders, and then click the Work Orders tab.
Work management

3 View the list of work orders.
   
   **Note:** To select a work order in the list, click on the work order.

## Copying maintenance patterns

Copy existing child records and header records from an existing maintenance pattern to a new maintenance pattern.

To copy maintenance patterns:

1 Open the **Maintenance Patterns** form.
2 Select the maintenance pattern for which to copy records, and then click the **Record View** tab.
3 Right-click on the form, and then select **Copy Maintenance Pattern**.
4 **New Maintenance Pattern**—Enter a unique identifying name for the new maintenance pattern, and then enter a description of the maintenance pattern in the adjacent field.
5 **Custom Field Values**—Select to copy the custom field values to the new maintenance pattern.
6 **User Defined Fields**—Select to copy the user defined fields to the new maintenance pattern.
7 **Sequences**—Select to copy the sequences of the maintenance pattern to the new maintenance pattern.
8 **Equipment**—Select to copy the equipment to the new maintenance pattern.
9 **Comments**—Select to copy the comments to the new maintenance pattern.
10 **Documents**—Select to copy the documents to the new maintenance pattern.
11 Click **Submit**.

## Scheduling work orders daily

Schedule work orders daily on the WO Daily Scheduling form.

To schedule work orders daily, first define the selection criteria for the following four classifications:

1 **Equipment Selection Parameters**
2 **Work Order Selection Parameters**
3 **Activity Selection Parameters**
4 **Employee Selection Parameters**

## Defining parameters for work order daily scheduling

Create and update selection parameters for scheduling daily work orders on the WO Daily Scheduling form.
On the Parameters page, define the selection criteria for locating work orders, activities, employees, and equipment to display on the Equipment, WO Activity, and Employee Preview tabs.

To define parameters for work order daily scheduling:

1. Open the **WO Daily Scheduling** form.
2. **Parameter List**—Select the saved selection parameters if applicable. The system retrieves the saved selection criteria.
3. **Session ID**—Enter the ID for the session.
   - **Note**: Enter **Session ID** if you are working on an existing session. If you are creating a new session, the system automatically populates **Session ID** after you click **Create/Refresh Previews**.
4. **Work Order Org**.—Enter the work order organization.
5. **Work Order**—Enter the work order.
6. **WO Department**—Enter the department of the work order.
7. **WO PM Schedule**—Enter the PM schedule for the work order.
8. **WO Project**—Enter the project of the work order.
9. **WO Project Budget**—Enter the project budget of the work order.
10. **WO Equipment**—Enter the equipment of the work order.
11. **WO Equipment Org.**—Enter the equipment organization of the work order.
12. **WO Location**—Enter the location of the work order.
13. **WO Location Org.**—Enter the location organization of the work order.
14. **WO Type**—Enter the work order type.
15. **WO Priority**—Enter the work order priority.
16. **WO Status**—Enter the status of the work order.
17. **WO Reported By**—Enter the employee requesting the work.
18. **WO Assigned To**—Enter the employee responsible for the work order.
19. **WO Assigned By**—Enter the supervisor who assigned the work order.
20. **WO Class**—Enter the class of the work order.
21. **WO Class Org.**—Enter the class organization of the work order.
22. **WO Criticality**—Enter the criticality code to indicate the relevant importance of the work order to the overall production of goods or services for your organization.
23. **WO Shift**—Enter the shift during which the work is requested to be performed.
24. **WO Maintenance Pattern**—Enter the maintenance pattern to which the work order belongs.
25. **WO MP Org.**—Enter the maintenance pattern organization to which the work order belongs.
26. **Sequence**—Enter the sequence for which the work order will be performed on the maintenance pattern.
27. **Campaign**—Enter the campaign to which the work order belongs.
28. **Campaign Event**—Enter the campaign event to which the work order belongs.
29. **Equipment**—Enter the equipment to use for daily work order scheduling.
30 **Equipment Org.**—Enter the organization of the equipment.
31 **Equipment Type**—Enter the type of equipment.
32 **Equipment Status**—Enter the status of the equipment.
33 **Equipment Class**—Enter the class of the equipment.
34 **Equipment Class Org.**—Enter the class organization of the equipment.
35 **Equipment Category**—Enter the category of the equipment.
36 **Equipment Cost Code**—Enter the cost code of the equipment.
37 **Equipment Department**—Enter the department of the equipment.
38 **Equipment Parent Equipment**—Enter the parent equipment of the equipment. Select more than one parent equipment if applicable.
39 **Equipment Parent Equipment Org.**—Enter the parent equipment organization of the equipment.
40 **Equipment Location**—Enter the location of the equipment.
41 **Equipment Location Org.**—Enter the location organization of the equipment. Follow these steps to define work order activity selection parameters.
42 **Activity Trade**—Enter the activity trade.
43 **Activity Task**—Enter the activity task.
44 **Beginning Activity Start Date**—Enter the beginning start date for the activity.
45 **Ending Activity Start Date**—Enter the ending start date for the activity. Follow these steps to define employee selection parameters.
46 **Employee Department**—Enter the department of the employee.
47 **Employee Class**—Enter the class of the employee.
48 **Employee Class Org.**—Enter the class organization for the employee.
49 **Employee Trade**—Enter the employee's trade or craft.
50 **Shift**—Enter the shift on which the employee works.
51 **Crew**—Enter the crew of the employee.
52 **Crew Org.**—Enter the crew organization of the employee. Follow these steps to define a date range for the scheduled work order.
53 **Start Date**—Enter the start date for the scheduled work order.
54 **End Date**—Enter the end date for the scheduled work order. Follow these steps to define the scheduling options for the work order.
55 **Threshold Percent Between Lightly/Moderately Scheduled**—Enter the percentage of daily employee available hours to designate the point at which the calendar switches between lightly scheduled and moderately scheduled.
56 **Unscheduled (% Scheduled=0) Color**—Enter the color to designate the unscheduled days on the calendar view.
57 **Lightly Scheduled (% Scheduled >= Threshold) Color**—Enter the color to designate the lightly scheduled days on the calendar view.
58 **Moderately Scheduled (% Scheduled >= Threshold) Color**—Enter the color to designate the moderately scheduled days on the calendar view.
59 **Fully Scheduled (% Scheduled = 100) Color**—Enter the color to designate the fully scheduled days on the calendar view.
Over Scheduled (% Scheduled > 100) Color—Enter the color to designate the over scheduled days on the calendar view.

Generate Availability Through—Enter the date through which to generate scheduling availability.

Click Create/Refresh Previews. The system displays the Equipment Preview page listing all of the equipment for which to schedule work orders. The system automatically populates Session ID for new sessions.

Selecting equipment for work order daily scheduling

Preview the equipment before selecting equipment to use for work order daily scheduling.

Once equipment selections have been made, proceed to the WO Activity Preview page, the Employee Preview page, or to the Scheduling page.

To select equipment for work order daily scheduling:

1 Open the WO Daily Scheduling form.
2 Parameter List—Select the saved selection parameters.
3 Click the Equipment Preview tab.
   - Note: Click Create Refresh Preview to display the results on the Preview tab without entering a parameter list.
4 Select—Select the equipment for which to perform work order daily scheduling, and then choose one of the following options:
   - To preview and select work order activities for work order daily scheduling, click the WO Activity Preview tab.
   - To start labor scheduling, click Start Labor Scheduling.

Selecting work order activities for work order daily scheduling

Preview the work order activities before selecting the activities to use for work order daily scheduling.

Once the activity selections have been made, proceed to the Employee Preview page, or to the Scheduling page.

To select work order activities for work order daily scheduling:

1 Open the WO Daily Scheduling form.
2 Parameter List—Select the saved selection parameters.
3 Click the WO Activity Preview tab.
   - Note: Click Create Refresh Preview to display the results on the Preview tab without entering a parameter list.
4 Select—Select the work order and activities for which to perform work order daily scheduling, and then choose one of the following options:
  • To preview and select employees for work order daily scheduling, click Employee Preview.
  • To preview and select equipment for work order daily scheduling, click the Equipment Preview tab.
  • To start labor scheduling, click Start Labor Scheduling.

Selecting employees for work order daily scheduling

Preview and select employees for work order daily scheduling based on employee selection parameters specified on the Parameters page. Once employees have been selected, proceed to the Scheduling page to schedule the daily work orders.

To select employees for work order daily scheduling:

1 Open the WO Daily Scheduling form.
2 Parameter List—Select the saved selection parameters.
   Note: Click Create Refresh Preview to display the results on the Preview tab without entering a parameter list.
3 Click the Employee Preview tab.
4 Select—Select the employees for which to perform work order daily scheduling, and then click Start Labor Scheduling.

Scheduling labor for work order daily scheduling sessions

Review and modify employee schedule information, work order details, activity schedules, planned parts availability, and booked labor for an activity.

To schedule employees for work order daily scheduling sessions:

1 Open the WO Daily Scheduling form.
2 Parameter List—Select the saved selection parameters for an existing scheduling session.
3 Click the Scheduling tab.
4 To filter employees, click Filter Employee.
5 Choose one of the following options:
   • Match Department—Select to display employees in the same department.
   • Match Trade—Select to display employees in the same trade.
   • Match Shift—Select to display employees on the same shift.
   • Qualified Employees—Select to display qualified employees for the highlighted work order activity(s).
Drag and drop work order activities to selected employee calendar days. The system creates the appropriate labor schedule record.

**Note:** Drag more than one work order activity at a time to an employee calendar day. The system creates a labor schedule record for each work order activity for the employee calendar day.

Drag one employee calendar day to another calendar day for same employee, e.g., drag Wednesday to Friday. The system updates the scheduled date for each labor schedule record(s) on the dragged employee calendar day.

Drag one employee calendar day to another employee calendar day. The system deletes the labor schedule record(s) on the dragged employee calendar day and creates the necessary labor schedule records on the dropped employee calendar day.

See the following table for more options on work order daily scheduling sessions:

<table>
<thead>
<tr>
<th>Icon Hover Text</th>
<th>Description</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>WO Details</td>
<td>View and modify work order and activity details for the selected work order activity</td>
<td>The system opens the WO Details popup.</td>
</tr>
<tr>
<td>Activity Schedule</td>
<td>View and modify labor schedules for the selected work order activity</td>
<td>The system opens the Labor Schedules popup.</td>
</tr>
<tr>
<td>View Planned Part Availability</td>
<td>View planned part availability for the selected work order activity</td>
<td>The system opens the Planned Part Availability popup.</td>
</tr>
<tr>
<td>Part Availability Overlay</td>
<td>View available dates for selected materials to schedule work order activities</td>
<td>The system protects or shades the calendar grid cell dates if all work order activity material list parts are unavailable. If a calendar grid cell is protected due to part overlay (unavailability), then the system cannot schedule the work order activity for that particular date.</td>
</tr>
<tr>
<td>View Activity Booked Labor</td>
<td>View booked labor for work order activity for the selected work order activity</td>
<td>The system opens the Booked Labor popup.</td>
</tr>
<tr>
<td>Previous Week</td>
<td>View the previous week</td>
<td>The system advances the calendar grid to the previous week.</td>
</tr>
<tr>
<td>Go To Week</td>
<td>View a specific week</td>
<td>The system opens a calendar popup. Select the Start Date.</td>
</tr>
<tr>
<td>Next Week</td>
<td>View the following week</td>
<td>The system advances the calendar grid forward one week.</td>
</tr>
<tr>
<td>Filter Employees</td>
<td>Filter Employees</td>
<td>The system displays employee filter options.</td>
</tr>
<tr>
<td>Icon Hover Text</td>
<td>Description</td>
<td>Results</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Employee Schedules</td>
<td>View and modify labor schedules for selected employees</td>
<td>The system opens the Labor Schedules popup.</td>
</tr>
<tr>
<td>View Employee Booked Labor</td>
<td>View booked labor for the selected employee</td>
<td>The system opens the Booked Labor popup.</td>
</tr>
<tr>
<td>Close Session and Update Work Orders</td>
<td>Close the session and update work orders</td>
<td>The system closes the session, updates and creates activity labor schedules outside the session, and returns to the Parameters page.</td>
</tr>
<tr>
<td>Cancel Session</td>
<td>Cancel the session</td>
<td>The system cancels the session.</td>
</tr>
</tbody>
</table>

**Modifying work order details**

View and modify work order and activity details on the Scheduling page of the WO Daily Scheduling form.

*Note:* A work order activity must be highlighted in the grid prior to performing this action.

To modify work order details:

1. Click **WO Details**.
2. **New Work Order Status**—Select the new work order status.
3. **Hours Remaining to be Worked**—Enter or modify the hours remaining to be worked for the activity.
4. **Completed**—Select if the work for the activity has been completed.
5. Click **Submit**.

**Modifying labor schedules for work order activities**

View and modify labor schedules for selected work order activities on the Scheduling page of the WO Daily Scheduling form.

*Note:* A work order activity must be highlighted in the grid prior to performing this action.

To create or modify labor schedules for work order activities:

1. Click **Activity Schedule**.
2. Choose one of the following options:
   - To add employees Not in Session to a selected labor schedule, click **Add Employee to Session**.
   - To add a labor schedule to the work order activity, click **Add Schedule**. Enter the Employee, Scheduled Date, and then enter Start Time and End Time, or enter the Scheduled Hours for the selected work order activity. Enter the Department and Shift of the employee. Click **Submit**.
   - To add activities from a work order Not in Session, click **Add WO to Session**.
Viewing planned part availability for work order activities

View planned part availability for work order activities to display in a list of parts that have been planned for a work order activity.

To view planned part availability for work order activities:

1 Select a work order activity, and then click **View Planned Part Availability**.
2 **Store**—Enter a different store for which to view part availability information as necessary. The system updates the Planned Part Availability list. The system displays availability in the default **Store** for the work order **Department** when the popup opens.
3 Click **Close**.

Modifying labor schedules for employees

View and modify labor schedules for selected employees on the Scheduling page of the WO Daily Scheduling form.

To modify labor schedules for employees:

1 Select an employee, and then click **Employee Schedule**.
2 Click **Add Schedule**.
3 **WO**—Enter the work order for which to add an employee schedule. The system automatically populates the work order description, **Tools**, **Frozen**, **Not in Session**, **Act. Est. Hours**, **Act. Sched. Hours**, and **Act. Actual Hours**.
4 **Activity-Trade**—Select the activity and trade for the employee labor schedule.
5 **Scheduled Date**—Select the scheduled start date of the work order activity.
6 **Scheduled Hours**—Enter the number of hours to schedule for the work order.
7 **Start Time**—Enter the time the scheduled work order should begin.
8 **End Time**—Enter the time the scheduled work order should end.
9 **Department**—Enter the department of the employee.
10 **Shift**—Enter the employee’s shift on the work order.
11 Click **Submit**.
12 Click **Close**.

   **Note:** To add activity labor schedules to the session, click **Add WO to Session**.

Viewing booked labor for work order activities

View the booked labor of employees for work order activities.

To view booked labor for work order activities:

1 Select a work order activity, and then click **View Activity Booked Labor**.
2 View the information.
3 Click **Close**.

### Viewing booked labor for employees

View all booked labor for selected employees.

To view booked labor for employees:

1. Select an employee, and then click **View Employee Booked Labor**.
2. View the information.
3. Click **Close**.

### Defining adjustments

Define adjustments to apply to customer contracts and rental agreements to quickly identify extra charges or discounts for the contract. An adjustment could be an extra charge for damaged equipment or a late return of a rented vehicle.

Similarly you may also define discounts or credits on the Adjustments form by entering a negative rate for the adjustment.

When defining adjustments on this form, associate a standard work order to the adjustment to enable users to create a work order from an adjustment for the customer contract or rental contract, if required.

To define adjustments:

1. Open the Adjustments form.
2. Click **New Record**.
3. **Organization**—Enter the organization of the adjustment.
4. **Adjustment**—Enter a unique code identifying the adjustment, and then enter a description of the adjustment in the adjacent field.
5. **Rate**—Enter the rate for the adjustment, e.g., enter 100 for an extra charge of $100, or enter -100 for a $100 credit.
   The system automatically populates the currency based on the selected **Organization**.
6. **Standard WO**—Enter the standard work order to associate with the adjustment. When a work order is created from the adjustment on the customer contract, the system applies this standard work order.
7. **Out of Service**—Select to exclude the adjustment in lookups.
8. Click **Save Record**.
Defining contract templates

Create a template to define an actual contract with a customer. Include high level contract details, charge definitions, contract clauses, and comments. After creating a template, use the template to quickly create a contract or modify a contract.

To define contract templates:

1. Open the Contract Templates form.
2. Click New Record.
3. **Organization**—Enter the organization of the contract template.
4. **Contract Template**—Enter a unique code identifying the contract template, and then a description of the contract template in the adjacent field.
5. **Class**—Enter the class of the contract template. The system copies the class to the contract along with any custom fields defined on the template.
6. **Contract Class**—Enter the class of the contract. This value is copied to the contract along with any custom fields defined on the template.
7. **Default Invoice Status**—Select the default status for the invoice after the automatic invoice generation process is complete.
8. **Where Used**—Select Customer Contract or Rental Contract to specify where the template will be used.
9. **Rounding Hours**—Select the method by which to round the hours for the invoice.
10. **Rounding Days**—Select the method by which to round the days for the invoice.
11. **Hourly Invoicing Start Time**—Enter the daily time in hours and minutes to begin invoicing the customer for the contract.
12. **Hourly Invoicing End Time**—Enter the daily time in hours and minutes to stop invoicing the customer for the contract.
13. **Invoice Every**—Enter the number, and then select the interval by which to invoice customers on the contract. For example, enter 2 and then select Week to invoice the customer every 2 weeks.
14. **Out of Service**—Select to exclude the contract template in the list of values on the Customer Contract and Rental forms.
15. Click Save Record.

Defining work order criteria for contract templates

Specify which work orders to include on the invoice. Work order selection criteria includes department, work order class, and work order type.

To define work order criteria for contract templates:

1. Open the Contract Templates form.
2. Select the contract template for which to define work order criteria, and then click the WO Criteria tab.
3. Click Add WO Criteria.
4 **Department**—Enter the department of the work orders to include on the invoice. The system automatically populates the department description in the adjacent field.

5 **WO Class**—Enter the class of the work orders to include on the invoice. The system automatically populates **WO Class Org.** and the work order class description in the adjacent field.

6 **WO Type**—Enter the type of the work orders to include on the invoice. Select to include **Breakdown**, **Preventive Maintenance**, **Default work order type**, **Calibration**, **Direct Issue**, **Repairable Spare**, **Standard WO**, or **Scheduled** work order types on the invoice.

7 **Grouping**—Enter a unique name to identify the grouping of selected work order types. The system references the group on the invoice for easy identification.

   **Note**: The system allows more than one grouping for the same work order type. If more than one grouping is found for the same work order type, the system selects the first grouping for reference on the invoice.

8 Click **Submit**.

**Associating clauses with contract templates**

Associate clauses with contract templates to define agreements for the customer contracts.

To associate clauses with contract templates:

1 Open the Contract Templates form.
2 Select the contract template for which to associate clauses, and then click the Clauses tab.
3 Click **Add Clause**.
4 Specify this information:
   - **Contract Clause**: Enter a predefined ISO clause or a user-defined clause. You can associate multiple clauses with a contract template. The system automatically populates **Organization** and the contract clause description.
   - **Sequence**: Enter the sequence number for the clause.
5 Click **Submit**.

**Associating sales prices with contract templates**

Associate sales prices for entities (Parts, Tasks, PM Schedules, Standard Work Order, and Service Problem Codes) to create invoice lines using a fixed sales price rather than the actual work order costs (part issues, time sheets, tool costs) tracked by the system.

Sales prices defined on the contract template level will be copied to the contract when the template is referenced on that contract. These sales prices will take precedence over any sales prices directly
associated to any of the entities. So a sales price for a bearing can be overwritten on contract level if desired and this price will then be invoiced, otherwise the system uses the standard sales price of the bearing defined on the Parts form.

To associate sales prices with contract templates:

1. Open the Contract Templates form.
2. Select the contract template for which to associate sales prices, and then click the Sales Prices tab.
3. Click Add Sales Price.
4. Entity—Select the entity for which to associate sales prices.
5. Date Effective—Enter the date this sales price will go into effect.
6. Code—Enter the system code associated with the entity. The system automatically populates Code Org. and the code description in the adjacent field.
7. Organization—Enter the organization to associate to the sales prices. This Organization will use these sales prices.
8. Sales Price—Enter the sales price to associate with the entity for the customer contract created from this template. The system automatically populates the currency based on the selected Organization.
9. Date Expired—Enter the date the sales price will expire.
10. Store—Enter the store to associate with the sales price when parts entities are selected. If no Store is entered, the system applies the sales price to all stores in the selected Organization that are not specifically mentioned.
11. Condition—Enter the condition if the entity is a part that is a condition tracked parent part. If the selected entity for the part is a condition tracked child part, the system will automatically populate Condition.
12. Click Submit.

Defining charges for contract templates

Specify the charges to invoice to customers, including work order, fuel, and lease charges. These charges defined on the template form the basis for the charges used on the customer contract and customer rental.

To define charges for contract templates:

1. Open the Contract Templates form.
2. Select the contract template for which to define charges, and then click the Charge Definitions tab.
3. Click Add Record.
4. Invoicing Org.—Enter the organization responsible for the invoicing.
5. Charge Category—Select the category of the charges for this template. Select from Sales Transactions, WO Charges, Fuel Charges, Energy Charges, Usage Charges, or One Time Charges.

Note: You can combine different charges on a template or a contract.
6 Charge Level—Select the level for the charges. Select Subcategory Adjustment or Charge Category Adjustment.

7 Charge Subcategory—Select the subcategory of the charges for this template based on the Charge Category previously selected. For example, for Fuel Charges, select from Diesel, Premium, any other fuels you defined, or All Fuels.

Note: For Fuel Charges define fuels in the fuel management area; for Energy Charges define commodities on the Commodities form; for Usage Charges define subcategories on system codes entity CCOC; and for one Time Charges define subcategories on the system entity CCOC.

8 Invoicing Description—Enter a description of the charge to include on the invoice.

9 Invoice—Select to invoice the customer for the charges defined here.

10 Invoice Conditional—Select if there are conditions associated with the invoice for these charges.

Note: If Invoice Conditional is selected on this Charge Level, if the lower Charge levels add up to zero dollars no additional charges are determined on this level.

If Invoice Conditional is not selected, charges on this level may be applied although lower level charges add up to zero.

11 Rate—Enter the rate for the charges defined here.

Note: Rate is required for usage and one-time charges, and can also be used optionally on energy charges.

12 Adjustment Unit Price—Enter the adjustment to apply to the transaction price.

13 Adjustment Transaction—Enter the adjustment to apply to the transaction.

14 Adjustment % Before—Enter the percent with which to adjust the transaction amount prior to price or transaction adjustments are applied.

15 Adjustment % After—Enter the percent with which to adjust the transaction amount after, Before %, price or transaction adjustments are applied.

16 Minimum Quantity—Enter the minimum quantity to invoice.

17 Minimum Charge—Enter the minimum amount to invoice.

18 Maximum Charge—Enter the maximum amount to invoice.

19 Free Up To—Enter a monetary amount to designate the amount by which the invoice will be reduced, or the amount that is free of cost. E.g., the first $250 of work order charges are free.

20 Taxable—Select to indicate this transaction line is taxable on the invoice.

21 Usage UOM—Enter the unit of measure, e.g., miles, kilometers that the system will apply to the usage-based rate.

22 Charge Estimated Usage—Select to add estimates for the usage and energy consumption of the equipment to the periodic invoices.

23 Rollover—Select to roll over the difference between the actual usage and Minimum Quantity invoiced when actual usage is less than Minimum Quantity.

24 Trade—Enter the trade for the charge definition. Trade is only relevant for work order charges.

25 Type of Hours—Enter the type of hours for the charge category on the invoice.

26 Part Class—Enter the part class for the charge definition. Part Class is only relevant for work order charges.
27 Click **Submit**.

**Associating discounts with contract templates**

Add, update, and delete discount charges for contract templates.

To associate discounts for contract templates:

1. Open the Contract Templates form.
2. Select the contract template for which to associate discounts, and then click the Discounts tab.
3. Click **Add Discount**.
4. **Minimum Value**—Enter the minimum charge value for which the discount should apply, and then enter the currency in the adjacent field.
5. **Discount %**—Enter the discount percentage to apply once the minimum value threshold is met.
6. **Apply to Each Invoice**—Select to apply the discount to each individual invoice. If unselected the discount is associated to the contract level and takes all invoices for the contract into consideration.
7. **Apply to Full Amount**—Select to apply the discount to the full amount of the invoice or the contract. If unselected the system applies the discount to the difference between the invoice or contract total amount and **Minimum Value**.
8. Click **Submit**.

**Copying contract templates**

Copy the header details and child records of customer contract templates to quickly create a new template.

To copy contract templates:

1. Open the Contract Templates form.
2. Select the contract template to copy, and then click the Record View tab.
3. Right-click on the form, and then select **Copy Contract Template**.
4. **New Template Code**—Enter a unique code identifying the new contract template, and then enter a description of the contract template in the adjacent field.
5. **Custom Field Values, Clauses, WO Criteria, Sales Prices, Discounts, Charge Definitions, Commodities, Comments, and Documents**—Select which related details to copy to the new contract template.
6. Click **Submit**.
Defining customer contracts

Define new contracts for customers. The customer contract details information such as charges, clauses, comments, and invoice details.

To define customer contracts:

1. Open the Customer Contracts form.
2. Click New Record.
3. Organization—Enter the organization to which the customer contract belongs.
4. Customer Contract—Enter a unique code identifying the customer contract, and then enter a description of the customer contract in the adjacent field.
5. Customer—Enter the customer for which to create the contract. The system automatically populates Customer Org.
7. Contract Template—Enter the template with which to create the customer contract. The template selected defines the high level details of this contract. The system automatically populates Contract Template Org.
8. Class—Enter the class of the customer contract. The system automatically populates Class Org.
9. Tax Code—Enter the tax code to associate with the customer contract.
10. Start Date—Enter the date the customer contract becomes available.
11. End Date—Enter the date the customer contract is no longer available.
12. Revisit Date—Enter the date for which to revisit the customer contract.
13. Customer Contact—Enter the person to contact about the contract.
14. Enter the customer's Phone Number and Email Address.
15. Email Invoice—Select to email the customer contact the invoice for the contract.
16. Invoice Every—Enter the time period for which to invoice the customer by entering an integer, and then selecting the time period unit of measure. For example: Enter 2 and then select Weeks to invoice the customer every 2 Weeks.
17. Next Invoice Date—Enter the next date for which to generate an invoice for the customer.
18. Offset Invoice Generation—Enter the number of days for which to offset or delay the generation of the next invoice. Example: Enter 15 to offset generation of the next invoice by 15 days.
19. Default Invoice Status—Select the default status to define for all invoices generated for the customer.
20. Default Invoicing Organization—Enter the default organization to define for all invoices generated for the customer.
21. Invoicing Currency—Enter the currency of the invoices for the customer.
22. Use Fixed Exchange Rates—Select to use fixed exchange rates for the customer when Invoicing Currency and Invoicing Org. differ. The system defaults the exchange rate with the current active exchange rate where the base currency is the Invoicing Org.'s currency and the foreign currency is the Invoicing Currency.
23. Sync Fixed Exchange Rates—Select to sync fixed exchange rates when more than one exchange rate is found for the Invoicing Currency and Invoicing Org., or no exchange rate can be found. The system applies the current active exchange rate to the contract items.
24. Closed WO Only—Select to display only the work orders with a Closed status on the invoice.
25 **Rounding Hours**—Select hourly rounding options for the contract. Round the hours of the contract up 15 minutes, down 15 minutes, up 30 minutes, down 30 minutes, or elect not to round the contract hours.

26 **Rounding Days**—Select daily rounding options for the contract. Round the days of the contract up, down, or elect not to round the contract days.

27 **Hourly Invoicing Start Time**—Enter the time in hours and minutes (ex. 3:00) that the system will begin to invoice the customer for the contract work.

28 **Hourly Invoicing End Time**—Enter the time in hours and minutes (ex. 23:00) that the system will stop invoicing the customer for the contract work.

29 Click **Save Record**.

The system automatically populates **Last Invoice Date**, **Last Invoice**, **Amount Invoiced**, **Revision**, **Requested By**, **Date Requested**, **Approved By**, **Date Approved**, and **Revision Reason**.

*Note:* Click **Create New Revision** to create a new revision of the contract from any previous revision of the contract when the previous revision has a system status other than **Unfinished** or **Request Approval**.

Click **Copy Contract** to copy the header details and child records of the customer contract. See "Copying customer contracts" on page 538.

Click **Reset Contract Charge Definitions** to reset manual changes applied to the charge definitions for this contract.

---

**Defining contract items for customer contracts**

Define contract items and details for customer contracts. Contract items consist of equipment, projects, or work orders to include on the customer contract. A contract may have many items associated.

To define contract items for customer contracts:

1. Open the **Customer Contracts** form.
2. Select the customer contract for which to define contract items, and then click the **Contract Items** tab.
3. Click **Add Contract Item**.
4. **Equipment**—Enter the equipment to include on the customer contract. The system automatically populates **Equipment Org**.
5. **Project**—Enter the project to include on the customer contract.
6. **Project Budget**—Enter the project budget to include on the customer contract.
7. **Work Order**—Enter the work order to include on the customer contract.
8. **Customer**—Enter the customer. This can be the customer associated to the contract on the header or any of the children of that customer. The system automatically populates **Customer Org**.
9. **Invoicing Org**.—Enter the invoicing organization that will collect the charges for this contract item.
10. **Tax Code**—Enter the tax rate to be applied to the cost of the contract item.
11. **Contract Template**—Enter the contract template for the selected project, project budget, work order, or equipment. The system automatically populates **Contract Template Org**.
Note: Use this feature to define charge definitions specifically for this contract item if they are different from the other contract items.

12 **Invoicing Description**—Enter a description that will be printed on the invoice.

13 **Use Fixed Exchange Rate**—Select to use fixed exchange rates for the contract item when **Invoicing Currency** and the currency of the **Invoicing Org.** differ. The system defaults the exchange rate with the current active exchange rate where the base currency is the **Invoicing Org.**’s currency and the foreign currency is the **Invoicing Currency**.

14 **Exchange Rate**—Enter the exchange rate for the currency. The system will use this rate if the invoicing currency is different from the invoicing organization currency.

15 **Usage Quantity**—Enter the usage quantity of the contract item to be used on the customer contract invoice.

16 **UOM**—Enter the unit of measure of the usage quantity of the contract item.

17 **Sales Price**—Enter the sales price of the equipment.

18 **Exercise Option**—Select to exercise the equipment sales options specified on this form.

19 **Exercise Date**—Enter the date for which to exercise the equipment sales options.

20 **Sales Tax Code**—Enter the sales tax code of the equipment.

21 **Equipment Status After Sale**—Select the status of the equipment after the automatic invoice generation process is complete and the equipment is sold.

22 Click **Submit**.

Note: To translate the invoicing description, select a record, and then click **Translate Invoicing Description**. View and edit the translated descriptions.

To reset all charge definitions referenced with the contract items for the current contract revision, click **Reset All Charge Definitions**.

To reset the charge definitions for a particular contract item for this contract revision only, select the contract item record for which to reset charge definitions, and then click **Reset Charge Definitions**.

To refresh all tax codes for all contract items for the current contract revision, click **Reset All Tax Codes**.

To refresh all contract templates for all contract items for the current contract revision, click **Reset All Contract Templates**.

To reset the selected contract item for this contract revision only, click **Reset Contract Template**.

### Associating discounts with customer contracts

Add, update, or delete discounts on customer contracts.

To associate discounts with customer contracts:

1. Open the Customer Contracts form.
2. Select the customer contract with which to associate discounts, and then click the Discounts tab.
3. Click **Add Discount**.
4 Minimum Value—Enter the minimum charge value for which the discount should apply, and then enter the currency in the adjacent field.

5 Discount %—Enter the discount percentage to apply once the minimum value threshold is met.

6 Apply to Each Invoice—Select to apply the discount to all invoices regardless of whether the contract invoice reaches the minimum value threshold.

7 Apply to Full Amount—Select to apply the discount to the full amount of the invoice or contract. If unselected, the discount is applied to the difference between the net amount plus adjustments and Minimum Value.

8 Click Submit.

Defining work order criteria for customer contracts

Specify which work orders to include on an invoice by defining work order criteria and associating to any customer contract. Work order selection criteria includes department, work order class, and work order type.

If you do not define work order criteria for a contract, the system includes all work orders for selection on the invoice.

To define work order criteria for customer contracts:

1 Open the Customer Contracts form.

2 Select the customer contract for which to define work order criteria, and then click the WO Criteria tab.

3 Click Add WO Criteria.

Note: If * is entered for any of the work order criteria specified below, the system includes all values for that selection on the invoice.

4 Department—Enter the department of the work orders to include on the invoice. The system automatically populates the department description in the adjacent field.

5 WO Class—Enter the class of the work orders to include on the invoice. The system automatically populates WO Class Org. and the work order class description in the adjacent field.

6 WO Type—Enter the type of the work orders to include on the invoice. Select to include Breakdown, Preventive Maintenance, or Scheduled work order types on the invoice.

7 Grouping—Enter a unique name to identify the grouping of selected work order types. The system references the group on the invoice for easy identification.

Note: The system allows more than one grouping for the same work order type. If more than one grouping is found for the same work order type, the system selects the first grouping for reference on the invoice.

8 Click Submit.
Associating commodities with customer contracts

Associate an energy-related commodity with a customer contract to invoice energy costs to customers. Associating energy-related commodities to a customer contract simplifies energy-related setup of charge definitions.

To associate commodities with customer contracts:

1. Open the Customer Contracts form.
2. Select the customer contract with which to associate commodities, and then click the Commodities tab.
3. Click Add Commodity.
4. Commodity—Enter the commodity to associate with the selected customer contract. The system automatically populates the description of the commodity and Commodity Org.
5. Click Submit.

Note: Adding energy commodities to a customer contract may automatically generate energy-related charge definitions for equipment associated to the contract.

Defining sales prices for customer contracts

Define sales prices for specific entities on a customer contract. Use the sales prices defined here for sales transactions on the customer contract. Sales prices can be defined for specific entities Parts, Tasks, PM Schedules, Standard Work Orders and Service Problem Codes to create invoice lines using a fixed sales price rather than use the actual work order costs tracked by the system, like part issues, time sheets, tool costs, etc.

To define sales prices for customer contracts:

1. Open the Customer Contracts form.
2. Select the customer contract for which to define sales prices, and then click the Sales Prices tab.
3. Click Add Sales Price.
4. Entity—Select the entity for which to define sales prices. Choose from the following list of entities:
   • Parts
   • Tasks
   • PM Schedules
   • Standard work order
   • Service problem codes
5. Code—Enter the code for the entity. The system automatically populates the description and Code Org.
6. Organization—Enter the organization of the selected code.
7. Sales Price—Enter the sales price to specify for the selected entity.
8. Store—Select the store of the entity.
9 **Condition**—Enter the condition if the entity is a part that is a condition tracked parent part. If the selected entity for the part is a condition tracked child part, the system will automatically populate **Condition**.

10 Click **Submit**.

### Associating clauses with customer contracts

Include clauses in customer contracts. For example, state that for each day the contract finished ahead of schedule, he or she receives a bonus. Set up contract clauses prior to associating them with customer contracts.

To associate clauses with customer contracts:

1. Open the Customer Contracts form.
2. Select the customer contract with which to associate clauses, and then click the Clauses tab.
3. Click **Add Clause**.

   **Note**: You can only access the **Clauses** tab and add or delete a clause if the customer contract has a status of Unfinished.

4. **Contract Clause**—Enter a predefined ISO clause or a user-defined clause. You can associate multiple clauses with a customer contract. The system automatically populates the description in the adjacent field, and **Organization**.

5. **Sequence**—Enter a valid number to indicate the order of the contract clause in relation to other associated clauses, if applicable.

6. Click **Submit**.

### Defining charges for customer contracts

Define charge definitions for a customer contract to determine what the system invoices on the contract and how the system generates the invoice. Charge definitions are invoiced per contract item (e.g., a piece of equipment, project, or work order).

Defining charge definitions involves specifying adjustments for invoicing transactions for several charge categories, subcategories, and levels which all help to determine when and how costs are invoiced to customers during the invoice generations process.

See the following table for details on charge definitions categories and subcategories available for selection:

<table>
<thead>
<tr>
<th>Charge Category</th>
<th>Description</th>
<th>Charge Subcategory</th>
</tr>
</thead>
</table>
| WO Charges      | select to associate charge definition records with invoices for work order costs | • Labor  
|                 |             | • Hired Labor  
<p>|                 |             | • Services |</p>
<table>
<thead>
<tr>
<th>Charge Category</th>
<th>Description</th>
<th>Charge Subcategory</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Stock Items</td>
<td>• Stock Items</td>
</tr>
<tr>
<td></td>
<td>• Direct Purchase</td>
<td>• Direct Purchase</td>
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<tr>
<td></td>
<td>• Tool Costs</td>
<td>• Tool Costs</td>
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<tr>
<td></td>
<td>• All Cost Types</td>
<td>• All Cost Types</td>
</tr>
<tr>
<td>Sales Transactions</td>
<td>select to associate charge definition records with invoices for work order related costs against a fixed sales price</td>
<td>• Service Problem Codes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PM Schedules</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Standard WO</td>
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<tr>
<td></td>
<td></td>
<td>• Tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Parts</td>
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<tr>
<td></td>
<td></td>
<td>• All Sales Entities</td>
</tr>
<tr>
<td>Fuel Charges</td>
<td>select to associate charge definition records with invoices for fuel issues from the fuel management system</td>
<td>• Diesel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• All Fuels</td>
</tr>
<tr>
<td>Energy Charges</td>
<td>select to associate charge definition records with invoices for energy usage like electricity or gas</td>
<td>• Commodity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• All Energy Commodities</td>
</tr>
<tr>
<td>Usage Charges</td>
<td>select to associate charge definition records with invoices for usage per period (e.g., monthly rent) or per usage (e.g., miles driven)</td>
<td>Period</td>
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<tr>
<td></td>
<td></td>
<td>• Hourly</td>
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<td>Usage</td>
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<td></td>
<td>miles</td>
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<tr>
<td>One Time Charges</td>
<td>select to associate charge definition records with invoices for one-time costs like contract initiation fees, attorney fees, fuel (rental contract) etc.</td>
<td>Period</td>
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<td>• Hourly</td>
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<td>Usage</td>
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<td>miles</td>
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</tbody>
</table>

**Note:** Subcategories here are at contract start and contract end.

To define charges for customer contracts:

1. Open the **Customer Contracts** form.
2. Select the contract for which to define charges, and then click the **Charge Definitions** tab.
3 Click **Add Record**.

4 **Contract Item**—Enter the contract item for which to define charges. Contract items consist of equipment, projects, or work orders. The system automatically populates the contract item description, and applicable **Work Order, Project**, or **Equipment**, and **Contract Item Org**.

**Note:** Leave **Contract Item** unpopulated to define these charges for all contract items on the header level of the customer contract.

5 **Invoicing Org.**—Enter the invoicing organization on the customer contract header. The system automatically populates **Source Code** with details of where the record originated.

6 **Invoicing Description**—Enter a description of the invoice transaction for the charge defined here. This description is listed on the invoice when it is generated.

7 **Invoice**—Select to include this line of charges defined on the invoice.

**Note:** Use **Invoice** to make exceptions, e.g., invoice all work order charges but not tool costs.

8 **Invoice Conditional**—Specific to charge levels, charge category adjustments and subcategory adjustments. Select to invoice this line if the lower charge level costs add up to more than zero.

9 **Charge Category**—Select the category of the charges defined here for the customer contract to determine the type of charges that will be invoiced. Select one of the charge categories to invoice as follows:
   - **WO Charges**—work order costs
   - **Energy Charges**—energy usage, e.g., electricity, gas
   - **Fuel Charges**—fuel issues from the fuel management system
   - **One Time Charges**—one-time costs, e.g., contract initiation fees, attorney fees, etc.
   - **Sales Transactions**—work order related costs against a fixed sales price
   - **Usage Charges**—usage per period, e.g., monthly rent; or per UOM, e.g., miles driven

10 **Charge Level**—Select the level of invoicing for the charges defined here for the customer contract. Select one of the charge levels to invoice as follows:
   - **Transaction Adjustment**—Select to invoice the customer for the charges defined here on the transaction level, e.g., stocking items or issuing fuel.
   - **Subcategory Adjustment**—Select to invoice the customer for the charges defined here on a group level, e.g., select **Subcategory Adjustment** to add a $50 administration fee when materials are issued from the warehouse, or select **Subcategory Adjustment** to add a 2% tax on all fuel issues.
   - **Charge Category Adjustment**—Select to invoice the customer for the charges defined here on the charge category level, e.g., select **Charge Category Adjustment** to specify that the first $250 of work order costs is included in the rental fee of the space and is therefore free of charge.

11 **Charge Subcategory**—Select the subcategory level of invoicing for the charges defined here for the customer contract. This selection depends on the selection you made for **Charge Category**.

12 **Rate**—Enter the price to use on the invoice for **Energy Charges, Usage Charges**, and **One Time Charges**.

13 **Adjustment % Before**—Enter the percentage by which to adjust the transaction amount prior to price or transaction adjustments are applied.
14 Adjustment Unit Price—Enter the adjustment that should be applied to the transaction price.

15 Adjustment Transaction—Enter the adjustment that should be applied to the transaction.

16 Adjustment % After—Enter the percentage by which to adjust the transaction amount after the Adjustment % Before, price, or transaction adjustments are applied.

17 Minimum Quantity—Enter the minimum quantity to invoice.

   Note: The system compares the transaction quantity with Minimum Quantity and if the transaction quantity is less, the system invoices the minimum quantity.

18 Minimum Charge—Enter the minimum charge value to invoice.

19 Maximum Charge—Enter the maximum charge value to invoice.

20 Free Up To—Enter a monetary amount to designate the amount by which the invoice will be reduced, or the amount that is free of cost. E.g., the first $100 of work order charges are free.

21 Taxable—Select to indicate this transaction line is taxable on the invoice.

22 Tax Code—Enter the tax rate to be applied to the cost of the contract item.

23 Usage UOM—Enter the unit of measure, e.g., miles, kilometers, to which the usage-based rate will be applied.

24 Charge Estimated Usage—Select to add estimates for the usage and energy consumption of the equipment or charge definitions to the periodic invoices.

   The system invoices the customer for actual usage entered via meter readings but when meter readings are not up to date, the system also invoices the estimated usage entered below in Estimated Daily Usage.

25 Rollover—Select to roll over the difference between the actual usage and Minimum Quantity invoiced when actual usage is less than Minimum Quantity.

   Note: The difference is used in future invoices to compensate for over usage. E.g., A customer has a Minimum Quantity of 2000 miles per month. The customer is charged for 2000 miles each month, but perhaps one month the customer uses only 1800 miles. The customer would lose 200 miles because the system uses the Minimum Quantity when generating the customer's invoice.

   Rollover allows the system to roll over the 200 miles into a buffer that can be used in the next invoicing periods if the customer uses more than the 2000 miles in a month.

26 Starting Meter Value—Enter the value of the meter at the beginning of the contract. This is the starting value of the meter for the first invoice.

27 Estimated Daily Usage—Enter the estimated daily usage to charge to the invoice if Charge Estimated Usage was previously selected. The system invoices the customer for estimated daily usage or energy consumption during the invoice generation process when actual usage via meter readings is not known or incomplete.

28 Trade—Enter the trade of the charge definition. This is only relevant for work order charges and if you want to make exceptions for certain trades.

29 Occupation Type—Enter the Occupation Type of the charge definition. This is only relevant for work order charges and if you want to make exceptions for certain trades.

30 Part Class—Enter the part class of the charge definition. This is only relevant for work order charges and if you want to make exceptions for certain part classes.
31 Submetered—Select if the equipment or contract item has its own meter (water meter, gas meter, or electric meter) from which to measure energy consumption.

32 Use Floor Area—Select if the equipment or contract item does not have its own meter and you would like to measure and track energy consumption based on the building utility bill, i.e. Utility Bill Source.

Note: If you select to use the floor area in the calculations, the system calculates the invoicing percentage based on the floor area of the contract item and that of the utility bill source, e.g., typically the building in which the contract item resides.

33 Invoicing Percentage—Enter the percentage of the utility bill or actual submetered consumption to invoice.

34 Utility Bill Source—Enter the utility bill source, usually a piece of equipment, to associate with the contract item. The system automatically populates the utility bill source description and Utility Bill Source Org.

Note: The utility bill source determines the consumption of energy and the rate, if Rate was left blank for this charge definition record.

35 Click Submit.

Note: Click Reset Tax Codes to reset tax codes based on the selected values for the associated contract items.

Click Associate Missing Meters for all contract items where a usage-based charge definition references a meter UOM that does not exist on the equipment, the system add this meter to the equipment.

Click Update Energy Preferences to save the energy settings of all commodities and all equipment referenced on the contract.

Associating adjustments with customer contracts

Associate adjustments to customer contracts when an adjustment to the invoice is necessary after the setup of the initial contract charge definitions. Adjustments may be necessary after a customer complaint, equipment was damaged prior to return, or extra charges are needed.

To associate adjustments with customer contracts:

1 Open the Customer Contracts form.
2 Select the customer contract to which to associate adjustments, and then click the Adjustments tab.
3 Click Add Adjustment.
4 Contract Item—Enter a contract item to which to associate the adjustment. The system automatically populates the contract item description, Contract Item Org., Invoice Amount, and Invoice Tax Amount.
   The system also automatically populates Equipment, Project, or Work Order depending on which is associated to the selected contract item.
Note: If Contract Item is populated, the system invoices the adjustment as part of the contract item costs. If left unpopulated, the system invoices the adjustment on the customer contract header level.

5 Adjustment—Enter the adjustment which to associate with the customer contract or the contract item. Adjustments are defined on the Adjustments form. The system automatically populates Adjustment Org.

6 Quantity—Enter the number of adjustments to apply to the invoice.

7 Tax Code—Enter the tax code to specify for the adjustment, the system calculates the tax amount on the invoice.

8 Adjustment Type—Select to categorize the adjustment.

Note: Invoice Discount or Contract Discount are system types and cannot be manually selected.

9 Date—Select the date to invoice the adjustment.

10 Status—Select the status of the adjustment.

Note: The system selects only Approved adjustments during the invoicing process. Once invoiced the system changes the status to Invoiced and adds the invoice number on the adjustment record for future reference.

11 Comments—Enter any comments applicable to the adjustment.

12 Rate—Enter the rate for the adjustment. The system automatically populates Total Amount.

Note: Total Amount=Quantity * Rate
It is not necessary to enter any values. If Rate is blank the Total Amount is automatically set to 0 (zero). If Quantity is blank the Total Amount is automatically set equal to the entered Rate.

13 Exchange Rate—Enter the exchange rate the system will use for the adjustment when a foreign currency is specified on the invoice of the customer.

Note: The system will try and find the exchange rate for you. If the adjustment date is in the past it will try and find the exchange rate for that day. If it is in the future it will use today’s date. If a contract item is selected and Use Fixed Exchange Rate is selected for the contract item the system will default the exchange rate from the contract item.

14 Click Submit.
To create a work order for the selected adjustment, click Create WO. Select the WO Organization, and then click Submit.

Copying customer contracts
Copy the header details and child records of customer contracts to quickly create a new customer contract.

To copy customer contracts.

1 Open the Customer Contracts form.
2 Select the customer contract to copy, and then click the Record View tab.
3 Right-click on the form, and then select **Copy Contract**.
4 **New Contract Code**—Enter a unique code identifying the new customer contract, and then enter a description of the contract in the adjacent field.
5 **Custom Field Values, Clauses, WO Criteria, Sales Prices, Discounts, Contract Items, Charge Definitions, Commodities, Comments, and Documents**—Select which related details to copy to the new customer contract.
6 Click **Submit**.

**Defining customer rental contracts**

Define a rental contract for a customer to record the rental of equipment for short periods of time, and the charges based on usage fees for a period of time (hours, days, and weeks) and/or for the usage measured in a specific unit of measures (miles, kilometers, and engine hours). The contract can also include fixed charges such as fuel charge or a repair charge to handle any damage that occurs during the rental period.

To create customer rental contracts:
1 Open the **Customer Rentals** form.
2 Click **New Record**.
3 **Organization**—Enter the organization for which the customer rental contract is created, if you use multi-organization security.
4 **Customer Rental**—Enter a unique code identifying the customer rental, and then a description of the customer rental in the adjacent field. The system assigns a customer rental number after you save the record.
5 **Status**—Select a status for the customer rental. Select one of the following statuses:
   - **Unfinished**—The customer contract is editable and has not been approved.
     
     **Note**: When status is **Unfinished**, all the fields are editable except the following:
     - **Customer Rental**
     - **Organization**
     - **Created By**
     - **Date Created**
     - **Completed**
   - **Issued**—Status must be changed to **Issued** when the rental equipment is issued to the customer.
   - **Returned**—Status must be changed from **Issued** to **Returned** when the customer returns the rental equipment.
   - **Completed**—Status must be changed from **Returned** to **Completed** when the rental contract is completed.
Note: System automatically updates the status from Completed to Finished based on the Rental Completed date and CCFIDAYS install parameter defined on Options tab of Organization

- **Cancelled**—Select if the contract no longer impacts customer rentals.

6 **Rental Type**—Enter the rental type for the customer rental.

   **Note:** If the user selects Loaner option, Received Equipment is enabled. If the user selects Pool, Received Equipment is protected.

7 **Equipment**—Enter the equipment for which the customer rental is applicable.

8 **Received Equipment**—Enter details of the equipment received.

   **Note:** The equipment selected for the Rental Type is the equipment being loaned while the received equipment is under repair. This field is enabled only when the Rental Type is set to Loaner.

9 **Rental Template**—Enter the template to apply to the customer rental contract. The system automatically populates Rental Template Org., Class, and Class Org.

10 **Class**—Enter the class of the customer rental.

11 **Issue To**—Enter customer receiving the equipment for the rental.

12 **Customer**—Enter the unique code identifying the customer.

13 **Customer Contact**—Enter the customer contact name.

14 Enter the customer Work Phone Number and Email Address.

15 **Email Invoice**—Select to e-mail the customer rental invoice to the customer.

16 Enter the Driver’s License No., Cost Code, and Tax Code.

17 Enter Issue Date/Time, Issue Location, Issue Reading, and Issue Fuel Level details of the rental equipment.

18 Enter Return Date/Time, Return Location, Return Reading, and Return Fuel Level details of the rental equipment.

19 Enter Corrected Hours, Corrected Days, Corrected Usage, and Corrected Fuel Usage, if the calculated values must be overwritten.

   **Note:** The system populates the values for the invoicing details such as Calculated Hours, Calculated Fuel Usage, Net Amount, Tax Amount, and Gross Amount.

20 Click **Save Record**. The system generates the Customer Rental number.

   **Note:** The system also populates all charge definitions linked to the Rental Template.

   To generate an invoice, right-click on the screen, and then select **Generate Invoice**.

ASSOCIATING ADJUSTMENTS WITH CUSTOMER RENTAL CONTRACTS

Associate adjustments with customer rentals. An adjustment can be an extra charge or a discount such as extra charges for a damaged vehicle or a late return fee on the equipment. The user can also create work orders from this screen.

Create a work order for an adjustment on this screen.
To associate adjustments with customer rental contracts:

1. Open the **Customer Rentals** form.
2. Select the customer rental for which to create an adjustment, and then click the **Adjustments** tab.
3. Click **Add Adjustment**.
4. **Adjustment**—Enter the adjustment with which to associate to the customer rental. The system automatically populates **Adjustment Org.**, **Date**, and **Status**.
5. **Tax Code**—Enter the tax code for the adjustment.
6. **Date**—Enter the date to invoice the adjustment.
7. **Quantity**—Enter the quantity of adjustments to invoice.
8. **Adjustment Type**—Select the type of adjustment, e.g., enter an extra charge for damage if the equipment was returned damaged or a discount because it was returned early. You cannot select **Invoice Discount** or select **Contract Discount** because they are reserved by the system.
9. **Status**—Select the status of the adjustment. Select one of the following statuses:
   - **Unfinished**—Adjustments can be changed.
   - **Approved**—Adjustment is ready for invoicing.
   - **Invoiced**—Adjustment is invoiced.
   - **Cancelled**—Adjustment is cancelled.
10. **Rate**—Enter the rate for the adjustment. The system automatically populates **Total Amount**, and **Tax Amount** which is applied to the invoice when the adjustment is due, based on the adjustment date selected.
11. 12. Click **Submit**.
   - The system automatically populates **Invoice** and **Invoice Org.** when the invoice process is completed. **Created Work Order** is automatically populated when a work order is created for the adjustment.
   - **Note**: To create a work order for the adjustment, click **Create WO**. See "Creating regular work orders" on page 388.

Viewing charge definitions for customer rental contracts

View charge definitions for the customer rental equipment.

To view charge definitions for customer rental contracts:

1. Open the **Customer Rental** form.
2. Enter the customer rental for which to view charges, and then click the **Charge Definitions** tab.
3. View the charge definitions details.
Viewing customer invoices

View and modify customer invoices on this screen. The **Customer Invoices** page displays details of the invoices created for customer contracts and customer rentals.

**Note:** Customer invoices can only be generated by the system. You cannot manually insert or delete invoices on this screen, but you can modify customer invoices.

To view and modify customer invoices:

1. Open the **Customer Invoices** form.
2. Select the customer invoice for which to modify or view, and then click the **Record View** tab.
3. **Description**—Enter the description of the invoice.
4. **Status**—Select the status of the invoice. To approve the invoice, select **Approved**.
5. Click **Save**.
   The system automatically populates **Approval Date**.

Viewing contract items for customer invoices

View details of the equipment, projects, or work orders linked to the customer invoice. View contract items details such as the invoicing organization, applicable exchange rate, and customer data.

To view the contract items:

1. Open the **Customer Invoices** form.
2. Select the invoice for which to view contract items, and then click the **Contract Items** tab.
3. **Adjusted Net**—If required, modify the net amount. The adjusted net amount is displayed on the Invoice header.

Viewing and modifying customer invoice details

View details of a customer invoice by charge categories, charge subcategories and charge levels.

To view and modify customer invoices:

1. Open the **Customer Invoices** form.
2. Select the customer invoice for which to view or modify details, and then click the **Invoice Details** tab.
3. View details of the customer invoice.

**Note:** Only **Adjusted Quantity**, **Adjusted Periods**, **Adjusted Price** and **Adjusted Rollup** can be modified. The adjustments are displayed on the Contract Items tab and the Invoice header.
Viewing invoice generation errors

View the error details generated during the customer invoicing process.

To view invoice generation errors:

1. Open the **Customer Invoices** form.
2. Select the customer invoice for which to view generation errors, and then click the **Generation Errors** tab.
3. View the errors.

Viewing unreturned core parts

View and track core parts issued to a work order, equipment, project-budget or employee for which a corresponding core was never returned to the store after failing. When core parts remain outstanding, the value of the core part remains charged against the work order, or to whatever it was issued. Once the core part is returned the core value is removed from the work order.

**Note:** The total value of cores which remain unreturned for a work order can be seen on the **Cost Summary** page of the **Work Orders** form.

To view unreturned core parts:

1. Open the **Unreturned Cores** form.
2. View the unreturned core parts.

Managing permits to work

Create and promote a safe work environment for your employees by defining permits to work. The permit to work details the hazards and precautions required to remove or prevent a potential hazard to your employee’s safety.

An efficient permit to work includes:

- Details of potential hazards
- Details of the precautions to take to prevent potential hazards
- Any required lockout/tagout operations

Defining permit to work setup

Define permit to work setup options to format the maximum initial duration, maximum number of extensions, and the maximum extension duration of a permit to work.
To define permit to work setup:

1. Open the **Permit to Work Setup** form.
2. **Organization**—Enter the organization of the permit to work. The system automatically populates the description of the organization.
3. **Risk**—Select the color indicating the potential risk the work poses to your operation, e.g., select **Red** if the hazard poses a significant risk to your operation.
   
   **Note:** The selection of colors is contingent upon your organization's preferences or the value your organization assigns for each color. The system does not assign value to the colors available.
4. **Maximum Initial Duration (Hrs.)**—Enter the maximum number in hours to indicate the initial duration period expected for the permit to work.
5. **Maximum Extensions**—Enter the maximum number of extensions to allow for the permit to work in the event the work to be performed is not completed by the **Maximum Initial Duration (Hrs.)**.
6. **Maximum Extension Duration (Hrs.)**—Enter the maximum number of hours to allow per extension for the duration of the permit to work in the event the work to be performed is not completed by the **Maximum Initial Duration (Hrs.)**.
7. **Maximum Total Duration (Hrs.)**—Enter the maximum number in hours to indicate the total duration allowed for the permit to work.
8. **Click** **Save Record**.

**Defining hazards**

A hazard is a situation that poses a level of threat to life, health, property, or the employee's environment such as working with fire and flammable equipment, lifting heavy objects, handling sharp objects, working near roadsides, working at heights, or working in confined spaces. Define these situations as hazards to notify your employees of potential dangers in the workplace as they perform maintenance.

After defining hazards, define precautionary measures for each hazard on the **Precautions** form.

To update or revise hazard records once created, right-click on a hazard record, and then select **Create New Revision**.

To define hazards:

1. Open the **Hazards** form.
2. **Organization**—Enter the organization of the hazard.
3. **Hazard**—Enter a unique code identifying the hazard, and then enter a description in the adjacent field. Alternately, you may opt to allow the system to automatically generate **Hazard**.
4. Enter the **Status** and **Class** of the hazard. The system automatically populates **Class Org**.
5. **Hazard Type**—Select the type to classify the hazard. For example, select **Biological Hazards**, **Chemical Hazards**, **Physical Hazards**, or **Radiological Hazards**.
6. **Date Review Required**—Enter the date by which to review the hazard.
7. **Out of Service**—Select to indicate that the hazard should not display in lookups on the **Safety** pages.
8 Click **Save Record**. The system automatically populates **Created By** and **Date Created**.

**Note:** After updates to the hazard record are saved, the system automatically populates **Updated By**, **Date Updated**, and **Revision**.

**Associating precautions with hazards**

Associate precautions with hazards to prevent hazardous situations in the workplace that can potentially cause bodily harm or injury to your employees. For example, workers completing a job on the roof of a building are at risk of falling off the roof. Wearing a safety harness is a precaution the workers can take to protect them from a potential fall off the roof.

To associate precautions with hazards:

1. Open the **Hazards** form.
2. Select the hazard for which to associate precautions, and then click the **Precautions** tab.
3. Click **Add Precaution**.
4. **Precaution**—Enter the safety measure to protect the workers from the hazard. The system automatically populates the precaution description and the **Precaution Org**.
5. **Sequence**—Enter the sequence in the workflow process at which the precaution should be taken to prevent the hazard if more than one precaution is in effect and you want to prioritize.
6. Click **Submit**.

**Viewing hazard usage**

The **Where Used** page of the **Hazards** form lists the screens on which hazards are being used throughout the system. Hazards can be attached to PM schedules, work orders, parts, equipment, categories, permits to work, and standard work orders on the **Safety** tab.

To view hazard usage:

1. Open the **Hazards** form.
2. Select the hazard for which to view usage, and then click the **Where Used** tab.
3. View the hazard usage information.

**Defining precautions**

Define precautions to safeguard workers from potential hazards in the workplace such as working with fire and flammable equipment, lifting heavy objects, handling sharp objects, working near roadsides, or working at heights.

Precautions for these potential hazards include wearing harnesses or using scaffolds to prevent falls, wearing gloves for handling sharp objects, or working during low traffic volume times when working on or near roadsides.
After creating precautions, associate the precautions with hazards on the **Precautions** tab of the **Hazards** form or immediately associate hazards and precautions on the **Safety** tabs.

To update or revise precaution records once created, right-click and then select **Create New Revision**.

To define precautions:

1. Open the **Precautions** form.
2. Click **New Record**.
3. **Organization**—Enter the organization of the precaution.
4. **Precaution**—Enter a unique code identifying the precaution, and then enter a description in the adjacent field. Alternately, you may opt to allow the system to automatically generate **Precaution**.
5. Enter the **Status** and **Class** of the precaution. The system automatically populates **Class Org.**.
6. **Timing**—Select the best time to observe the precaution to prevent the hazard. For example, select **Pre Work** if workers should observe the precaution prior to performing work.
7. **Date Review Required**—Enter the date on which the precaution should be reviewed.
8. **Out of Service**—Select to indicate the precaution should not display in the Precautions lookup on the **Safety** page.
9. Click **Save Record**. The system automatically populates **Created By** and **Date Created**.

**Note:** After updates to the precaution record are saved, the system automatically populates **Updated By** and **Dated Updated**.

### Defining isolation points for equipment

Define isolation points for equipment to later isolate the equipment from its energy sources during a lockout/tagout procedure as part of a permit to work process. Isolating equipment from its energy sources helps to prevent further injury that may occur if the equipment or machinery is unexpectedly energized or starts up while maintenance or service work is being performed on the equipment by employees.

For example, if crews are performing maintenance on a machine, lockout/tagout safety procedures are observed which may involve isolating the machine from its power source by shutting off the power and placing a lock on the circuit breakers.

By defining isolation points, you indicate at which areas the equipment can be isolated from its energy sources to prevent injury from unexpected startup.

To define isolation points for equipment:

1. Open the **Isolation Points** form.
2. Click **New Record**.
3. **Organization**—Enter the organization of the isolation points.
4. **Isolation Point**—Enter a unique code identifying the isolation point, and then enter a description in the adjacent field.

   **Note:** If you leave **Isolation Point** blank, the system generates a code for you.
5 **Equipment**—Enter the equipment if the isolation point is equipment that you already maintain, e.g., a valve. The system automatically populates the description and **Equipment Org.**

6 **Class**—Enter the class of the isolation point, e.g. **VALVE, SWITCH**. The system automatically populates **Class Org.**

7 **Status**—Enter the status of the isolation point. The system automatically populates **Unfinished**.

8 **Location**—Enter the location of the isolation point. The system automatically populates **Location Org.**

9 **Location Note**—Enter any additional notes on the location of the isolation as necessary.

10 **Energy Source**—Select the equipment's source of energy, e.g., electrical power.

11 **Residual Energy**—Select the secondary source of residual energy to the equipment if any.

12 **Secondary Residual Energy**—Select the secondary source of residual energy to the equipment.

13 **Date Review Required**—Enter the date review of the isolation point is required.

14 **Out of Service**—Select to indicate the isolation point should not display in the isolation point lookups on the **LOTO** tab of the **Assets, Positions, Locations**, and **Permit to Work** form.

15 Click **Save Record**. The system automatically populates **Created By** and **Date Created**.

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**Viewing permits to work for isolation points**

This screen displays the permit to work data attached to specific isolation points.

To view permits to work for isolation points:

1 Open the **Isolation Points** form.
2 Select the isolation point for which to view permits to work, and then click the **Permit to Work** tab.
3 View the information.

---

**Defining lockout boxes for lockout/tagout procedures**

Define lockout boxes for employees to safely store all the keys used for a lockout/tagout procedure. Lockout/tagout procedures are observed during the maintenance required for a permit to work.

Tagging and locking out (e.g., securing that mechanical equipment is disconnected from to electricity) while employees are performing required maintenance and work orders, prevents bodily injury and death by employees who might otherwise startup equipment while maintenance is being performed.

To define lockout boxes for permits:

1 Open the **Lockout Boxes** form.
2 Click **New Record**.
3 **Organization**—Enter the organization of the lockout box.
4 **Lockout Box**—Enter a unique code identifying the lockout box, and then enter a description in the adjacent field.
5 Class—Enter the class of the lockout box for the permit. The system automatically populates Class Org.
6 Location Note—Enter a note detailing where the lockout box is located.
7 In Use—Select if the lockout box is currently in use.
8 Out of Service—Select if the lockout box is currently out of service or not being used.
9 Click Save Record.

Note: The system automatically populates Current PTW and In Use if the lockout box is used on a permit to work that is currently isolated.

Defining permits to work

To define permits to work:

1 Open the Permit to Work form.
2 Enter the Organization.
3 Enter a description of the permit to work.
4 Equipment—Enter the equipment associated with the permit to work. The system automatically populates the description of the equipment and Equipment Org.
5 PTW Type—Select the type of work to be performed on the permit, e.g., Confined space entry if the work to be performed must be completed in an enclosed space.
6 Department—Enter the department of the equipment.
7 Status—Enter the status of the permit to work.
8 Location—Enter the location of the equipment. The system automatically populates Location Org.
9 Location Note—Enter a note on the location of the equipment.
10 Class—Enter the class for the permit to work. The system automatically populates Class Org.
11 Type of Work—Select the type of work to be performed on the permit to work.
12 Priority—Select the priority of the work to be performed on the permit to work.
13 Risk—Select the risk the permit to work poses to your organization.
14 Lockout Box—Enter the lockout box that will be used if a lockout is required.
15 Un-assessed Conflicts—Select to indicate if the potential conflicts with other permits to work have been un-assessed.
16 Requested By—Enter the person who requested the permit to work.
17 Date Requested—Enter the date the permit to work was requested.
18 Isolated—Select to indicate that the equipment has been isolated or disconnected from its energy source in order that work can be performed without risk or injury.
19 Date Required—Enter the date the permit to work will go in effect.
20 Duration (Hrs.)—Enter the duration in hours required for the permit to work.
21 Extension (Hrs.)—Enter the number of hours to extend the permit to work if maximum duration hours are exceeded. The system automatically populates Duration Total. The system automatically populates Valid Until and Extension Count when the permit to work Status is Active.
22 **Suspension Reason**—Enter the reason to suspend the permit to work.

23 Click **Save Record**. The system automatically populates **Permit to Work**, **Created By**, **Date Created**, **Updated By**, and **Date Updated**.

    **Note:** To extend the amount of time that the permit to work is valid, click **Extend**. Enter your electronic signature information, and a new **Extension Count**, **Duration Total**, and **Valid Until** will be determined.

To indicate that the equipment is isolated from its energy source so that work can be performed without risk or injury to employees performing the work, click **Isolated**. This will also flag the associated isolation points.

To indicate the equipment is on-line and reattached to its energy source after work has been performed, click **De-Isolated**. This will also reset the isolation flag for the associated isolation points.

To sign off on the permit to work, click **Sign-Off**.

To make a copy of an existing permit to work or to replace a permit to work if it can no longer be used, click **Copy/Replace**. See "Copying and replacing permits to work" on page 552

To view all differences between the current data of the permit to work and the archived data from the last electronic signature, click **Unsigned PTW Differences**. View the differences.

### Adding safety hazards and precautions to permits to work

Add hazards to permits to work to alert your employees to the dangers (bodily harm, environmental issues like spills) they face when performing required maintenance and working with equipment. Attach precautions to these hazards so they can safeguard themselves and their surroundings from these potential dangers. For example, if you must maintain electrical equipment, electrocution is a hazard. Add a precaution to turn off and remove it from the power outlet before performing repairs on that electrical equipment.

To add safety hazards and precautions to permits to work:

1. Open the **Permit to Work** form.
2. Select the permit to work for which to add safety precautions and hazards, and then click the **Safety** tab.
3. Click **Add Safety Record**.
4. **Hazard**—Enter the hazard to add to the permit to work. The system automatically populates the hazard description, **Hazard Org.**, **Hazard Revision**, and **Hazard Type**.
5. **Precaution**—Enter the safety measure to protect your employees from the hazard. The system automatically populates the precaution description, **Precaution Org.**, and **Precaution Revision**. Add one or more precautions to a hazard as needed.
6. **Timing**—Select the timing which is used to identify when the precaution should be taken. For example, if your employee is working with fire, you can enter the timing of "during" to alert the employee that they should wear fire-resistant clothing during the task.
7. **Sequence**—Enter the sequence number which is used to identify the order in which your employee should be made aware of the precaution. All precautions are important regardless of the sequence number entered.
8 **Health Hazard**—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates the degree to which the materials used poses a hazard to the health of the employee.

9 **Flammability**—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates the degree to which the materials used are flammable.

10 **Instability**—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates the degree to which the materials used can detonate or explode.

11 **Special Hazards**—Enter the code based on the Hazardous Materials Code (400) of the NFPA that indicates any special hazards related to the materials used.

12 Click **Submit**. The system automatically populates **Created By** and **Date Created**.

---

**Implementing lockout/tagout procedures for permits to work**

Define the steps that must be taken on the permit to work to isolate equipment from its energy sources to prevent startup of a piece of equipment or machine once maintenance on that equipment is in progress. This is to prevent dangers to the workers.

To implement lockout/tagout procedures for permits to work:

1 Open the **Permits to Work** form.
2 Select the permit to work for which to implement lockout/tagout procedures, and then click the **LOTO** tab.
3 Click **Add LOTO Record**.
4 **Sequence**—Enter the sequence in which to implement lockout/tagout procedures.
5 **Isolation Point**—Enter the point at which to isolate the equipment from its energy source. The system automatically populates the description, **Isolation Point Org.**, **Isolation Point Revision**, **Equipment** and **Equipment Org.**
6 **Isolation Method**—Enter the method by which to isolate the equipment from its energy source. The system automatically populates **Method Revision**, **Location**, and **Location Org.**
7 **Location Note**—Enter any additional notes on the location of the equipment as necessary.
8 **Number of Tags**—Enter the number of tags required to properly lock and tag the equipment so that startup of the equipment is prevented.
9 **Energy Source**—Select the equipment’s source of energy, e.g., electrical power.
10 **Residual Energy**—Select the secondary source of residual energy to the equipment if any.
11 **Secondary Residual Energy**—Select the secondary source that stores residual energy for the equipment. This source supplies energy to the equipment when the equipment is disconnected from its primary energy and secondary energy sources.
12 **Isolation Step**—Select to indicate this procedure is an isolation step and not a de-isolation step.
13 **Note**—Enter any notes regarding the lockout/tagout step for this permit to work.
14 **Key References**—Enter any references to keys used during the lockout.
15 Click **Submit**.
Viewing and entering checklist items for permits to work

View a checklist for a permit to work LOTO sequence to verify the progress or completion of the checklist. Alternately you may enter results for a checklist of a permit to work LOTO sequence. To enter results for checklist items associated to the permit to work, the permit to work must not have a status equal to Closed or Cancelled.

To view and enter checklist items for permits to work:

1. Open the Permit to Work form.
2. Select the permit to work for which to enter checklist items, and then click the Checklist tab.
3. LOTO Sequence—Select the sequence of the step of the lockout/tagout procedure during which to enter the checklist answers. The system automatically populates the isolation method description.
4. Enter results of the checklist based on the checklist item.
   • Select Completed if Type is Checklist Item.
   • Select Yes or No if Type is Question.
   • Enter Finding if Type is Qualitative.
   • Enter Value and UOM if Type is Quantitative.
   • Notes—Enter any relevant notes for the checklist item results.
   • Final Occ.—Select if the results entered represent the final occurrence of the specific checklist item. This applies only to repeating checklist items, e.g., a gas measurement you must perform more than once.
5. Click Submit.

Resolving conflicts with permits to work

Conflicts with permits to work can occur when multiple permits to work are attached to the same equipment or have the same isolation points or location. Identify potential conflicts and choose the method by which to resolve the conflicts.

To resolve conflicts with permits to work:

1. Open the Permit to Work form.
2. Select the permit to work for which to resolve conflicts, and then click the Conflicts tab.
3. Click Add Record.
4. Conflicting PTW—Enter the permit to work with the conflict. The system automatically populates the description, Organization, Status, PTW Type, Risk, Equipment, Equipment Org., equipment description, Location, Location Org., Responsible,Holder, Un-Assessed Conflicts, Date Required, Valid Until, Created By, Date Created, Updated By, and Date Updated.
5. Resolution—Select the method for resolving the conflict with the conflicting permit to work.
6. Click Submit.
Viewing event logs for permits to work

View status changes, extensions, isolation, de-isolation and sign-off events that occurred during the life cycle of the permit to work. Alternately you may manually add events or remarks.

To view event logs for permits to work:

1. Open the Permit to Work form.
2. Select the permit to work for which to view event logs, and then click the Event Log tab.
3. **EventType**—Select the events type to view for the permit to work. For example, select Status Change to view the events in which the status for the permit to work was changed. The system automatically populates User, and User Name.

   **Note:** To manually add an event to the log, click Add Event. Select the Event Type, and then enter Date/Time the event occurred.

4. **Date/Time**—Enter the date and time the event occurred.
5. **Notes**—Enter notes as necessary.
6. Click Submit. The system automatically populates Created By and Date Created.

   **Note:** The system automatically populates Updated By and Date Updated if updates were made the event log.

Copying and replacing permits to work

Replace an existing permit to work with a new permit to work, or copy an existing permit to work to save planning time for a new permit to work.

To copy and replace permits to work:

1. Open the Permit to Work form.
2. Select the permit to work to copy or replace.
3. Right-click on the form, and then select Copy/Replace PTW.
4. **Description**—Enter a description of the new permit to work.
5. **Equipment**—Enter the equipment to associate to the new permit to work. The system automatically populates a description of the equipment and Equipment Org.
6. **Location**—Enter the location of the equipment associated to the new permit to work. The system automatically populates a description of the location, and Location Org.
7. **Custom Field Values**—Select to copy all associated custom field values to the new permit to work.
8. **Comments**—Select to copy all associated comments to the new permit to work.
9. **Documents**—Select to copy all associated documents to the new permit to work.
10. **LOTO**—Select to copy all associated lockout/tagout records to the new permit to work.
11. **Safety**—Select to copy all associated safety records to the new permit to work.
12. **Add Equipment Safety**—Select to add all associated equipment safety records to the new permit to work.
13 Add Location Safety—Select to add all associated location safety records to the new permit to work.

14 Click Copy or Replace.
Work management
The inspection management module coordinates with the work management module to give you more control over preventive maintenance (PM) functions within your organization.

Set up PM routes in the work management module, and then enhance the PM route information in the inspection management module by adding inspection points, inspection methods, and inspection conditions.

First, enter the inspection information, and then establish high and low tolerances for inspection readings. When a reading result exceeds the high or low tolerance, the system automatically generates a corrective work order. The Infor EAM inspection process will lower your organization’s maintenance costs and ensure asset reliability.

### Inspection management terms

The following terms will help you become familiar with the inspection management module’s unique attributes:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspection Point</td>
<td>The physical location on the piece of equipment to inspect</td>
</tr>
<tr>
<td></td>
<td><strong>Example</strong>: Examine the tires on a van every three months for tread wear. The inspection points are the front left tire, the front right tire, the rear left tire, and the rear right tire. Also, define inspection points at the category level so that the points apply to all equipment within the specified category. <strong>Example</strong>: Define inspection points for all vans rather than for a specific van.</td>
</tr>
<tr>
<td>Inspection Point Type</td>
<td>Groups of similar inspection points</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Inspection Term</td>
<td><strong>Definition:</strong> Inspection point types for a vehicle are tires, brakes, headlights, etc. For a pipe, the point type could be a tee or weld.</td>
</tr>
<tr>
<td>Inspection Aspect</td>
<td>The item(s) measured during an inspection. An inspection point can have multiple inspection aspects.</td>
</tr>
<tr>
<td>Time Dependence</td>
<td>Indication of the trend for the inspection aspect over a period of time. The dependence can be either linearly increasing or linearly decreasing.</td>
</tr>
<tr>
<td>Inspection Point Conditions</td>
<td>Restrictions on inspecting a piece of equipment</td>
</tr>
<tr>
<td>Inspection Unit</td>
<td>The unit of measure for the inspection</td>
</tr>
<tr>
<td>Inspection Method</td>
<td>The detailed description of how to carry out the inspection</td>
</tr>
<tr>
<td>Nominal Value</td>
<td>A standard against which to measure aspects</td>
</tr>
<tr>
<td>Extreme Value</td>
<td>Either a minimum or maximum value that defines the range of acceptable inspection readings</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>The minimum extreme value for tire tread is 1/32. The maximum value is 9/32. Tire tread measurements between these two values are acceptable.</td>
</tr>
<tr>
<td><strong>Critical Value</strong></td>
<td>The value that indicates when to take action for an aspect</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>When tire tread reaches 2/32 of an inch, replace the tire.</td>
</tr>
<tr>
<td><strong>Tolerance</strong></td>
<td>The percentage amount above or below the critical value. The tolerance defines the safety limits, which are the values that signal the need for a new inspection.</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>A tolerance of 5 percent is set for tire tread. If a measurement is 5 percent above or below 2/32 of an inch (the critical value), initiate a new inspection.</td>
</tr>
<tr>
<td><strong>Inspection Route Template</strong></td>
<td>A sorted list of inspection points defined for a category (not a specific piece of equipment), outlining both the sequence and the content of an inspection.</td>
</tr>
<tr>
<td></td>
<td>Apply the template to any piece of equipment in a category. The system stores the template in the database library and attaches it to a work order when you need it.</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>Set up a route template for 12,000, 36,000, and 60,000-mile tune-ups for vehicles. When it is time to perform the tune-up, attach the tune-up template to a work order for a 1991 Ford Passenger Van.</td>
</tr>
<tr>
<td><strong>Inspection Route for Work Order</strong></td>
<td>An aspect-specific subset of an inspection route template that can associate a route with a specific work order</td>
</tr>
<tr>
<td><strong>Route Status</strong></td>
<td>The status of an inspection route changes as the inspection moves through its lifecycle. This list describes the status codes.</td>
</tr>
<tr>
<td><strong>Blank (no status)</strong></td>
<td>Add or remove inspection aspects and points.</td>
</tr>
<tr>
<td><strong>Unfinished</strong></td>
<td>Enter the results of the inspection.</td>
</tr>
<tr>
<td><strong>Ready</strong></td>
<td>All results are entered in the system, and you can process the results. At this point, you cannot make any changes to the results.</td>
</tr>
</tbody>
</table>
### Term | Definition
--- | ---
**Request Approval** | Update the inspection point result type only.
**Approved/Processed** | The results are frozen, and you can update the inspection point result type only.
**Canceled** | User cannot make any changes, and the route is considered "dead."

### Finding Code
Defines observations or measurements that you can only report qualitatively

**Example:** It is difficult to gauge water color (clear, hazy, swampy). In this situation, set up finding codes for clear, hazy, and swampy.

### Result Type
Indicates the validity of an inspection reading or result

**Example:** When a finding is "Valid," include the value in system calculations. When a finding is "Invalid," do not include the value in calculations. When a finding indicates discontinuity, take a new reading.

---

### Defining inspection codes
Define inspection codes before defining inspection parameters.

### Defining inspection aspects
Define codes to represent specific aspects to measure. Measure one or multiple aspects against standards or gauges.

Although you can define additional time dependence codes on the Installation Parameters form, the system only uses the linearly increasing or decreasing codes for internal calculations.

You cannot delete inspection aspect codes after associating them with inspection points.

To define inspection aspects:

1. Open the Aspects form.
2. Click New Record.
3 **Aspect**—Enter a unique code identifying the inspection aspect, and then enter a description of the aspect in the adjacent field.

4 **Time Dependency**—Select **Linearly Increasing** or **Linearly Decreasing**. The time dependence parameter is used to calculate when equipment will exceed safety margins.

5 **Class**—Enter the class of the aspect. The system automatically populates **Class Org**.

6 **Out of Service**—Select to indicate that the system does not use this aspect.

7 **Random Result**—Select to permit entry of measurements without requiring an associated inspection point.

8 Click **Save Record**.

---

**Defining inspection point types**

Inspection point types are groups of similar inspection points. Associating inspection points with point types simplifies data entry and analysis by standardizing descriptions.

**Note:** You cannot delete inspection point type codes after associating them with inspection points.

To define inspection point types:

1 Open the **Point Types** form.
2 Click **New Record**.
3 **Point Type**—Enter a unique code identifying the inspection point type, and then enter a description of the point type in the adjacent field.
4 **Class**—Enter the class of the inspection point type. The system automatically populates **Class Org**.
5 Click **Save Record**.

---

**Defining inspection methods**

Inspections involve procedures or methods. With this feature, define the method of inspecting a particular aspect of a piece of equipment.

**Note:** You cannot delete inspection method codes after associating them with inspection points or inspection aspects.

To define inspection methods:

1 Open the **Methods** form.
2 Click **New Record**.
3 **Method**—Enter a unique code identifying the inspection method, and then enter a description of the method in the adjacent field.
4 **Class**—Enter the class of the inspection method. The system automatically populates **Class Org**.
5 Click **Save Record**.
Defining inspection conditions

Inspection conditions are restrictions on inspections. The conditions differ with different equipment. For example, check the brake system of a vehicle only when it is stationary with the wheels removed. For other equipment, the weather or the temperature might restrict an inspection.

The system includes, on the work order printout, any conditions that must be met prior to the inspection.

To define inspection conditions:

1. Open the **Conditions** form.
2. Click **New Record**.
3. **Condition**—Enter a unique code identifying the inspection condition, and then enter a description of the condition in the adjacent field.
4. **Class**—Enter the class of the inspection condition. The system automatically populates **Class Org**.
5. Click **Save Record**.

Defining inspection findings

Define codes that represent the results of an inspection. All of the codes defined on this form represent qualitative findings, not quantitative results. For example, a qualitative finding of a pipe inspection is "The pipe is leaking."

Associate one or more equipment classes with a specific inspection finding. For example, associate tire tread wear results with vehicle classes (four door sedans, two door sedans, vans, etc.).

**Note:** You cannot delete inspection findings codes after associating them with classes or inspection results.

To define inspection findings:

1. Open the **Findings** form.
2. Click **New Record**.
3. **Finding**—Enter a unique code identifying the inspection finding, and then enter a description of the finding in the adjacent field.
4. **General**—Select to associate the finding with all equipment inspections. Unselect to associate specific equipment classes with the finding on the **Classes** page of the **Findings** form. In this situation, the system displays the finding in the list of values for the relevant equipment.

   **Note:** You cannot select **General** if the finding is associated with one or more equipment classes.
5. Click **Save Record**.
Assigning equipment classes to findings

Assign equipment classes to a finding on the Classes page. The Classes page displays a list of equipment classes assigned to a particular finding. A finding may have multiple equipment class assignments, if it is not a General finding, which by default applies to all equipment classes.

For example, equipment with a class of HVAC may have different findings than equipment with a class of MOTOR. When you enter inspection results for a piece of equipment with a class of HVAC, only the General findings and those assigned specifically to the HVAC class will appear in Finding on any inspection result entry form.

**Note:** You cannot assign classes to a General finding.

To assign equipment classes to findings:

1. Open the Findings form.
2. Select the finding to which to assign an equipment class, and then click the Classes tab.
3. Click Add Class.
4. **Class**—Enter the equipment class to which to assign the finding. The system automatically populates **Class Org**.
5. Click Submit.

Viewing monitored data

View equipment, locations, categories, and profiles for inspection-related details.

To view monitored data:

1. Open the Monitored Equipment form.
2. View the monitored data information.

Defining points

Define equipment inspection points, equipment inspection aspects, equipment inspection aspect points, and equipment inspection conditions. Finally, enter additional equipment inspection information and record equipment inspection results.
Defining equipment inspection points

Associate inspection points with specific equipment or categories. For example, when examining the tread wear on tires of a van, the equipment is the van, and the inspection points are the four tires. You can also associate inspection points with categories.

To define equipment inspection points:

1. Open the Monitored Equipment form.
2. Select the equipment, profile, or equipment category for which to define inspection points, and then click the Points tab.
3. Click Add Point. The system automatically populates Origin.
4. **Point Type**—Enter the inspection type to associate with the equipment or equipment category. The system automatically populates the point type description.
5. **Point**—Enter the inspection point number.
6. Click Submit.

**Note:** You cannot remove point records that are indirectly associated with the monitored data object.

Defining equipment inspection aspects

Associate aspects with equipment or categories. For example, specify a category of vans or a particular van, and then associate it with the inspection aspect of measuring tire tread.

To define equipment inspection aspects:

1. Open the Monitored Equipment form.
2. Select the equipment, equipment class, or equipment category for which to enter inspection aspect information, and then click the Aspects tab.
3. Click Add Aspect. The system automatically populates Origin.
4. **Aspect**—Enter the inspection aspect with which to associate the monitored data object. The system automatically populates the aspect description.
5. **Method**—Enter the inspection method for the aspect as necessary.
6. **Nominal Value**—Enter the starting value or normal value and unit of measure for measurements on this aspect. For example, if a new pipe's wall thickness is 3 mm, the nominal value is 3 and the unit of measure is mm.
7. **Min. Extreme**—Enter the minimum extreme value beyond the operating specifications for the aspect.
8. **Min. Critical**—Enter the lowest possible value for the aspect.
9. **Min. Tolerance**—Enter the minimum percentage of critical value for the aspect.
10. **Min. Std. WO**—Enter a standard work order to restore normal operating conditions when the minimum critical value is reached.
11. **Min. PM**—Enter a preventive maintenance work order to restore normal operating conditions when the minimum critical value is reached.
12 **Max. Extreme**—Enter the maximum extreme value beyond the operating specifications for the aspect.

13 **Max. Critical**—Enter the highest possible value for the aspect.

14 **Max. Tolerance**—Enter the maximum percentage of critical value for the aspect.

15 **Max. Std. WO**—Enter a standard work order to restore normal operating conditions when the maximum critical value is reached.

16 **Max. PM**—Enter a preventive maintenance work order to restore normal operating conditions when the maximum critical value is reached.

17 Click **Submit**.

   **Note:** You cannot remove aspect records that are indirectly associated with the monitored data object.

---

### Defining equipment inspection aspect points

Define minimum and maximum measurement values for the equipment. When inspection aspect measurements exceed acceptable values, the system automatically generates work orders to correct the problems. Inspection aspect point information is similar to the information on the **Aspect** page but is specific for an aspect/point combination.

To define equipment inspection aspect points:

1. Open the **Monitored Equipment** form.
2. Select the equipment, equipment class, or equipment category for which to enter aspect point information, and then click the **Aspect Points** tab.
3. Click **Add Aspect Point**. The system automatically populates **Origin**, **Date**, and **Finding**.
5. **Point**—Enter the point with which to associate the aspect point. The system automatically populates the point description, **Point Type**, and the point type description.
6. **Point Type**—Enter the point type with which to associate the aspect point. The system automatically populates the point type description.
7. **Method**—Enter the inspection method for the aspect as necessary.
8. **Nominal Value**—Enter the starting value or normal value and unit of measure for measurements on this aspect point. For example, if a new pipe's wall thickness is 3 mm, the nominal value is 3 and the unit of measure is mm.
9. **Min. Extreme**—Enter the minimum extreme value beyond the operating specifications for the aspect point.

   **Note:** **Min. Extreme** must be less than **Min. Critical**.
10 Min. Critical—Enter the lowest possible value for the aspect point.

*Note:* Min. Critical must be less than the Nominal Value.

11 Min. Tolerance—Enter the minimum percentage of critical value for the aspect point.

12 Min. Std. WO—Enter a standard work order to restore normal operating conditions when the minimum critical value is reached.

13 Min. PM—Enter a preventive maintenance work order to restore normal operating conditions when the minimum critical value is reached.

14 Max. Extreme—Enter the maximum extreme value beyond the operating specifications for the aspect point.

*Note:*

*Note:* Max. Extreme must be greater than or equal to the Min. Extreme and Max. Critical.

15 Max. Critical—Enter the highest possible value for the aspect point.

*Note:* Max. Critical must be greater than the Nominal Value and greater than or equal to Min. Critical.

16 Max. Tolerance—Enter the maximum percentage of critical value for the aspect point.

17 Max. Std. WO—Enter a standard work order to restore normal operating conditions when the maximum critical value is reached.

18 Max. PM—Enter a preventive maintenance work order to restore normal operating conditions when the maximum critical value is reached.

19 Click Submit.

*Note:* You cannot remove aspect point records that are indirectly associated with the monitored data object.

### Copying aspect points

Copy existing aspect points associated with a source monitored data object to a selected destination monitored data object.

*Note:* You cannot copy aspect points if you do not have the proper permissions to access the Aspect Points page.

To copy aspect points:

1. Open the Monitored Equipment form.
2. Select the monitored data object to which to copy aspect points, and then click the Aspect Points tab.
3. Click Copy Aspect Points. The system automatically populates Destination and the destination description.
4. Source—Enter the source object. The system automatically populates the source description and the list of aspect points directly associated with the source object.
5. Select—Select each aspect point to be copied from the source object to the destination object.
Note: You must select at least one aspect point that is associated with the source object. To select all the aspect points at once, check Select. To unselect all the aspect points at once, uncheck Select.

6 Click Copy.

Note: You cannot copy aspect points that are already associated with the destination object from the source object to the destination object.

Defining equipment inspection conditions

Specify conditions to meet before inspecting a piece of equipment. For example, conditions for a boiler inspection might include blocking all inlet and outlet valves, cutting the fires from the burners approximately 8 hours prior to the inspection, and cooling the inside of the boiler for 24 hours.

To define equipment inspection conditions:

1 Open the Monitored Equipment form.
2 Select the equipment, profile, or equipment category for which to define equipment inspection conditions, and then click the Point Conditions tab.
3 Click Add Point Condition. The system automatically populates Origin.
4 Point—Enter the point with which to associate the inspection condition and Point Type. The system automatically populates the point description.
5 Condition—Enter the inspection condition. The system automatically populates the condition description.
6 Aspect—Enter the aspect with which to associate the inspection condition as necessary.

Note: Do not enter an Aspect when the Condition applies to the Point, regardless of what aspect is being measured.

7 Click Submit.

Note: You cannot remove point conditions records that are indirectly associated with the monitored data object.

You cannot create a new point condition with the same combination of Point, Point Type, and Aspect as an existing point condition.

Entering additional equipment inspection information

To enter additional equipment inspection information:

1 Open the Monitored Equipment form.
2 Select the equipment, profile, or equipment category for which to enter additional equipment inspection information, and then click the Equipment Details tab.

4 Material Standard—Enter the material standard of the equipment as necessary.

5 Nominal OD—Enter a numeric value for the pipe’s nominal outer diameter. Then, specify the unit of measure for the diameter by selecting Inch or mm (millimeters).

6 MAOP through Lining/Coating—Enter the relevant values according to the design specifications listed by the manufacturer or international standards organizations.

7 Variable 1 through Text 5—Enter any additional information about the object.

8 Click Save Record.

Note: You cannot delete equipment details records that are indirectly associated via the equipment’s category with the monitored data object. If the existing equipment details record is not directly associated with the monitored data object, click Copy Category Data to Equipment to directly associate the equipment details record from the details of the indirectly associated equipment details record.

Recording equipment inspection results

To record equipment inspection results:

1 Open the Monitored Equipment form.

2 Select the equipment, equipment class, or equipment category for which to record inspection results, and then click the Results tab.

3 Click Add Result.

4 Aspect—Enter the aspect associated with the equipment. The system automatically populates the aspect description.

5 Point—Enter the inspection point for which to record results. The system automatically populates Point Type and the point type description.

6 Point Type—Enter the inspection point type for which to enter results. The system automatically populates the point type description.

7 Date—Enter the date of the inspection.

8 Confidence Rating—Select the confidence rating of the results.

9 Result—Select one of the following options:
   • Valid—Select to indicate that the system uses the result in trend analysis.
   • Invalid—Select to indicate that the system does not use the result in trend analysis.
   • Discontinuity—Select to indicate that the system restarts the trend analysis.

10 Work Order—Enter a work order with which to associate the results.

11 Completed—Select to indicate that all results are recorded and verified for this record. The system freezes information for this record.

Note: You cannot modify Completed results.
12 Click Submit.

Note: You cannot modify Completed results.

The above fields are fixed. The system displays variable fields based on the selected aspect. Once you select the Aspect in the header, the system displays the prompts related to the aspect that were defined on the Prompts page of the Aspects form. Enter information for the prompts accordingly. The system displays prompts with formulas as read-only attached at record insert or update.

Defining and associating inspection routes

Define inspection routes and then associate the routes with specific PM work orders.

Defining inspection routes

Follow a prescribed inspection route when performing an inspection. Define inspection routes for a category or for specific pieces of equipment.

Defining inspection route inspection points

Associate inspection routes with a particular sequence of inspection points. The options shown depend on whether you are defining an inspection route for equipment or a route template.

To define inspection route inspection points:

1 Open the Routes form.
2 Select the inspection route for which to define inspection points, and then click the Inspection Points tab. The system automatically populates Sequence Number with the next available integer based on the setting of the installation parameter INCRLINO.
3 Click Add Point.
4 Equipment or Category—Enter the equipment or category that is first in the inspection route sequence. The system automatically populates Equipment Type, and Equipment Org.

Note: For regular inspection routes, you associate equipment inspection points. For route templates, you associate category inspection points.
5 Point Type—Enter the point type.
6 Level—Enter a level value when associating category inspection points. This value tells the system where the inspection point is found in the equipment structure. The equipment specified on the work order is a level 1. Any child equipment items (of the same type) are a level 2 or higher. If you leave this field blank, the system automatically searches the existing equipment hierarchy (as defined on the Equipment form). The system associates inspection points for all child equipment that match the specified class and category, independent of the level.
7 **Point**—Enter the point that is first in the inspection route sequence. The system automatically populates the point description.

8 **Sequence Number**—Enter the sequence number of the inspection point.

9 Click **Submit**.

### Associating inspection routes to work orders

Associate inspection routes with specific PM work orders after defining inspection routes and corresponding inspection points. The system will also create work order inspection points for the work order if at least one inspection route inspection point exists for the inspection route.

**Note:** In order to associate an inspection route with a work order, the work order must have a system status of Released.

Depending on your system configuration, **Route** and **Inspection Status** may not be displayed. Contact your system administrator for additional information.

To associate inspection routes with work orders:

1 Open the **Work Orders** form.
2 Click **New Record**.
3 Enter the information necessary to define a work order.
4 **Route**—Enter the inspection route to associate with the work order. If **Route** is a template route, you must also enter **Equipment**.
5 Click **Save Record**. The system automatically populates **Inspection Status** with **Unfinished**.

### Associating inspection points with work orders

Associate inspection points with a particular work order. Use this feature only when the work order has a system status of **Released** or **Completed** and when the inspection route has a status of **Unfinished**. Finally, enter the results of the inspection into the system after the employee performs the inspection.

To associate inspection points with work orders:

1 Open the **Work Orders** form.
2 Select the work order with which to associate inspection points, and then click the **Inspections** tab.
3 Click **Add Point**.
4 **Point**—Enter the point to associate with the work order. The system automatically populates **Equipment**, equipment description, **Equipment Type**, **Equipment Org.**, point description, **Point Type**, **Aspect**, **Method**, and the **Value** unit of measure.
5 **Sequence Number**—Enter the sequence number of the inspection point.
6 **Method**—Enter the inspection method.
7 **Date**—Enter the date of the inspection.
8 **Result**—Enter the reliability code for the inspection (this code is also used in regression analysis). Choose one of the following options:
   - **The measurement is acceptable**—Select **Valid**.
• *The measurement is wrong*—Select **Invalid**.
• *The inspection point has been changed so drastically that all previous inspection results for this point must be deactivated*—Select **Discontinuity**.

**Note:** If you are entering result details for the work order, you must enter both **Date** and **Result**.

9 **Value**—Enter the value and unit of measure of the inspection.
10 **Finding**—Enter the inspection finding.
11 **Inspected By**—Enter the employee by which the inspection was performed.
12 **Location**—Enter the location of the inspection.
13 **Standard WO**—Enter the standard work order associated with the inspection.
14 **New WO Required**—Select to generate a work order based on the inspection results.
15 **Class**—Enter the class of the inspection. The system automatically populates **Class Org**.
16 **Note**—Enter any additional notes.
17 **Comments**—Enter any additional comments.

**Note:** The system automatically selects **New WO Required** if **Value** exceeds the upper or lower critical value specified for the aspect point.

18 If necessary, click **Create New WO** to generate the work order immediately. However, if the system status of the route is Approved, you cannot create a new work order. You must also select **New WO Required** to create new work orders. The system creates a new work order based on the details of the work order inspection point and inserts the work order number for **Work Order**.

**Note:** If you do not create a new work order by clicking **Create New WO**, the system automatically creates a work order after the inspection results are approved.

19 Click **Save Record**.

### Changing inspection statuses

After defining routes and corresponding inspection points and associating routes with specific work orders, change the statuses of selected work order inspections during different phases of the inspection process.

**Note:** In order to change the status of an inspection, the work order must have a system status of Released or Completed; have inspection points defined; have **Inspection Status** defined (usually with a Work Order Inspection Status of Unfinished); and not be part of an MS Project scheduling session.

To change inspection statuses:

1. Open the **Work Orders** form.
2. Select the work order for which to change the inspection status, and then click the **Inspections** tab.
3. Select the inspection point for which to change the inspection status, and then click **Change Inspection Status**. The system automatically populates **Work Order**, work order description, Route, route description, and **Current Status**.
4. **New Status**—Enter the new status of the inspection.
5. Click **Submit**.
Adding inspection point comments

Add comments for work order inspection points.

To add inspection point comments:

1. Open the **Work Orders** form.
2. Select the work order to associate with inspection points, and then click the **Inspections** tab.
3. Click **Inspection Comments**.
4. Click **Add Comment**.
5. **Language**—Select the language in which to write the comment.
6. **Comments**—Enter the inspection point comments.
7. **Print with Document**—Select to print the comments with the work order.
8. Click **Save**.
9. Click **Close**.

Add inspection custom fields

Add custom fields to work order inspections to further define inspections.

**Note:** The system displays custom fields associated with a class defined for the inspection result entity (INRH) only when **Class** and **Class Org.** on the work order are equal to **Class** and **Class Org.** on a class record that is associated with INRH.

To add inspection custom fields:

1. Open the **Work Orders** form.
2. Select the work order to associate with inspection points, and then click the **Inspections** tab.
3. Click **Inspection Custom Fields**.
4. Enter inspection custom fields as necessary.
5. Click **Submit**.

Adding inspection point custom fields

Add custom fields to work order inspection points to further define inspection points.

To add inspection point custom fields:

1. Open the **Work Orders** form.
2. Select the work order to associate with inspection points, and then click the **Inspections** tab.
3. Select the inspection point for which to add custom fields, and then click **Point Custom Fields**.
4. Enter inspection point custom fields as necessary.
5. Click **Submit**.
Approving inspection results

The Approve Inspection Results form consists of two pages: the Parameters page and the Preview page. On the Parameters page, you can define the selection criteria for locating the inspection points to process in the batch. The Preview page allows you to preview all of the inspection points selected for processing based on the selection parameters, enabling you to select or unselect inspection points to include in the batch generation process before you actually process the inspection point batch. You can select or unselect individual inspection points for processing, or you can select or unselect all inspection points for processing.

Note: In order to approve inspection points, you must have the necessary authorizations to the Approve Inspection Result form and the Preview page, and you must enter a specific organization.

To approve inspection results:

1. Open the Approve Inspection Results form. The system automatically populates Organization.
   
   Note: To select previously defined parameters, select the name of the set of parameters in Parameter List.

2. Organization—Enter the organization to which the inspection point belongs if you use multi-organization security.

3. Route, Work Order, PM, Equipment Type, Equipment, Location, Department, Equipment Class, and/or Category, and Inspection Status—Enter one or all of these selection parameters for generating the inspection point batch.

4. Click Process.

5. Select—Select each inspection point you wish to approve in the inspection point batch as necessary, or you can unselect each inspection point you do not wish to approve in the inspection point batch as necessary.

   Note: To select all the inspection points at once, check Select. To unselect all the inspection points at once, uncheck Select.

6. Click Approve. The system updates the Inspection Status of any affected work orders. If any errors occur, then the system changes the record’s visual attribute to red and displays an error message in the Error Message column of the Preview list.

   Note: If you have set up the system to require an electronic signature to authorize status changes to work order headers or to create work orders, the system displays the eSignature popup once for every inspection point in the inspection point batch for which there is a status change or a new work order is created.

Defining formulas

Define generic formulas to establish any calculation that produces a minimum or maximum critical value for an inspection point aspect combination or any calculation with entered monitored data, and then identify where the system executes those formulas. First, define the actual formula, and then
define parameters used within the formula. The system calculates formulas with SQL statements defined for the parameters used in the formula.

To define formulas:

1. Open the **Formula IDs** form.
2. Click **New Record**.
3. **Formula ID**—Enter a unique code identifying the formula, and then enter a description of the formula in the adjacent field.
4. **Class**—Enter the class of the formula. The system automatically populates **Class Org**.
5. **Formula**—Enter the actual formula using codes to identify parameters. For example, to calculate minimum allowable thickness (MAT) for a cylindrical shell using design pressure (DP), actual outside diameter (OD), and nominal design stress (NDS), enter the following equation:
   \[ \text{MAT} = \frac{\text{DP} \times \text{OD}}{2 \times \text{NDS} + \text{DP}} \]
   
   **Note:** All parameters must have a dollar sign prefix ($).

   To create parameters immediately, click **Verify Parameters**. The system verifies that the parameters exist. If they do not exist, the system asks if you want to create a new parameter. Click **Yes**. The system inserts a new parameter for the formula and updates the Parameters list on the **Parameters** page.

   To perform a validation of a formula, click **Validate Formula**.

   Depending on your system configuration, **Validate Parameters** and **Validate Formula** may not be displayed. Contact your system administrator for additional information.

6. Click **Save Record**.

**Associating parameters with formulas**

After defining formulas, associate parameters used within the formulas.

**Note:** You can also associate parameters with formulas on the **Record View** page by clicking **Validate Parameters**.

To associate parameters with formulas:

1. Open the **Formula IDs** form.
2. Select the formula for which to associate parameters, and then click the **Parameters** tab.
3. Click **Add Parameter**.
4. **Parameter**—Enter the parameter with which to associate the formula. The system automatically populates the parameter description, **Formula UOM**, and **Statement**.
5. **Formula UOM**—Enter the unit of measurement of the formula.
6. Click **Submit**.

   **Note:** Click **Validate Parameter** to check the accuracy of the SQL statement.
Editing formula parameters

Edit details of an existing formula parameter.

To edit formula parameters:

1. Open the Formula IDs form.
2. Select the formula for which to edit parameters, and then click the Parameters tab.
3. Select the parameter to edit, and then click Edit Parameter Details.
4. Edit the parameter details as necessary.
5. Click Submit.
Calibration management

Maintain calibration data to ensure the accuracy of your equipment. The calibration management module coordinates the equipment module with the work management module. Create and edit calibration information on the Assets, Positions, or Systems forms, and then create calibration work orders and enter the actual calibration data on the Work Orders form.

Load test point data and equipment calibration data using the Equipment and Work Order interfaces. To enable data collection for calibration data, you must define the necessary transaction prompts on the DC Transaction Prompts form. See Chapter 5 Data Collection in the System Administrator’s Guide.

The calibration management module also provides extensive reporting capabilities. See "Calibrations reports" on page 633 Chapter 9 Reports for more information.

Understanding calibration management

Calibration is the process of comparing the performance of a piece of equipment to a known standard of accuracy. Calibration results in a measurement that documents whether the equipment deviates from the known standard of accuracy or is compliant with the standard. If the equipment is not in compliance with the standard, calibration may also include adjusting the equipment in a manner that results in the instrument’s compliance with the known standard.

The accuracy of electronic and/or mechanical components within equipment shifts over time, which affects the quality, reliability, health, and safety of component output. Therefore, some instruments/equipment must be calibrated at regular intervals to ensure their accuracy.

Define calibration data for equipment categories, assets, systems, and positions. After defining the test point data, associate equipment work orders and PM work orders. Creating PM work orders enables you to generate regularly scheduled jobs for equipment requiring calibration. You can also create regular calibration work orders as necessary. Designate calibration work orders by selecting the calibration work order type when creating a work order. See "Defining regular work order headers" on page 389.

Calibrate equipment as necessary, and then enter the calibration data and results. The system assigns statuses to calibration work orders based on the test point measurement results.
Run calibration reports for generating, tracking, and maintaining calibration data for your records. See "Calibrations reports" on page 633.

Understanding calibration management terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert Tolerance</td>
<td>Indicates a reading that is acceptable, but is closer to the device tolerance limits than desired. Alert tolerances fall within device tolerance limits and are always calculated as a percentage value. The system calculates the lower and upper alert tolerances based on the following equations: Lower Work Order Alert Tolerance = Standard – ([Alert Tolerance / 100) * (Standard – Lower Equipment Device Tolerance)] Upper Work Order Alert Tolerance = Standard + [Alert Tolerance / 100) * (Upper Equipment Device Tolerance – Standard)]</td>
</tr>
<tr>
<td>Absolute</td>
<td>Indicates the system should process the values entered in Device Tolerance as absolute values. The system calculates the range at which the work order will pass or fail based on the following equations: Lower Work Order Device Tolerance = Standard – Lower Equipment Device Tolerance Upper Work Order Device Tolerance = Standard + Upper Equipment Device Tolerance For example, if the Standard is 25, and the Device Tolerance of the equipment is 5-5, the reading must fall within a range of 20 to 30 for the work order to pass.</td>
</tr>
<tr>
<td>Default set</td>
<td>The default set of calibration test points that apply to calibration work orders/PM work orders</td>
</tr>
<tr>
<td>Deviation</td>
<td>The difference between the Device Reading and the Standard</td>
</tr>
<tr>
<td>Device tolerance</td>
<td>The allowable deviation from the standard for the device being used to perform the calibration measurement. A specified device tolerance indicates the range of variation permitted in maintaining adherence to the standard for the device.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Increment</strong></td>
<td>The increment specifies the numeric interval of which a device reading must be evenly divisible. For example, if you specify an <strong>Increment</strong> of 5, you must enter a <strong>Device Reading</strong> that is evenly divisible by 5, such as 0, 5, 10, 15, 20, 25, etc.</td>
</tr>
<tr>
<td><strong>Instrument type</strong></td>
<td>A series of one or more instruments requiring and/or used for calibration that are linked together.</td>
</tr>
<tr>
<td><strong>Standard applied to</strong></td>
<td>An instrument to which a standard is applied during calibration.</td>
</tr>
<tr>
<td><strong>Accessory</strong></td>
<td>An instrument that is secondary or subordinate within a loop.</td>
</tr>
<tr>
<td><strong>Reading taken from</strong></td>
<td>An instrument from which a reading is taken during calibration.</td>
</tr>
<tr>
<td><strong>Loop</strong></td>
<td>A series of one or more instruments requiring and/or used for calibration that are linked together.</td>
</tr>
<tr>
<td><strong>Output</strong></td>
<td>The reading or measurement produced by the calibration measurement at a calibration point.</td>
</tr>
<tr>
<td><strong>Output range</strong></td>
<td>The allowable deviation from the standard for the output that indicates the range of variation permitted to adhere to the standard for the test point.</td>
</tr>
<tr>
<td><strong>Percentage</strong></td>
<td>Indicates the system processes the values entered in <strong>Device Tolerance</strong> as percentages.</td>
</tr>
<tr>
<td></td>
<td>The system calculates the range at which the work order will pass or fail based on the following equations:</td>
</tr>
<tr>
<td></td>
<td>Lower Work Order Device Tolerance = Standard – [Standard * Lower Equipment Device Tolerance / 100]</td>
</tr>
<tr>
<td></td>
<td>Upper Work Order Device Tolerance = Standard + [Standards * Upper Equipment Device Tolerance / 100]</td>
</tr>
<tr>
<td></td>
<td>For example, if the Standard is 25, and the Device Tolerance of the equipment is 5-5, the reading must fall within a range of 23.75 to 26.25 for the work order to pass.</td>
</tr>
</tbody>
</table>
### Calibration management

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Precision</strong></td>
<td>Indicates the maximum number of decimals allowed to the right of the decimal point for a reading.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can enter a number with fewer than the maximum number of decimals allowed to the right of the decimal point. The system assumes there are zeros at the end of the specified number.</td>
</tr>
<tr>
<td></td>
<td>The precision indicates the degree of refinement with which the calibration is performed or the calibration measurement is stated.</td>
</tr>
<tr>
<td><strong>Process range</strong></td>
<td>The reading or measurement produced by the calibration measurement process at a calibration point.</td>
</tr>
<tr>
<td><strong>Process tolerance</strong></td>
<td>The allowable deviation from the standard for the process that indicates the range of variation permitted to adhere to the standard for the test point.</td>
</tr>
<tr>
<td><strong>Sequence</strong></td>
<td>Indicates the order in which the test points should be calibrated.</td>
</tr>
<tr>
<td><strong>Set</strong></td>
<td>A number assigned to identify a group of test points.</td>
</tr>
<tr>
<td><strong>Standard</strong></td>
<td>The ideal reading for a piece of equipment against which actual readings should be measured. Standard also refers to the parts used to perform a calibration.</td>
</tr>
<tr>
<td><strong>Test point</strong></td>
<td>The actual point (calibration point) at which the accuracy of the equipment is tested to the known standard. A piece of equipment that requires calibration may consist of numerous test points.</td>
</tr>
<tr>
<td><strong>Test point range</strong></td>
<td>The numeric values indicating the acceptable range for the test point, e.g., 10 to 20. The values identify the upper and lower limits of the standard for the test point. The test point reading must fall within this range for the test point to pass.</td>
</tr>
</tbody>
</table>

### Understanding calibration loops

A loop is a series of one or more instruments. Typically, the individual instruments in a loop are not calibrated; the loop is calibrated as one unit. Therefore, you must be able to measure the output of a loop whenever you apply a known standard as the loop’s input.
Designate an instrument as a loop on the **Calibration** page of the equipment record. See "Defining calibration test point data" on page 579.

**Note:** Depending on your system configuration, the system may not display **Loop** on the **Calibration** page of the Categories, Assets, Positions, or Systems forms. Contact your system administrator for more information.

Link instruments to the loop equipment through parent-child relationships in a hierarchy. All instruments in a loop must be linked directly as children of the loop equipment in an equipment hierarchy. See "Creating equipment hierarchies" on page 106. Within the equipment hierarchy of the loop, designate the parent equipment as a **Loop** and designate the child equipment in the loop as an **Instrument** on the **Calibration** tab of the equipment record. See "Defining calibration test point data" on page 579.

If you create a calibration work order for a loop, the loop is displayed on the work order header, and the test points defined on the loop are copied to the work order. When calibrating loops, the calibration standard is often applied to the input loop instrument. The reading is then taken at the output loop instrument. The system creates test points on the work order for instruments in the loop that are defined as type **Reading taken from**. See "Entering calibration results" on page 582.

---

**Defining calibration test point data**

Define test point data for assets, positions, and systems or for equipment categories.

Define calibration data for equipment categories to associate calibration data at the category level. The system applies the calibration data to all equipment within the specified category. For example, define calibration test points for all pressure indicators rather than having to enter the data individually for each pressure indicator.

The system copies calibration and test point data entered for a piece of equipment to the **Calibration** page of the **Work Orders** form when a calibration work order for the piece of equipment is released.

---

**Step 1: Define basic calibration data**

To define basic calibration data:

1. Open the **Assets, Positions, Systems**, or **Categories** form.
2. Select the asset, position, system, or category for which to define calibration data, and then click the **Calibration** tab.
3. **Instrument** and **Loop**—Select to indicate whether the piece of equipment is an individual calibration instrument or is part of a calibration loop.
4. **Instrument Type**—Choose one of the following options if the instrument is within a loop:
   - **Standard applied to**—Select to indicate the instrument is a point in the loop to which a standard is applied.
   - **Accessory**—Select to indicate the instrument is secondary or subordinate within the loop.
Reading taken from—Select to indicate the instrument is a point in the loop at which calibration readings are taken.

5 Test Point UOM—Enter the unit of measure for the test point.

6 Device Tolerance—Enter the range of the device tolerance for the piece of equipment, e.g., 10 to 20. The values entered indicate the desired range for the calibration measurement and can be either an absolute or a percentage.

7 Alert Tolerance—Enter the alert tolerance for the piece of equipment. The system interprets the value entered as a percentage.

8 Precision—Enter the precision of the instrument.

9 Output Range—Enter numeric values indicating the potential range of the device output, e.g., 200 to 500.

10 Default Set—Enter a value identifying the calibration data and test points as the default set of test points for the equipment. Designate the set of test points as the default set to indicate which set of test points to copy to manually created calibration work orders. The system also copies the default set when creating PM equipment records.

11 P&ID Drawing—Enter the process and instrument diagram drawing number.

12 P&ID No—Enter the process and instrument diagram number.

13 Output UOM—Enter the unit of measure for the device output.

14 Choose one of these options to indicate the type of value for the specified Device Tolerance:
   • Percentage—Select to apply the values entered in Device Tolerance as a percent value.
   • Absolute—Select to apply the values entered in Device Tolerance as an absolute value.

15 Increment—Enter the increment that the instrument can read.

Note: If you enter an Increment for a test point, the Device Reading that you enter on the Calibration page of the Work Orders form must be a multiple of the specified Increment when entering calibration results, e.g., if you enter an Increment of 5, you must enter a Device Reading that is a multiple of 5, such as 5, 10, 15, 20, 25, etc.

16 Device Range—Enter numeric values indicating the potential range for the device, e.g., 250 to 450.

17 Process Tolerance—Enter the range of the process tolerance, e.g., 10 to 20.

18 Process Range—Enter the range of the process, e.g., 150 to 600.

19 S.O.P.—Enter the standard operating procedure for calibration.

20 Click Save Record. The system automatically populates Next Cal. Due with the date of the next calibration work order for the piece of equipment.

Note: The system does not display Next Cal. Due on the Calibration page of the Categories form. Update calibration data as necessary. The system applies new data entered in Test Point UOM and Device Tolerance to work order test points created after you make the update. The system does not update the data on existing test point records.

Right-click, and then select View Calibration Results to view calibration results for the equipment record.
If you are defining calibration data for a category, click **Update Equipment**. The system copies the calibration data to all equipment records within the category. Prior to copying the calibration data, the system deletes any calibration data for this category from related equipment records.

---

### Step 2: Define or import test point data

#### Defining test point data

To define test point data:

1. Open the **Assets**, **Positions**, **Systems**, or **Categories** form.
2. Select the asset, position, system, or category for which to define test point data, and then click the **Test Points** tab. The system automatically populates **Sequence** and **Device Tolerance** if available.
3. Click **Add Test Point**. The system inserts a new Test Point Details record.
4. **Set**—Enter a value to identify the test point set.
5. **Sequence**—Enter a value identifying the sequence in which the test point is calibrated.
6. **Test Point**—Enter the point at which to test the piece of equipment, and then enter the unit of measure for the test point in the adjacent field.
7. **Output**—Enter the test point output if testing is performed for dual units of measure, and then enter the unit of measure of the output in the adjacent field.
8. **Device Tolerance**—Enter the range of the device tolerance for the piece of equipment, e.g., 10 to 20. The values entered indicate the desired range for the calibration measurement and can be either an absolute or a percentage. By default, the system reads these values as percentages.
9. **Comments**—Enter comments for the test point.

10. Click **Submit**.

**Note:** if you delete a test point, the system does not update the sequence numbers of other test points.

To modify an existing test point, select the test point to modify, and then edit fields as necessary. You can update **Test Point**, **Device Tolerance**, and **Comments** for existing test points. You cannot update **Sequence**.

If you are defining test points for a category, click **Update Equipment**. The system copies the test points to all equipment records within the category. Prior to copying the test points, the system deletes any test points for this category from related equipment records.

---

#### Importing test point data

Test point data can be imported (copied) from existing equipment, categories, or work orders to save time if test points are duplicated across similar instruments or calibration records.

**Note:** Test points cannot be imported from or to more than one record simultaneously.

Test points can be imported to a work order from an asset, position, system, category record, or work order. However, test points cannot be imported to an asset, position, system, or category from a work order.

When copying test points from one work order to another work order, the system will not copy the **Device Reading**, **Deviation**, or test point **Status**. No "As Left" data will be copied.
If one or more imported test points already exist on the destination record, the system displays a warning message and re-sequences the imported test points to avoid duplication. You may then make any corrections if necessary.

Records that do not have any associated test points will not be available to import from. Records whose organization is not associated to the user will not be available to import from.

When importing from a work order to a work order, records whose organization does not match the destination work order organization will not be available to import from.

Categories, assets, positions, systems, and work orders whose is > the Precision of the destination record will not be available to import test points from Precision.

When importing test points to a work order from a category or equipment, the system always converts any test point tolerances defined as Percentage to absolute values for display on the Calibration page of the Work Orders form. This conversion is not necessary when importing test points from another work order since the system will have already converted the work order test point tolerances to absolute values.

**Entering calibration results**

Enter calibration results for work orders to report calibration data for the actual work performed while calibrating a piece of equipment.

The system copies test point data for equipment to the Calibration page of the Work Orders form for any calibration work order once it is released. See "Defining calibration test point data" on page 579. If you need to enter calibration results for a work order that you did not specify as being a calibration work order, you must manually enter the test point data.

If a work order is a multiple equipment work order, you can also enter calibration test points and data for child equipment on the work order.

The calibration results you enter determine the Calibration Status of the work order, as well as the Status for each test point.

**Note:** Generate a calibration record report for a work order as necessary before beginning the calibration process. See "Calibration record report" on page 635.

To enter calibration results:

1. Open the Work Orders form.
2. Select the work order for which to enter calibration results, and then click the Calibration tab. The system automatically populates Calibration Status with the status of the calibration and S.O.P., P&ID No., Precision, Increment, P&ID Drawing, and Alert Tolerance based on the information entered on the Calibration tab of the equipment record listed on the work order. The system populates Last Calibrated with the completed date for the last calibration work order for the piece of equipment and Calibration Interval with the interval specified on the work order’s PM.
3. Select the test point for which to enter calibration results. If the calibration work order is released, the system automatically populates Equipment, Sequence, Equipment Org., Test Point, and the...
unit of measure for the test point based on the test point data entered for the equipment listed on
the work order.

4 Equipment—Choose one of the following options if the work order is a multiple equipment work
order:

• Enter All Equipment to create the test point for each of the Related Work Orders associated
with all of the equipment records on the Calibration page of the Work Orders form.

  Note: If the work order is a multiple equipment type work order and you click Add Test Point
without selecting an existing test point, the system automatically populates Equipment with All
Equipment. If you select an existing test point and then click Add Test Point on a multiple
equipment work order, the system populates Equipment, Equipment Description, Equipment
Org., Related Work Order, Test Point UOM, Standard UOM, and Output UOM from the
selected record.

If All Equipment is selected for Equipment, then Device Tolerance, Device Reading, and
Status are protected, because you cannot distribute these values to all equipment on the work
order.

• Enter WO Header Equipment to create the test point for each equipment record on the Calibration
page of the Work Order on the work order header.

• Enter a specific Equipment record to create the test point for the Related Work Order associated
with the selected Equipment. See "Adding equipment to work orders to split work order costs"
on page 398.

5 Not Applicable—Select to indicate the test point is no longer applicable for the calibration process.

6 Test Point—Enter the test point value for the calibration, and then enter the unit of measure for the
test point in the adjacent field.

Complete steps 7 through 10 in the As Found section of the form to enter the calibration results.

7 Standard—Enter the standard value for the calibration, and then enter the unit of measure for the
standard in the adjacent field.

8 Device Tolerance—Enter the range of the device tolerance.

9 Output—Enter the value of the test point output, and then enter the output’s unit of measure in the
adjacent field.

10 Device Reading—Enter the reading of the device.

The system subtracts the Standard from the Device Reading to determine the Deviation. The
system automatically populates Status based on the calibration results you enter.

Complete step 11 in the As Left section of the form if recalibration is required.

  Note: Click Copy to As Left to copy the data from the As Found section to the As Left section,
and then modify the fields as necessary.

11 Standard, Output, Device Tolerance, and Device Reading—Enter the calibration standard, output,
device tolerance, and device reading. The system subtracts the Standard from the Device Reading
to determine the Deviation. The system automatically populates Status based on the calibration
results you enter.

12 Click Submit.

  Note: To add a new test point, click Add Test Point. The system inserts a new Test Point Details
record. Enter data as necessary, and then click Submit.
If you delete a test point for which the test point Equipment is associated with a MEC work order, then the system removes the test point from the Related Work Order.

The system calculates the work order’s calibration status based on the status of each test point. For multiple equipment work orders, the calibration status of the parent work order considers the test points for all of its related work orders.

To run a calibration record report, click Run Calibration Report. See "Calibration record report" on page 635.

Viewing loop instruments for a work order

View loop instruments for a work order containing an object that is a loop to access a list of all the instruments within the loop.

**Note:** The system activates View Loop Instruments if the work order contains a loop. See "Understanding calibration loops" on page 578 for an explanation of loops.

To view loop instruments for a work order:

1. Open the Work Orders form.
2. Select the calibration work order for which to view a loop, and then click the Calibration tab.
3. Click View Loop Instruments.
4. View the loop instrument information.
   *Note:* If the work order for which you are viewing loop instruments is a multiple equipment work order, then the system displays the loop instruments associated with the selected test point Equipment, because more than one loop can be calibrated on a multiple equipment work order.
5. Click Close.

Defining standards used for calibration

Define the specific piece of equipment used as a standard for the selected work order. The Standards Used popup displays a list of parts that serve as potential parts from which to specify the piece of equipment and/or lot used for the calibration.

To define standards used for calibration:

1. Open the Work Orders form.
2. Select the work order for which to define standards used during calibration, and then click the Calibration tab.
3. Click Standards Used. The Standards Used popup automatically displays parts for which you selected Calibration Standard and to which you associated the work order’s equipment record on
the Parts Associated page of the Assets, Positions, or Systems form. See "Creating parts" on page 190 and "Associating parts" on page 64.

Note: If the work order for which you are defining standards used is a multiple equipment work order, then the system displays the parts used as calibration standards associated with the selected test point Equipment record.

4 Select the part for which to specify equipment and/or lot information. The system automatically populates Part and Part Org.

5 Equipment—Enter the equipment record used for calibration.

Note: The system displays equipment records to which you associated the selected part via the Part field on the Record View page of the Assets, Positions, or Systems form. See "Defining assets" on page 85, "Defining positions" on page 89, and "Defining systems" on page 92.

If the work order for which you are defining standards used is a multiple equipment work order, you can associate a test point with a specific equipment or with all equipment on the work order.

6 Lot—Enter the lot of the part record.

7 Click Submit.

Note: To add a standard, click Add Standard. The system inserts a new Standard Details record. Enter the Part, Equipment, and Lot, and then click Submit.

Viewing calibration results

To view calibration results:

1 Open the Calibration Results form.
2 View the calibration information.
Calibration management
Define special projects in addition to the work defined in the work management and asset management modules. Examples of special projects are painting a room or building a new production line. Break large projects down into more manageable sub-projects, and assign individual work orders to each step. You can also set up budget requirements and monitor costs for projects. Charge work orders and purchase orders against projects. The system displays actual costs, committed costs, and planned costs, eliminating guesswork.

Defining initial project information

Define initial project information before using the project management module.

Defining budget codes for projects

Define budget codes to be associated with projects. Designate default budget codes.

Note: The system only displays Cost Area, Cost Center, and Code of Accounts if the installation parameter PROJTRCK is ON. Cost Area, Cost Center, and Code of Accounts are linked to entities for which you must define user codes. Contact your system administrator for more information.

To define budget codes for projects:

1. Open the Project Budgets form.
2. Click New Record.
3. Project Budget—Enter a unique code identifying the budget, and then enter a description of the budget in the adjacent field.
4. Class—Enter the class of the budget. The system automatically populates Class Org.
5. Cost Area—Select the cost area of the budget.
6. Default—Select if the budget is a default budget.

Note: You can link default budgets to projects on the Project Budgets form. See "Linking default budget codes with projects" on page 591.
7 Cost Center—Select the cost center of the budget.
8 Code of Accounts—Select the code of accounts for the budget.
9 Click Save Record.

Defining shutdown codes

Define shutdown codes, and then define equipment to service during shutdowns. Your organization might have equipment that can only be serviced when it is completely out of service or shut down. A shutdown can represent either a part of the facility or a type of shutdown to be performed.

To define shutdown codes:
1 Open the Shutdowns form.
2 Click New Record.
3 Organization—Enter the organization to which the shutdown belongs if you use multi-organization security.
4 Shutdown—Enter a unique code identifying the shutdown, and then enter a description of the shutdown in the adjacent field.
5 Class—Enter the class of the shutdown. The system automatically populates Class Org.
6 Click Save Record.

Associating standard work orders, equipment, and projects with shutdown codes

Associate standard work orders, specific equipment, and project budgets with the shutdown identification codes. For example, create a shutdown identification code for each station, and then associate each piece of equipment in the station with that identification code.

Note: You cannot associate standard work order templates with shutdown codes.

To associate standard work orders, equipment, and projects with shutdown codes:
1 Open the Shutdowns form.
2 Select the shutdown code with which to associate a standard work order and equipment, and then click the Equipment tab.
3 Click Add Equipment. The system inserts a new Equipment Details record.
4 Equipment—Enter the equipment to associate with the shutdown code. The system automatically populates Equipment Org. and Equipment Type.
5 Standard WO—Enter the standard work order describing the work to be performed when the shutdown occurs.
6 Project Budget—Enter the budget code to be referenced on the shutdown work order.
7 Click Submit.
Defining parent and child projects

Define parent projects and create as many child projects as needed. Define parent projects and budget codes before defining child projects. For example, if the parent project is building a new road, set up a project for the road construction, and then define individual steps for each child project, such as surveys, excavation, infrastructure, paving, seal coating, and painting.

For each project you create, include a budget amount. Once the project is approved, the system saves the budget amount. Update the amount later if the budget changes. The system retains the original value and stores revision information against that amount. Any changes to labor and material estimates for child projects are validated against the parent project budget. If estimates exceed the set budget, the system displays a warning message.

Defining project basics

Define project basics by entering basic project information. Define parent projects and budget codes before defining child projects. When you specify a parent project for a child project, the system inserts the budget records of the parent project on the child project.

Note: Estimate to Complete indicates the calculated sum of the values displayed for Estimate to Complete for each budget entered on the Budgets page of the Projects form. See "Associating predefined budget codes with projects" on page 593.

The system automatically updates Estimate to Complete any time Estimate to Complete is updated manually or automatically for any budget on the Budgets page.

To define project basics:

1. Open the Projects form.
2. Click New Record.
3. Organization—Enter the organization to which the project belongs if you use multi-organization security.
4. Project—Enter a unique code identifying the project, and then enter a description of the project in the adjacent field.
5. Coordinator—Enter the employee code of the project coordinator.
6. Parent Project—Enter a parent project if applicable.
   Note: You can only specify a parent project while defining a new project. Once the project is saved, the system does not allow you to add a parent project.
7. Estimated Start Date—Enter the intended starting date for the project.
8. Estimated End Date—Enter the intended ending date for the project.
9. Shutdown—Enter a shutdown identification code to associate with the project if the project requires the shutdown of equipment. The system automatically populates Shutdown WOs.
10. Status—Enter the status of the project.
   Note: All projects start with a Status of Awaiting Approval.
11 **Actual Start Date**—Enter the actual starting date for the project.

12 **Actual End Date**—Enter the actual ending date for the project.

13 **Class**—Enter the class of the project. The system automatically populates **Class Org., Capital Planning Request, Capital Planning Request Org., Project WOs, and Shutdown WOs Created**.

   **Note:** The system automatically populates **Capital Planning Request, Capital Planning Request Org., Project WOs, and Shutdown WOs Created** for projects created on the **Capital Planning Requests** form.

14 **Current Budget**—Enter the total budget amount for the project. Budgets of child projects do not roll up to the budget of the parent project. The system displays the estimated cost of completing the project in **Estimate to Complete** and the total budget approved for the project in **Budget Approved**.

15 **Budget Date**—Enter the date the budget was established.

   **Note:** You must enter a **Budget Date** that is before or equal to the current date.

16 **Labor**—Enter the estimated internal labor costs.

17 **Services**—Enter the estimated services costs.

18 **Hired Labor**—Enter the estimated hired external labor costs.

19 **Stock Items**—Enter the estimated stock material costs.

20 **Direct Purchases**—Enter the estimated amount of money needed to purchase materials not normally stocked in house.

21 **Tool Cost**—Enter the estimated tool usage costs.

22 Click **Save Record**.

   **Note:** Depending on your system configuration, the system may require an electronic signature to create a work order. The system displays the eSignature popup once regardless of the number of shutdown work orders created.

To generate shutdown work orders associated with a project, click **Create Shutdown WOs**. See "Generating shutdown work orders" on page 594.

To close open work orders associated with a project, click **Close WOs**. See "Closing Work Orders Associated with Projects".

To detach detachable work orders associated with a project, click **Detach WOs**. See "Detaching and Deleting Work Orders Associated with Projects".

To delete deletable work orders associated with a project, click **Delete WOs**. See "Detaching and Deleting Work Orders Associated with Projects".

## Associating predefined budget codes with projects

Associate one or more budget codes with each defined project. Also, define the budget amount for the project. Define child projects, or sub-projects, only after finishing this procedure. Child projects share the budget codes of the parent project.
Note: If you do not associate the budget of a shutdown work order with the project, the system does not create the shutdown work order when you click Create Shutdown WOs on the Projects form. See "Generating shutdown work orders" on page 594.

The system monitors the expenditures for parts and labor for the project and any child projects, and it breaks the budget amount of the main project down into a budget amount for each subproject. It validates these expenditures against the budget amount. Regard the budget values defined here as sub-budget values, in comparison with the budgets defined on the Projects form. After the project is complete, the system freezes all associated budget items.

Note: You do not need to create project budget codes for child projects.

To associate predefined budget codes with projects:

1. Open the Projects form.
2. Select the project for which to associate budget codes, and then click the Budgets tab.
3. Click Add Budget.
4. Budget—Enter a budget code for the project. The system automatically populates the budget description, Class, Class Org., Cost Area, Cost Center, and Code of Accounts from the project budget code.
5. Budgeted Amount—Enter the total budgeted amount for this project.
   Note: You can associate additional budget codes with a project throughout the project life cycle; however, you cannot delete codes after assigning them to a work order.
   You may change Budgeted Amount at any time.
6. Estimate to Complete—Enter the estimated expenditures remaining for this project for the selected budget.
   Note: When creating an initial budget for the selected budget code, the system automatically populates Estimate to Complete with the value entered in Budgeted Amount. If applicable, the system automatically subtracts the value of any planned, on order, actual, and invoice difference costs that may be incurred against this project/budget from the value entered in Budgeted Amount, and then populates Estimate to Complete with the calculated value. Modify the value of Estimate to Complete as necessary.
   Additionally, the system calculates the sum of all the values entered for Estimate to Complete for each budget on the Budgets page of the Projects form and then automatically populates Estimate to Complete on the project record with this value. See "Defining project basics" on page 589.
7. Click Submit.

Linking default budget codes with projects

Link default budget codes with a project to retrieve all budget codes for which Default is selected on the Project Budget Codes form.

You can define budget codes as default codes on the Project Budget Codes form. See "Defining budget codes for projects" on page 587.
To link default budget codes with projects:

1. Open the Projects form.
2. Select the project for which to associate default budget codes, and then click the Budgets tab.
3. Click Add Default Budgets.

Granting purchasing authorization permissions for projects

Authorize users to create requisitions and/or purchase orders for a specific project. If you add any authorized users to a project, no other users can create requisitions and/or purchase orders for the project.

**Note:** If you do not add any authorized users to a project, any user with the appropriate group-level permissions can create requisitions and purchase orders for the project.

Select Approver to enable a user to approve purchase requisitions and purchase orders for the project. A user can only approve purchase requisitions and purchase orders for the project if you selected Approver for the user and if the user has the proper authorizations set on the Status Change Authorizations form. See “Granting status change authorization permissions” in the *Infor EAM System Administrator’s Guide*. If you specify any authorized users as approvers for a project, no other users can approve requisitions and/or purchase orders for the project.

**Note:** If you add authorized users to the project but do not select Approver for any of them, the system does not allow any users to approve purchase requisitions or purchase orders for the project.

Additionally, if the user has been granted proper authorization on the Status Change Authorizations form, selecting Approver for a user also enables them to create, update, and delete budget code information on the Budgets tab of the Projects form.

**Note:** Click Add Buyers to retrieve a list of all users set up as buyers for the organization of the project. The system retrieves all users set up as buyers, adds each buyer to the User Authorization list, and automatically selects Approver for each user. You can unselect Approver for each user as necessary. See "Creating users" in the *Infor EAM System Administrator’s Guide* for information about setting up users as buyers.

To grant purchasing authorization permissions for projects:

1. Open the Projects form.
2. Select the project for which to add authorized users, and then click the User Authorization tab.
3. Click Add User.
4. User—Enter the user to add as an authorized user for the project.
5. Approver—Select to indicate that the authorized user can approve purchase requisitions and purchase orders for the project.
6. Click Submit.
Viewing project hierarchy

View all child projects, or sub-projects, related to a parent project.

To view project hierarchy:

1. Open the Projects form.
2. Select the project for which to view hierarchy, and then click the Sub-projects tab.
3. View the sub-projects related to the project.

Creating project work orders

Create project work orders by creating new work orders in the work management module or by associating work orders created previously with a project.

Creating new project work orders

After defining the project and any sub-projects, use the Work Orders form to create the appropriate work orders. To link the work order to a specific project, enter a project budget on the work order.

To create new project work orders:

1. Open the Work Orders form.
2. Click New Record.
3. Enter information into the fields as necessary. See "Creating regular work orders" on page 388.
4. Project-Budget—Enter the project and budget of the work order.
5. Department—Enter the department of the work order.
6. Click Save Record.

Associating predefined budget codes with projects

Associate one or more budget codes with each defined project. Also, define the budget amount for the project. Define child projects, or sub-projects, only after finishing this procedure. Child projects share the budget codes of the parent project.

Note: If you do not associate the budget of a shutdown work order with the project, the system does not create the shutdown work order when you click Create Shutdown WOs on the Projects form. See "Generating shutdown work orders" on page 594.

The system monitors the expenditures for parts and labor for the project and any child projects, and it breaks the budget amount of the main project down into a budget amount for each subproject. It validates these expenditures against the budget amount. Regard the budget values defined here as
sub-budget values, in comparison with the budgets defined on the Projects form. After the project is complete, the system freezes all associated budget items.

**Note:** You do not need to create project budget codes for child projects.

To associate predefined budget codes with projects:

1. Open the Projects form.
2. Select the project for which to associate budget codes, and then click the Budgets tab.
3. Click Add Budget.
4. **Budget**—Enter a budget code for the project. The system automatically populates the budget description, Class, Class Org., Cost Area, Cost Center, and Code of Accounts from the project budget code.
5. **Budgeted Amount**—Enter the total budgeted amount for this project.
   **Note:** You can associate additional budget codes with a project throughout the project life cycle; however, you cannot delete codes after assigning them to a work order.
   You may change Budgeted Amount at any time.
6. **Estimate to Complete**—Enter the estimated expenditures remaining for this project for the selected budget.
   **Note:** When creating an initial budget for the selected budget code, the system automatically populates Estimate to Complete with the value entered in Budgeted Amount. If applicable, the system automatically subtracts the value of any planned, on order, actual, and invoice difference costs that may be incurred against this project/budget from the value entered in Budgeted Amount, and then populates Estimate to Complete with the calculated value. Modify the value of Estimate to Complete as necessary.
   Additionally, the system calculates the sum of all the values entered for Estimate to Complete for each budget on the Budgets page of the Projects form and then automatically populates Estimate to Complete on the project record with this value. See "Defining project basics" on page 589.
7. Click Submit.

**Generating shutdown work orders**

Generate shutdown work orders, directly from the Project form, if the nature of your project requires that you take equipment out of service. A shutdown work order is no different than any other work order with the exception that you create shutdown work orders in the Project form and specify a shutdown identification code for the project.

After creating shutdown work orders, you can view them in the List View of the Work Order form. Newly created shutdown work orders contain a system status of Released or the equivalent to that system status based on your system configuration.

**Note:** The project status must be approved and a shutdown identification code must be specified in Shutdown to create shutdown work orders. See "Defining shutdown codes" on page 588 to set up specific shutdown identification codes.
Before creating a shutdown work order, you must associate the budget code of a shutdown work order with the project on the Budgets page of the Project form. See "Associating predefined budget codes with projects" on page 593.

To generate shutdown work orders:

1. Open the Projects form.
2. Select the project for which to generate shutdown work orders, and then click the Record View tab.
3. Click Create Shutdown WOs.

   **Note:** You may only create shutdown work orders for a project once. If Shutdown WOs is any number other than 0, the system does not allow you to create shutdown work orders.

Viewing all work orders associated with projects

View all work orders related to projects. If necessary, detach work orders from a project.

To view all work orders associated with projects:

1. Open the Projects form.
2. Select the project for which to view associated work orders, and then click the Work Orders tab.
3. View the work orders associated with the project.

   **Note:** Click Detach WOs to detach work orders from the project. The system only detaches those work orders that have no costs or transactions associated with them. Before detaching the work orders, the system verifies that you want to detach all detachable work orders. Click Yes to detach all work orders that have no costs or transactions associated with them from the project.

Viewing project purchase orders

View purchase orders associated with a specific project. Information in the list includes the purchase order number, status, creation date, supplier, store, purchase order type, total cost, and outstanding balance.

Purchase order headers are not directly associated with projects because a single purchase order may include parts and/or services for several projects. However, an individual order line of a purchase order can be project-specific. The system automatically associates an order line, both for parts or services, with a project when the order line links to a work order activity that is part of a project. When a purchase order has at least one order line associated with a project, the system displays the purchase order in the project’s list.

See "Creating and revising purchase orders" on page 320.

To view project purchase orders:
1 Open the **Projects** form.
2 Select the project for which to view associated purchase orders, and then click the **Purchase Orders** tab.
3 View the project purchase order information.

**Viewing detailed project cost summaries**

View existing costs for a Project. The system includes all child projects associated with a parent project.

The **Costs** page summarizes and compares estimated, planned, actual, and total costs for projects. It also summarizes and compares the cost of materials on order, the budget amount remaining, and the difference between the actual cost of each cost category and the invoice cost for each project.

To view detailed project cost summaries:

1 Open the **Projects** form.
2 Select the project for which to view associated costs, and then click the **Costs** tab.
3 View the costs associated with the project.

**Creating campaigns**

A campaign is a list of jobs that may be performed on a given list of equipment as necessary to complete work. Campaigns are comprised of two types of events:

- **Survey**—Maintenance personnel checks equipment specified on the work order to see if issue(s) exist.
- **Job**—Work order to correct issue(s) found.

If equipment passes the survey, work on the equipment is unnecessary.

If equipment fails the survey, work on the equipment is necessary. All survey results are recorded on the Equipment page of the Campaigns form, or the Survey Equipment page of the Work Orders form.

A campaign can have multiple jobs listed to complete work on necessary equipment, however only one survey is allowed per campaign.

To create campaigns:

1 Open the **Campaigns** form.
2 Click **New Record**.
3 **Organization**—Enter the organization of the campaign.
4 **Campaign**—Enter the unique, identifying code for the campaign, and then enter a description in the adjacent field.
5 **Status**—Select the status of the campaign.
6 **Class**—Enter the class of the campaign. The system automatically populates the **Class Org., Open WOs, Closed WOs, and Total WOs**.

7 **Type**—Enter the type for the campaign.

8 **Survey Required**—Select to require a survey campaign event to check all specified equipment for necessary repairs.

9 **Campaign Manager**—Enter a manager for the campaign.

10 **Project-Budget**—Enter both the project and budget to associate to this campaign.

11 Click **Save Record**. The system automatically populates **CreatedBy** and **Date Created**.

---

**Adding events to campaigns**

A campaign event is either a survey of equipment on the specified campaign to check for equipment repairs needed, or a job to perform to repair equipment. If a piece of equipment passes the survey event, work is not necessary. If a piece of equipment fails the survey, a job event is performed to repair the equipment. A campaign can have only one survey event, but several job events.

Add, change, or delete campaign events as necessary.

To add events to campaigns:

1 Open the **Campaigns** form.

2 Select a campaign, and then click the **Campaign Events** tab.

3 Click **Add Campaign Event**.

4 **Campaign Event**—Enter the order in which this campaign event will occur.

5 **Project-Budget**—Enter both the project and budget to associate to this campaign event.

6 **Standard WO**—Enter the standard work order to associate to this campaign event.

7 **Assigned To**—Enter the person responsible for the work order.

8 **Assigned By**—Enter the supervisor who assigned the work order.

9 **Requested By**—Enter the person who requested the work.

10 **Survey**—Select to mark this campaign event as an equipment survey type.

11 **Production Priority**—Enter the priority for the production. The system automatically populates **Production Priority Desc**.

12 **Req. Start Date Buff. (Days)**—Enter the number of days needed prior to the starting date for the work order.

13 **Req. End Date Buff. (Days)**—Enter the number of days needed after the ending date for the work order.

14 **Downtime (Hours)**—Enter the number of hours that the equipment was out of operation due to failure.

15 **WO Description**—Enter a description of the work to be performed for the campaign event.

16 **WO Type**—Select the type for the work order.

17 **Priority**—Enter the priority of the work order for the campaign event.
18 **WO Class**—Enter the work order class for the campaign event. The system automatically populates **WO Class Org.**

19 **Duration**—Enter a duration for the work order for the campaign event.

20 **Problem Code**—Enter the code to identify the type of problem.

21 **Safety**—Select if this campaign event requires special safety precautions.

22 **Trade**—Enter the trade required to perform the activity.

23 **Task**—Enter the task code for the activity.

24 **Material List**—Enter the material list code for the material list containing the parts needed for the work order.

25 **Estimated Hours**—Enter the estimated number of hours required to complete the activity.

26 **People Required**—Enter the number of people required to perform the activity.

27 **Activity Duration**—Enter a duration for the activity for the campaigning event.

28 Click **Submit**.

### Managing equipment for campaigns

Manage equipment for campaigns on the Equipment page of the Campaigns form by adding, editing, deleting, or marking equipment for a campaign. Mark equipment as passed, failed, or not evaluated.

In addition to managing equipment on the Equipment page of the Campaigns form, drive the campaign process by creating campaign work orders, generating survey work orders, or clearing survey work orders.

### Adding equipment to campaigns

To add equipment to campaigns:

1. Open the **Campaigns** form.
2. Select a campaign for which to add equipment, and then click the **Equipment** tab.
3. Click **Select Equipment**.
4. **Select**—Select the equipment to add to a campaign, and then click **OK**.

   *Note:* To generate survey work orders for equipment, select the Equipment, click **Select**, and then click **Generate Survey WO**.

   To generate work orders for equipment, select the equipment, click **Select**, and then click **Generate WO(s)**.

   To clear survey work orders for equipment, select the equipment, click **Select**, and then click **Clear Survey WO**.

   To clear errors, select the equipment, click **Select**, and then click **Clear Error(s)**.
Marking equipment for campaigns

Mark equipment as having passed the survey work order, failed the survey work order, or not evaluated on the survey work order.

**Note:** Campaign Status must be Active before the system allows marking equipment for a campaign.

To mark equipment after survey work orders are completed for equipment on campaigns:

- **Select**—Select the equipment to mark for a campaign after a survey work order, and then choose one of the following options:
  - To mark equipment as passed—click Mark as Passed.
  - To mark the equipment as failed—click Mark as Failed.
  - To mark the equipment as not evaluated—click Mark as Not Evaluated.

Generating work orders for campaigns

Generate regular, multi-equipment, or survey type, campaign work orders from selected equipment and campaign events on the Equipment page of the Campaigns form. See the steps below to generate regular, multi-equipment, or survey type, campaign work orders.

To generate work orders or multiple equipment work orders for campaigns:

1. Open the Campaigns form.
2. Select a campaign for which to generate a work order, and then click the Equipment tab.
3. **Select**—Select the equipment for which to generate a campaign work order, and then click Generate Survey WO.
4. **Campaign Event**—Enter the campaign event for which to generate a work order. The system automatically populates the campaign event description.
5. **Create Multiple Equipment WO**—Select to generate multiple equipment work orders for the selected campaign event.
6. **Include Campaign Comments**—Select to include comments on the work order generated for the campaign.
7. **Include Campaign Documents**—Select to include documents on the work order generated for the campaign.
8. **Equipment**—Enter the equipment for which to perform work. The system automatically populates the equipment description and Equip. Org.
9. **Status**—Select the status of the work order generated for the campaign.
10. **Sched. Start Date**—Enter a scheduled start date for the work to be performed.
11. **Sched. End Date**—Enter a scheduled end date for the work to be performed.
12. Click Submit.

Generating survey work orders for campaigns

To generate survey work orders for campaigns:
Project management

1 Open the **Campaigns** form.
2 Select a campaign for which to generate a work order, and then click the **Equipment** tab.
3 **Select**—Select the equipment for which to generate a campaign work order, and then click **Generate Survey WO**.
4 **Campaign Event**—Enter the campaign event for which to generate a survey work order. The system automatically populates the campaign event description and selects Survey.
5 **Create Multiple Equipment WO**—Select to generate multiple equipment work orders for the selected campaign event.
6 **Include Campaign Comments**—Select to include comments on the survey work order generated for the campaign.
7 **Include Campaign Documents**—Select to include documents on the survey work order generated for the campaign.
8 **Equipment**—Enter the equipment for which to perform survey work. The system automatically populates the equipment description and **Equip. Org**.
9 **Status**—Select the status of the work order generated for the campaign.
10 **Sched. Start Date**—Enter a scheduled start date for the survey work to be performed.
11 **Sched. End Date**—Enter a scheduled end date for the survey work to be performed.
12 Click **Submit**.

Viewing work orders for campaigns

View the list of existing work orders for a specific campaign.

To view work orders for campaigns:

1 Open the **Campaigns** form.
2 Select the campaign for which to view work orders, and then click the **Work Orders** tab.
3 View the work orders.

Copying campaigns

Copy child records of campaigns and campaign header information to a new campaign.

To copy campaign records to new campaigns:

1 Open the **Campaigns** form.
2 Select the campaign for which to copy, and then click the **Record View** tab.
3 Click **Copy Campaign**.
4 **New Campaign**—Enter a unique code identifying the new campaign, and then enter a description for the new campaign in the adjacent field.
5 **Custom Field Value**—Select to copy the custom field values to the new campaign.
6 User Defined Fields—Select to copy the user defined fields to the new campaign.
7 Campaign Events—Select to copy the campaign events to the new campaign.
8 Equipment—Select to copy the equipment to the new campaign.
9 Comments—Select to copy the comments to the new campaign.
10 Documents—Select to copy the documents to the new campaign.
11 Click Submit.

Printing the project summary chart

Print the project summary chart report to view costs associated with a specific project.
To print the project summary chart:
1 Open the Projects form.
2 Select the project for which to print the project summary chart, and then click the Project Summary Chart tab.
3 View the chart.
Reports

Specify report parameters and generate reports for the various modules within Infor EAM.

Generating reports

Generate reports from the menu bar. For most reports, the system displays a Parameters page in which you enter selection criteria for the report. Some reports also include Fields and Group/Sort Order pages in which you specify the way reports appear, similar to the system's Dataspy.

Reports are available in Adobe Acrobat format (PDF). The Acrobat file provides a preview of the report before running and enables you to print to your local printer.

Note: Infor EAM reports do not support numbers with more than 16 digits.

Specifying report parameters

Select the basic report parameters, options, and date range criteria before generating reports.

To specify report parameters:

1. Open the report to generate.
2. Enter the Report Parameters, Report Options, and Date Range criteria for the report as necessary.
3. Mark Confidential—Select to print a confidential banner in the title of the report.
   
   Note: To preview the report without updating the database, click Preview Report.

4. Click Print Record.

Specifying report fields layout

Select the fields to display on the report, and then specify the order in which the fields will be displayed.
To specify report fields layout:

1. Open the report to generate.
   
   **Note:** This functionality is applicable to four reports only:
   
   - PO Status
   - Databridge Message Status
   - Databridge Message Status Summary
   - WO Statistics

2. Click the **Fields** tab.
   
   *Available Fields* lists all fields that are available but not visible in the report, while *Visible Fields* lists all fields currently displayed in the report.

3. See the following table when specifying the report layout:

<table>
<thead>
<tr>
<th>Function</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a field</td>
<td>Select the field in <em>Available Fields</em>, and then click <strong>Add a field</strong>.</td>
</tr>
<tr>
<td>Remove a field</td>
<td>Select the field in <em>Visible Fields</em>, and then click <strong>Remove a field</strong>.</td>
</tr>
<tr>
<td>Add all fields</td>
<td>Click <strong>Add all fields</strong>.</td>
</tr>
<tr>
<td>Remove all fields</td>
<td>Click <strong>Remove all fields</strong>.</td>
</tr>
<tr>
<td>Reorder fields</td>
<td>Select the field in <em>Visible Fields</em>, and then click either <strong>Reorder up</strong> or <strong>Reorder down</strong> to move the field up or down in the order.</td>
</tr>
</tbody>
</table>

### Specifying report sort order

Select the order in which to sort report information.

To specify report sort order:

1. Open the report to generate.
2. Click the **Group/Sort Order** tab.
3. **1st**—Select the first field by which to sort the report.
4. Choose one of the following sort orders:
   
   - Sort records either alphabetically or numerically by the selected field (ascending)—Click **Sort Ascending**.
   - Sort records in either reverse alphabetical or reverse numerical order by the selected field (descending)—Click **Sort Descending**.
5. Enter additional fields by which to sort as necessary.
**Note:** To remove sort criteria, choose the --No Sort-- selection from the drop-down list.

### Specifying report group order

Select the order in which to group report information.

To specify report group order:

1. Open the report to generate.
2. Click the **Group/Sort Order** tab.
3. **1st**—Select the first field by which to group the report.
4. Enter additional fields by which to group as necessary.

**Note:** To remove group criteria, choose the --No Grouping-- selection from the drop-down list.

### Saving report parameters

Save parameters for any report in which you enter parameter, field layout, and group/sort order criteria.

**Note:** Infor EAM reports do not support numbers with more than 16 digits.

Follow these steps to save report parameters.

1. Open the report to generate.
2. Enter the report Parameters, Fields, and Group/Sort Order criteria for the report as necessary.

**Note:** The system does not save the values for **Mark Confidential**.

3. Click **Save**.
4. Choose one of the following options:
   - **Save the report parameters as the default parameters for the report**—Enter the **Name** of the saved parameters, and then select **Default**.
   - **Save the report parameters without setting them as the default parameters for the report**—Enter the **Name** of the saved parameters.
5. Click **Submit**.

### Retrieving saved report parameters

Retrieve previously saved parameter, field layout, and group/sort order information for any report in which you entered selection criteria.
Follow these steps to retrieve saved report parameters.

1. Open the report to generate.
2. **Parameter List**—Select the saved selection parameters. The system retrieves the saved selection criteria to the report screen.

Deleting saved report parameters

Delete previously saved parameter, field layout, and group/sort order information for any report in which you entered selection criteria.

To delete saved report parameters:

1. Open the report to generate.
2. **Parameter List**—Select the saved selection parameters to delete. The system retrieves the saved selection criteria to the report screen.
3. Click **Delete**.
4. Click **Yes**.

Asset reports

Generate reports related to asset functions.

Annual energy reduction comparison

**Description**

Print the annual energy reduction comparison report.

**Menu Path**

Equipment > Reports > Asset Sustainability > Annual Energy Reduction Comparison

**Parameters**

Enter **Equipment**, **Organization**, and **Ending Year (YYYY)** for the report.

**Note:** The starting year for the report is always the year preceding **Ending Year (YYYY)**.

**Report Type**

Consumer
Annual energy use

Description
Displays the annual energy usage report for a number of years as specified in the report parameters.

Menu Path
Equipment > Reports > Asset Sustainability > Annual Energy Use

Parameters
Enter the Equipment and Organization.
No. of Years—Enter the number of years for which to run the report.

Report Type
Consumer

Asset failures by service life

Description
Print the asset failures by service life report.

Menu Path
Equipment > Reports > Asset Failures by Service Life

Parameters
Enter Equipment, Organization, Class, Category, Primary Closing Code, and Secondary Closing Code.

Plot Points Time Frame—Choose one of the following options:
• Month—Select to group the asset records by Service Life % month.
• Year—Select to group the asset records by Service Life % year.

Report Type
Basic
Calibration equipment

Description
Displays a list of all equipment that requires calibration and has been configured for calibration. The report includes all equipment that is defined as a loop, instrument, or standard if any one of these requires calibration. Standards are either parts tracked by asset or parts tracked by lot. The system only prints part standards that are tracked by asset, because you do not have to associate a piece of equipment with parts tracked by lot.

The System field in the report output displays all of the systems above the selected System/Equipment in an equipment hierarchy. If the selected System/Equipment has more than one parent in a hierarchy, the system displays each parent and separates each code with a forward slash (/), e.g., SYS1/SYS2/SYS3.

Additionally, if the equipment tolerance is a percentage rather than an absolute, the system designates the tolerance as a percentage by printing a percent sign (%) following the devices to and from tolerance.

Menu Path
Equipment > Reports > Calibration Equipment

Parameters
Enter the Organization, Department, System, Class, Category, Equipment Criticality, and Status.

Select one or more of the following options:
• Include in Service—Select to print a list of all calibration equipment that is currently in service.
• Include Out of Service—Select to print a list of all calibration equipment that is currently out of service.
• Include Withdrawn—Select to print a list of calibration equipment that is withdrawn.
• Include Calibration Specifications—Select to print the calibration specifications entered for each piece of calibration equipment on the Calibration page and Test Points page of the Assets, Positions, and Systems forms.

Order By—Select to order by Department or Equipment.

Report Type
Consumer

Calibration history

Description
Displays a list of calibration work order results for calibration work orders for which the completion date falls within the specified start and end date. The results shown for each work order will be related to test points having the greatest deviation from the standard.
The **System** field in the report output displays all of the systems above the selected System/Equipment in an equipment hierarchy. If the selected System/Equipment has more than one parent in a hierarchy, the system displays each parent and separates each code with a forward slash (/), e.g., SYS1/SYS2/SYS3.

Additionally, if more than one standard is used for the work order, the system prints each standard and its due date or lot expiration date on a separate line.

**Menu Path**

Equipment > Reports > Calibration History

**Parameters**

Enter the **Organization**, **Equipment**, **Department**, **System**, **Class**, **Category**, and **Equipment Criticality**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data. **End Date** is a required field.

**Report Type**

Consumer

---

**Capital performance evaluation**

**Description**

Displays for the selected equipment the outstanding capital request values for the selected period and for the future period and, if applicable, the GAS (Global Asset Sustainability) index for the equipment. This report also displays the correlation between the GAS index and the capital request.

**Menu Path**

Equipment > Reports > Capital Performance Evaluation

**Parameters**


**Note:** **Request Amount Minimum** selects requests where the estimated material cost plus the estimated labor cost is greater than the minimum entered.

**GAS Tracked Equipment**—Select to include GAS-tracked equipment in this report.

**Green Related Request**—Select to include green-related requests in this report.

**Sort By**—Select to sort by **GAS Cost**, **Return Amount**, or **Return %**.

**Start Date** and **End Date**—Enter the starting and ending dates for which to retrieve data.
Report Type
Basic

CO2 analysis

Description
Displays CO2 reduction for equipment calculated for a specific date range. The reduction calculation can be based on the equipment efficiency (design versus actual) or on a comparison with last year's data.

Menu Path
Equipment > Reports > CO2 Analysis

Parameters
Enter the Organization, Commodity, Equipment, Class, and Category.

Max No. of Records—Enter the maximum number of equipment records to display.

Min Reduction %—Enter the minimum reduction percentage. The system displays the reduction % greater than or equal to this value.

Max Reduction %—Enter the maximum reduction percentage. The system displays the reduction % less than or equal to this value.

Bill Level Only—Select to include equipment for which Bill Level is checked.

Reduction % Based on Previous Year—Select to calculate the reduction percentage based on the previous year. The previous year can only be calculated if the selection period is equal to or less than one year.

Sort By—Select to sort by Best or Worst.

Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type
Basic

CO2 emissions

Description
Displays equipment (in graphical form) in best and worst order based on CO2 emissions for the selected year and compares the data with the previous two years.
Menu Path
Equipment > Reports > CO2 Emissions

Parameters
Enter the Organization, Equipment, Commodity, and Reporting Year.

Report Type
Basic

CO2e emissions by greenhouse gas

Description
Print the CO2e emissions by greenhouse gas report.

Menu Path
Equipment > Reports > Asset Sustainability > CO2e Emissions by Greenhouse Gas

Parameters
Enter Equipment, Organization, and Commodity.
Select Start Date and End Date for the calendar year of the report.

Report Type
Consumer

Cost of WOs per equipment

Description
Displays a list of work order costs per piece of equipment.

Menu Path
Equipment > Reports > Cost of WOs Per Equipment

Parameters
Enter the Organization, Type, Equipment, Department, and Reporting Currency.
Date From and Date To—Enter the starting and ending date for which to retrieve data.
Report Type
Consumer

Downtime tracking report

Description
Displays a list of all work orders and/or equipment where Downtime Costs or Hours exist on the header.

Menu Path
Equipment > Reports > Downtime Tracking

Parameters
Enter the Equipment, Department, Assigned To, Priority, and Organization.

Start Date—Enter the date to begin tracking the downtime for the equipment.
End Date—Enter the date to end tracking the downtime for the equipment.

Report Type
Basic

Energy Star ratings chart

Description
Print the energy star ratings chart report.

Menu Path
Equipment > Assets > Energy Star Ratings Chart
Equipment > Positions > Energy Star Ratings Chart
Equipment > Systems > Energy Star Ratings Chart

Parameters
Enter the Equipment and Organization.

Start Date and End Date—Enter the starting and ending dates for which to retrieve data.
Report Type
Consumer

Equipment depreciation

Description
Displays a report of the total equipment depreciation expense and book value through the End Date.

Depending on the selection criteria entered, the system includes all equipment records with a depreciation schedule of the selected Depreciation Type for which an Original Cost is specified that does not have a Transfer Date.

If a piece of equipment is sold/scrapped, the system determines whether the Sold/Scrapped Date is prior to the report End Date. If so, then the system displays the depreciation expense for the equipment through the Sold/Scrapped Date and a Book Value of zero.

If you specify a future date as the End Date for the report, the system generates a report of the actual depreciation expense/book value through the current system date, as well as the projected depreciation expense/book value through the specified End Date.

If the depreciation method for a piece of equipment is units of output, the system generates a report of the most recent depreciation expense/book value that is presently available based on the current system date and units of output entered.

Menu Path
Equipment > Reports > Equipment Depreciation

Parameters
Enter the Organization, Equipment, Type, Equipment Class, Category, Department, Profile, Status, Location, Assigned To, Cost Code, Reporting Currency, and Depreciation Type.

Sort By—Select to sort by Organization, Department, or Equipment Class.

End Date—Enter the ending date for which to retrieve data.

Report Type
Consumer

Equipment hierarchies

Description
Displays a list of equipment hierarchies.
Reports

Menu Path
Equipment > Reports > Equipment Hierarchies

Parameters
Enter the Organization, Parent Equipment Type, Parent Equipment, and Child Equipment Type.

Report Type
Consumer

Equipment history

Description
Details the date and reason work was performed on a piece of equipment or an equipment type.

Menu Path
Equipment > Reports > Equipment History

Parameters
Enter the Organization, Equipment Type, Equipment, Location, Problem Code, Failure Code, Cause Code, Action Code, and Work Order.

Show Costs—Select to show work order costs.

Show MEC Details—Select to display MEC work order details for multiple equipment work orders.

Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Equipment performance by cost chart

Description
Displays a graph that calculates the top 10 equipment with the greatest total work order costs for the selected dates.

Menu Path
Equipment > Reports > Equipment Performance by Cost Chart
Parameters
Enter Organization, Department, Class, Category, and Cost Code.

Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type
Consumer

Equipment performance by downtime chart

Description
Print the equipment performance by downtime chart.

Menu Path
Equipment > Reports > Equipment Performance by Downtime Chart

Parameters
Enter Equipment, Department, Assigned To, Priority, Organization, and Class.

Downtime By—Choose one of the following options:
• Hours—Select to group the asset records by downtime hours
• Cost—Select to group the asset records by downtime costs.

Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type
Consumer

Equipment transfer log

Description
Displays an overview of transferred equipment. If the transferred equipment has any child equipment, the system also prints an overview of the child equipment.

Menu Path
Equipment > Reports > Equipment Transfer Log

Parameters
Enter the Transfer No.
**Fault trend analysis**

**Description**
Details how often a piece of equipment failed and why.

**Menu Path**
Equipment > Reports > Fault Trend Analysis

**Parameters**
Enter the [Organization], [Class], [Category], [Location], [Type], [Equipment], [Number of Months], [Problem Code], [ActionCode], [Cause Code], and [Failure Code].

**Show Faults By**—Select to sort by [Problem Code], [ActionCode], [Cause Code], or [Failure Code].

**StartDate**—Enter the starting date for which to retrieve data.

**Report Type**
Basic

---

**GAS index analysis**

**Description**
Displays the GAS (Global Asset Sustainability) index and the energy efficiency of equipment over a selected period of time and reports how much money was spent on each commodity (electricity, gas, water, etc.) consumed by that equipment.

**Menu Path**
Equipment > Reports > GAS Index Analysis

**Parameters**
Enter the [Organization] and [Equipment].

**StartDate** and **EndDate**—Enter the starting and ending dates for which to retrieve data.

**Report Type**
Basic
List of categories per class

Description
Displays a list of equipment categories per class.

Menu Path
Equipment > Reports > List of Categories Per Class

Parameters
Enter the Organization, Class, and Category.

Report Type
Consumer

Hazard chart

Description
Print the hazard chart.

Menu Path
Equipment > Assets > Reliability Calculations

Note: You may also access this report on the Reliability Calculations tab of the Positions form.

Parameters
Enter H for Type to print the hazard chart.

Report Type
Consumer

List of classes

Description
Displays a list of classes.
Reports

Menu Path
Equipment > Reports > List of Classes

Parameters
Enter the Organization, Entity, and Class.

Report Type
Consumer

List of equipment

Description
Displays a list of equipment.

Menu Path
Equipment > Reports > List of Equipment

Parameters
Enter the Organization, Type, Equipment, Description, Class, Category, Location, Status, Department, and Assigned To.

Sort By—Select to sort by Equipment, Class, or Location.

Report Type
Consumer

List of equipment details

Description
Displays a list of equipment details.

Menu Path
Equipment > Reports > List of Equipment Details

Parameters
Enter the Organization, Type, Equipment, Status, Class, Category, Location, and Position.

Include All Child Equipment—Select to include all child equipment on the report.
**Group By**—Select to group by Type, Class, Category, or Department.

**Report Type**

Consumer

---

**Mean time between failures**

**Description**
Displays the average time between failures.

**Menu Path**
Equipment > Reports > Mean Time Between Failures

**Parameters**
Enter the Organization, Class, Category, Equipment Type, Equipment, and Location.

Show Faults By—Select to sort by Problem Code, Action Code, Cause Code, or Failure Code.

Date From and Date To—Enter the starting date and ending date for which to retrieve data.

**Report Type**
Basic

---

**Mean time between failures per equipment**

**Description**
Details why a piece of equipment needed work and the average time between failures.

**Menu Path**
Equipment > Reports > Mean Time Between Failures Per Equipment

**Parameters**
Enter the Organization, Class, Category, Equipment Type, Equipment, Location, Problem Code, Action Code, Cause Code, and Failure Code.

Show Faults By—Select to sort by Problem Code, Action Code, Cause Code, or Failure Code.

Date From and Date To—Enter the starting date and ending date for which to retrieve data.
Report Type
Basic

Meter history

Description
Displays meter information and meter readings by piece of equipment.

Menu Path
Equipment > Reports > Meter History

Parameters
Enter the Organization, Class, Category, Location, Type, Equipment, Status, and Department.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

PM repair costs chart

Description
Prints the PM work order repair costs chart report.

Menu Path
Equipment > Assets > PM Repair Costs Chart

Note: You may also access this report on the PM Repair Costs Chart tab of the Positions and Systems forms.

Parameters
Enter the Equipment and Organization.
Enter the Start Date and End Date for which to retrieve the data.

Report Type
Consumer
Print maintenance pattern report

Description
Print a maintenance pattern record.

Menu Path
Work > Reports > Print Maintenance Pattern

Parameters
Enter Organization, Timeline Start Date, Timeline End Date, Maintenance Pattern, Class, Equipment, Equipment Type, Department, Equipment Class, Category, Cost Code, and Assigned To.

Select Include Sequence to include sequence details in the report.
Select Include Timeline to include timeline details in the report.
Select Include User Defined Fields to include user defined fields in the report.

Report Type
Consumer

Print reliability survey report

Description
Print the reliability survey report.

Menu Path
Equipment > Reports > Print Reliability Survey

Parameters
Reliability Ranking—Enter the reliability ranking for which to print survey reports.

Report Type
Consumer
Reliability calculations

Description
Print the reliability calculations chart.

Menu Path
Equipment > Assets > Reliability Calculations

Note: You may also access this report on the Reliability Calculations tab of the Positions form.

Parameters
Enter the Type, Problem Code, Failure Code, Cause Code, Action Code, Sequence Number, Start Day, and Scale Multiplier.

Report Type
Consumer

Reliability chart

Description
Print the reliability chart.

Menu Path
Equipment > Assets > Reliability Calculations

Note: You may also access this report on the Reliability Calculations tab of the Positions form.

Parameters
Enter the Type, Problem Code, Failure Code, Cause Code, Action Code, Sequence Number, Start Day, and Scale Multiplier.

Report Type
Consumer

Table of equipment with custom fields

Description
Displays a table of the technical details of equipment.
Menu Path
Equipment > Reports > Table of Equipment with Custom Fields

Parameters
Enter the Organization, Type, Equipment, Description, Class, Category, Location, Custom Field, Value, Text, and Department.

Report Type
Consumer

Total annual energy use

Description
Displays the annual energy usage report for one year as specified in the report.

Menu Path
Select Equipment > Reports > Asset Sustainability > Total Annual Energy Use.

Parameters
Enter the Equipment and Organization.
Year (YYYY)—Enter the specific year for which to retrieve the data.

Report Type
Consumer

Unreliability chart

Description
Print the unreliability chart.

Menu Path
Equipment > Assets > Reliability Calculations

Note: You may also access this report on the Reliability Calculations tab of the Positions form.

Parameters
Enter U for Type to print the unreliability chart.

**Report Type**
Consumer

**Warranty claims**

**Description**
Displays a list of claims filed against an equipment warranty.

**Menu Path**
Equipment > Reports > Warranty Claims

**Parameters**
Enter the Organization, Claim, Supplier, Equipment, Status, Warranty, System Level, Assembly Level, and Component Level.

**Summary**—Select to print the warranty summary.

**Settlement Details**—Select to print closing details.

**Filed Date**—Select to print the filed date.

**Activities**—Select to print work order activities.

**Sort By**—Select to sort by Supplier, Equipment, or Warranty.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Basic

**Warranty claim vs. settlement chart**

**Description**
Before you can set the parameters to generate the warranty claim vs. settlement chart, you must update the system Status of the warranty claim to Response Received. The system does not display this status as an option until the warranty claim has been given a system Status of Approved. See "Entering settlement details for warranty claims" on page 118.
**Menu Path**
Equipment > Warranty > Warranties > Warranty Claim vs. Settlement Chart

**Parameters**

**Start Date** and **End Date**—Enter the starting and ending dates for which to retrieve data.

**Report Type**
Consumer

---

**Weekly booked hours by department**

**Description**
Print equipment details for a piece of equipment, with the option to print a list of work orders, PM schedules and parts associated to the equipment.

**Menu Path**
Work > Reports > Weekly Booked Hours by Department

**Parameters**
Enter the Department, Employee, and Organization.

Enter the Start Date for the report.

**Report Type**
Consumer

---

**Work order repair costs chart**

**Description**
Prints the work order repair costs chart report.

**Menu Path**
Equipment > Assets > Work Order Repair Costs Chart

**Note:** You may also access this report on the Work Order Repair Costs Chart tab of the Positions and Systems forms.
**Parameters**
Enter the **Equipment** and **Organization**.
Enter the **Start Date** and **End Date** for which to retrieve the data.

**Report Type**
Consumer

**WO cost by equipment**

**Description**
Includes a list of work order costs per piece of equipment.

**Menu Path**
Equipment > Reports > WO Cost by Equipment

**Parameters**
Enter the **Organization**, **Type**, **Equipment**, **Department**, **Class**, **Category**, **Location**, **Minimum Cost**, and **Reporting Currency**.

**Applicable Exchange Rate**—Select one of the following options:

- **Actual**—Select to calculate the conversion based on the exchange rate on the work order’s creation date.
- **Current**—Select to calculate the conversion based on the active exchange rate.

The system calculates the conversions on the printed report.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Basic

**WO cost by type, cost code, or dept**

**Description**
Includes a list of work order costs by work order type, cost code, or department.

**Menu Path**
Equipment > Reports > WO Cost by Type, Cost Code, or Dept
Parameters

Enter the **Organization**, **Cost Code**, **Department**, and **WO Type**.

**Show Costs By**—Select to sort by **Department**, **Cost Code**, or **WO Type**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

**Report Type**

Basic

WO cost of equipment per location

**Description**
Displays a list of equipment costs per location.

**Menu Path**

Equipment > Reports > WO Cost of Equipment Per Location

**Parameters**

Enter the **Organization**, **Location Class**, and **Location**.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.

**Report Type**

Consumer

WO cost summary

**Description**
Includes itemized and total cost information (labor, materials, services, and tool costs) by equipment for open and closed work orders.

**Menu Path**

Equipment > Reports > WO Cost Summary

**Parameters**

Reports

Current Exchange Rate—Select to calculate the conversion based on the active exchange rate. Otherwise, the system calculates the conversion based on the exchange rate on the work order’s creation date. The system calculates the conversions on the printed report.

Show Child Equipment—Select to show work order costs for children of the selected Equipment. The system includes only the children for which costs roll up to the parent.

Note: You can select Show Child Equipment only if Equipment is entered.

Show Details—Select to display the work order details in addition to the work order cost information.

Group By—Select to group by Location, Department, Cost Code, Equipment, or Trade.

StartDate and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Asset management services reports
Generate reports related to asset management services functions.

Print customer charges

Description
Displays a list of work order charges that are the responsibility of the customer.

Menu Path
Work > Reports > Asset Management Services > Print Customer Charges

Parameters
Enter the Organization, Work Order, Customer, Department, Equipment, and Project.

Completed Work Orders—Select to include completed work orders only.

Released Work Orders—Select to include released work orders only.

Both—Select to include completed and released work orders.

Completed From and Completed To—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer
Print customer contract

**Description**
Prints a contract for a specific customer.

**Menu Path**
Work > Reports > Asset Management Services > Print Customer Contract

**Parameters**
Enter the **Organization**, **Customer Contract**, and **Customer**.

**Pricing Schedules**—Select to display pricing schedules on the report.

**Arranged WO Types**—Select to display arranged work order types.

**Custom Tariffs/Part Charges**—Select to display custom tariffs and part charges if **Custom Trade Rates** and **Custom Part Charges** are selected on the related Pricing Schedule Record View page.

**Related Customer Contracts**—Select to display unfinished/approved related customer contracts on the report.

**Fixed Payments**—Select to display fixed payments on the report

**Calculated Work Orders**—Select to display calculated work orders on the report.

**Report Type**
Consumer

Print invoice

**Description**
Prints an invoice for a specific customer and work order.

**Menu Path**
Work > Reports > Asset Management Services > Print Invoice

**Parameters**
Enter the **Organization**, **Invoice**, **Customer**, **Work Order**, and **Status**.

**Report Type**
Consumer
Budget reports
Generate reports related to budget functions.

Budget analysis

Description
Displays all work orders that are associated with the selected budget along with actual, estimated, and remaining parts, labor, and tool costs.

Menu Path
Operations > Reports > Budgets > Budget Analysis

Parameters
Enter the Organization, Budget Structure, Budget Term, Cost Type, Cost Status, Period From, Period To, Department, Department Group, WO Location, WO Location Group, Equipment, Equipment Group, WO Type, WO Type Group, Cost Code, Cost Code Group, Project, and Project Group.

Report Type
Basic

Budget position details

Description
Displays totals for each budget detail.

Menu Path
Operations > Reports > Budgets > Budget Position Details

Parameters
Enter the Budget Structure, Budget Term, Period, WO Location, WO Location Group, Department, Department Group, Equipment, Equipment Group, WO Type, WO Type Group, Cost Type, Cost Type Group, Cost Code, Cost Code Group, Project, and Project Group.

Show Total (Or Positions)—Select to display remaining planned and on-order amounts. Unselect to display actual planned and on-order amounts.

Free Budget—Select to sort by Spent, On Order, Planned, or All.
Report Type
Consumer

Budget summary

Description
Displays the calculated estimated, actual, and remaining costs for a selected budget.

Menu Path
Operations > Reports > Budgets > Budget Summary

Parameters
Enter the Organization, Budget Structure, and Budget Term.

Report Type
Basic

Budgets consistency control

Description
Tracks budget inconsistencies. Displays data for all structure levels.

Menu Path
Operations > Reports > Budgets > Budgets Consistency Control

Parameters
Enter the Budget Structure and Budget Term.

Report Type
Consumer
List of budget structure codes

Description
Displays the existing budget structures and a complete list of budget codes in the system.

Menu Path
Operations > Reports > Budgets > List of Budget Codes

Parameters
Enter the Organization.

Report Type
Consumer

List of budgets (lower level)

Description
Displays budget details for a particular budget.

Menu Path
Operations > Reports > Budgets > List of Budgets (Lower Level)

Parameters
Enter the Budget Structure, Budget Term, Period, WO Location, WO Location Group, Department, Department Group, Equipment, Equipment Group, WO Type, WO Type Group, Cost Type, Cost Type Group, Cost Code, Cost Code Group, Project, and Project Group.

Report Type
Consumer

List of budgets (top level)

Description
Displays an overview of the actual amounts for a budget period.
Menu Path
Operations > Reports > Budgets > List of Budgets (Top Level)

Parameters
Enter the Budget Structure and Budget Term.

Report Type
Consumer

Calibrations reports
Generate reports related to calibrations functions.

Calibration analysis

Description
Displays a list of completed calibration work orders by department that have resulted in the specified minimum number of consecutive or non-consecutive calibration statuses of pass or fail.

The report allows you to identify patterns in the results of calibration work orders to determine whether the frequency of calibration PMs should be adjusted, whether the equipment should be replaced, etc.

Using Min. # of Calibrations, the system determines the actual number of completed calibration work orders to retrieve for the report. If the actual number of completed calibration work orders is less than the value specified for Min. # of Calibrations, the system does not display any results. However, if the number of completed work orders is greater than or equal to the value of Min. # of Calibrations, the system displays all of the work orders.

Calibration work orders are considered consecutive if there are no other work orders for the equipment containing test points that were completed between the work orders in question.

Menu Path
Work > Reports > Calibrations > Calibration Analysis

Parameters
Enter the Organization, Department, System, Equipment, Class, Category, and Equipment Criticality.

Min. # of Calibrations—Enter the minimum number of work orders to retrieve for each piece of equipment based on the selection criteria. Min. # of Calibrations is a required field.
Select one or more of the following options:

- **Non-Consecutive**—Select to print a list of all calibration work orders. If **Non-Consecutive** is unselected, the system only prints a list of consecutive work orders meeting the specified criteria.
- **Include Pass With Fail**—Select to include all work orders with a calibration status of Pass, fail exists (PF).
- **Include Pass With Recal**—Select to include all work orders with a calibration status of Pass, recal exists (PR).
- **Include Incomplete**—Select to include all work orders with a calibration status of Incomplete.
- **Print Test Point Comments**—Select to print comments entered for test points in the report output.

**Calibration Status**—Select one of the following options:

- **Pass**—Select to include only work orders with a status of Pass (P).
- **Fail**—Select to include only work orders with a status of Fail (F).

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data. **End Date** is a required field.

**Report Type**

Consumer

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**Calibration due report**

**Description**

Displays a list of all open calibration work orders containing test points for which the planned completion date is less than or equal to the **Due By** date.

The system calculates the planned completion date of a work order using the following formula:

\[
\text{Planned completion date} = (\text{Target date} + \text{Duration}) - 1
\]

If you select to include backlogged work orders, the system displays the number of days late for each work order in the report output. The system calculates the number of days late using the following formula:

\[
\text{Days late} = \text{System date} - \text{Planned completion date}
\]

The **System** field in the report output displays all of the systems above the selected System/Equipment in an equipment hierarchy. If the selected System/Equipment has more than one parent in a hierarchy, the system displays each parent and separates each code with a forward slash (/), e.g., SYS1/SYS2/SYS3.

**Menu Path**

Work > Reports > Calibrations > Calibration Due Report
Parameters

Enter the Organization, Department, System, Equipment, Class, Category, Equipment Criticality, and Assigned To.

No Backlog—Select to not print work orders whose planned completion date is less than today’s date.

Show MEC Details—Select to display MEC work order details for multiple equipment work orders.

Sort By—Select to sort by Planned Comp. Date or Equipment.

Due By—Enter the due date for the calibration. Due By is a required field.

Report Type

Consumer

Calibration record report

Description

Displays a calibration record that includes calibration header information, such as the work order and equipment. The body of the report is printed in a tabular format that includes the loop instruments, test points, standards used, potential standards, work order comments and custom fields, and any equipment custom fields for the calibration work order.

The report enables you to print a document to serve as a guide for the technician performing the calibration and also as a document on which to record the actual results of the calibration process. The report also provides an area on which to record performed by and approved by signatures.

After completing the calibration, transfer the information recorded on the document during the calibration process into the system to maintain an electronic record of the calibration, and then store the printed document in a secure location to keep a printed record of the equipment calibration.

Menu Path

Work > Reports > Calibrations > Calibration Record Report

Parameters

Enter the Organization, Work Order, Department, PM Schedule, Equipment, Type, Equipment Criticality, Location, Trade, Status, Assigned To, Assigned By, Person Responsible, and System.

Select one or more of the following options:

• Scheduled Date Range—Select to print a list of all calibration work orders for a scheduled date range.

• Reprint—Select to reprint a list of all calibration work orders that have already been printed.

• Include Activities—Select to include all work order activities for all the work orders included in the report output.

• Work Order Custom Fields—Select to include all work order custom fields that have been set up to print on work orders for all the work orders included in the report output.
Reports

- **Equipment Custom Fields**—Select to include all equipment custom fields for all the equipment on the work orders included in the report output.
- **By Person Responsible**—Select to sort the report output by the person responsible.
- **Search MEC WOs**—Select to search multiple equipment work orders.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Consumer

**Calibration reverse traceability**

**Description**
Displays a list of calibration work orders, including all test points on the work order, for which a selected standard has been used to calibrate a piece of equipment. The completion date of the work orders must fall within the specified start and end date.

When the standard used for calibration is out of tolerance, it is necessary to identify the equipment that has been calibrated with the out of tolerance standard.

The system also enables you to print work orders for which test point deviations are greater than or equal to the specified deviation.

The **System** field in the report output displays all of the systems above the selected System/Equipment in an equipment hierarchy. If the selected System/Equipment has more than one parent in a hierarchy, the system displays each parent and separates each code with a forward slash (/), e.g., SYS1/SYS2/SYS3.

**Menu Path**
Work > Reports > Calibrations > Calibration Reverse Traceability

**Parameters**
Enter the **Organization**, **Equipment**, **Part**, **Lot**, **Department**, **Deviation**, and **UOM**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data. **End Date** is a required field.

**Report Type**
Consumer
Call Center reports
Generate reports related to call center functions.

Customer request

Description
Prints a copy of a customer request.

Menu Path
Operations > Reports > Call Center > Customer Request

Parameters
Enter the Customer Request, Status, Assigned To, Customer, Employee, Department, Provider, Service Category, Service Problem Code, and Equipment.

Customer Information—Select to display the customer's information on the report.

Action Requests—Select to include any action requests on the report.

Remarks—Select to print the customer's remarks on the report.

Custom/WO Custom Fields—Select to include all custom fields and work order custom fields on the report.

Request Date and Promise Date—Enter the requested date and the promised date for the customer's request.

Report Type
Consumer

Knowledge base articles

Description
Prints knowledge base articles for call center employees.

Menu Path
Operations > Reports > Call Center > Knowledge Base Articles
**Parameters**
Enter the Organization, Knowledge Base Article, Status, Language, Department, Provider, Service Category, and Service Problem Code.

**Report Type**
Consumer

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**Penalty deduction detail**

**Description**
Displays penalty deduction details for work orders.

**Menu Path**
Operations > Reports > Call Center > Penalty Deduction Detail

**Parameters**
Enter the Organization, Work Order, Equipment, Service Problem Code, and Provider.

**Include Work Order Custom Fields**—Select to include work order custom fields in this report.

**Include Service Problem Code Custom Fields**—Select to include service problem code custom fields in this report.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Consumer

---

**Penalty deduction summary**

**Description**
Displays a penalty deduction summary for equipment.

**Menu Path**
Operations > Reports > Call Center > Penalty Deduction Summary

**Parameters**
Enter the Organization, Work Order, Equipment, and Service Problem Code.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.
Report Type
Consumer

Contract reports
Generate reports related to contract functions.

Contract classes

Description
Displays a list of the different contract classes.

Menu Path
Purchasing > Reports > Contracts > Contract Classes

Parameters
Enter the Organization, Contract Class, and Language.

Report Type
Consumer

List of debit discounts

Description
Prints a list of the debit discounts to expect.

Menu Path
Purchasing > Reports > Contracts > List of Debit Discounts

Parameters
Enter the Organization, Contract, Store, Supplier, and Status.

Report Type
Consumer
Reports

List of existing contracts

Description
Prints an overview of current contracts.

Menu Path
Purchasing > Reports > Contracts > List of Existing Contracts

Parameters
Enter the Organization, Supplier, and Store.

Report Type
Consumer

List of purchases under contract

Description
Displays a list of open purchase order lines.

Menu Path
Purchasing > Reports > Contracts > List of Purchases Under Contract

Parameters
Enter the Organization, Store, Supplier, and Contract.
Select to include All Lines or only Open Lines.

Report Type
Consumer

Print contract

Description
Prints a copy of the contract.

Menu Path
Purchasing > Reports > Contracts > Print Contract
Parameters
Enter the Organization, Contract, Supplier, and Store.

Report Type
Consumer

Request discount based on purchases

Description
Prints a request to a supplier for the discount based on the purchase orders in the contract period.

Menu Path
Purchasing > Reports > Contracts > Request Discount Based on Purchases

Parameters
Enter the Organization, Part, Description, For Store, Number of Months, Supplier, and Part Class.

Report Type
Consumer

Fleet reports
Generate reports related to fleet functions.

Fleet billing report

Description
Displays a list fleet customers and the corresponding bills for each.

Menu Path
Work > Reports > Fleet > Fleet Billing Report

Parameters
Enter the Organization, Fleet Customer, and Bill.
Include Details—Select to include detailed billing information.

Include Custom Fields—Select to include custom fields in this report.

Print No Charge Bills—Select to print bills that have no charges.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Vehicle ticket report

Description
Displays ticket information based on the fleet vehicle ticket.

Menu Path
Work | Reports | Fleet | Vehicle Ticket Report

Parameters
Enter the Organization, Ticket, Status, Type, Fleet Customer, Vehicle, Received Vehicle, Issued To, Cost Code, and Ticket Class.

Include PM Details—Select to print PM details.

Include Billing Details—Select to print billing details.

Print Custom Fields—Select to print custom fields.

Include Exceptions—Select to print exceptions.

Include Billing Adjustments—Select to print billing adjustments.

Print Attachments—Select to print document attachments associated with vehicle tickets in addition to the vehicle ticket.

Print Images—Select to print all images associated with the vehicle ticket.

Select Records By—Select to sort by Issued Date, Returned Date, or Completed Date.

Start Date and End Date—Enter the starting and ending date for which to retrieve data. Start Date and End Date are required fields.

Report Type
Consumer
VMRS activities

Description
Prints a list displaying activity details for VMRS work orders.

Menu Path
Work > Reports > Fleet > VMRS Activities

Parameters
Enter the Organization, Equipment, Trade, Department, Work Order, Status, Reason for Repair, Work Accomplished, Technician Part Failure, Manufacturer, System Level, Assembly Level, and Component Level.

Note: The values available for Assembly Level are based on the system-level code. The values available for Component Level are based on a combination of the system-level code and the assembly-level code.

Show MEC Details—Select to display MEC work order details for multiple equipment work orders.

Activity Start Date and Activity End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Healthcare reports
Generate reports related to healthcare functions.

Print healthcare work orders

Description
Includes details on equipment tracking, compliance, activities, and booked labor hours.

Menu Path
Work > Reports > Print Work Orders
Parameters
Enter Organization, Work Order, Department, PM Schedule, Type, Equipment, WO Type, Trade, Equipment Criticality, Status, Assigned To, Assigned By.
Start Date and End Date—Enter the starting date and ending date for which to print the report.
Include Instruction List—Select to include a list of instructions in the report.
Include Work Order Custom Fields—Select to include the custom fields from the work order in the report.
Include Work Order User Defined Fields—Select to include the user defined fields from the work order in the report.
Include Equipment Custom Fields—Select to include the custom fields from the equipment in the report.
Include Equipment User Defined Fields—Select to include the user defined fields from the equipment in the report.
Include Equipment Tracking Details—Select to include the equipment tracking details in the report.
Include Work Order Compliance Details—Select to include the work order compliance details in the report.
Print Attachments—Select to print files attached to the work order with the report. Attached files may originate from the following sources: the associated work order, equipment, projects, departments, parent work orders, and locations.
Print Images—Select to print all images associated with the work order.
Booked Hours—Select to print the booked hours section details in the report.
Report Type
Consumer

Equipment list detail-healthcare

Description
Print the equipment list details report for healthcare assets, medical equipment, fire and safety equipment, and utility systems.

Menu Path
Equipment > Reports > Equipment List Detail- Healthcare

Parameters
Enter the Organization, Equipment, Department, Status, Type, and Class.
Include Totals—Select to calculate and include totals for all numeric fields in the report.
Report Type
Consumer

Labor productivity-healthcare

Description
Print the labor productivity healthcare report.

Menu Path
Administration > Reports > Labor Productivity-Healthcare

Parameters
Enter the Organization, Employee, Trade, and Department.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.
Include Front Page—Select to include a front page with the report parameters selected.
Mark Confidential—Select to print a confidential banner in the title of the report.
Group By—Select to group the report data by None, Day, or Week.

Report Type
Basic

Medical equipment work orders by criticality

Description
Print the report detailing the work orders for medical equipment by criticality ratings. The report displays all work orders with PPM or JOB type.

Menu Path
Work > Reports > Medical Equipment Work Orders by Criticality

Parameters
Enter the Organization, Criticality, and Equipment Class.
Date From and Date To—Enter the dates for which to retrieve data.
Show Totals—Select to display subtotals and grand totals.
Report Type
Consumer

PM completion for life support equipment

Description
Print the report detailing the PM completion for life support equipment. The report displays all work orders with PPM type.

Menu Path
Work > Reports > PM Completion Report for Life Support Equipment

Parameters
Enter the Organization, Equipment Class, Equipment Category, and Criticality.

Date From and Date To—Enter the dates for which to retrieve data.

Show Totals—Select to display subtotals and grand totals.

Report Type
Consumer

Work order list-detail-healthcare

Description
Displays a list of all work orders where RTYPE is JOB or PPM. This report does not display multiple equipment child work orders.

Menu Path
Work > Reports > Work Order List-Detail

Parameters
Enter the Organization, Work Order, WO Type, Department, Status, , Equipment Type, Equipment Class, Equipment Category, Assigned To, Priority, Criticality, Action Code, Problem Code, Failure Code, and Problem Code.

Date From and Date To—Enter the dates for which to retrieve data.

Show Totals—Select to display subtotals and grand totals.
Report Type
Basic

Hospitality reports
Generate reports related to hospitality functions.

Actual labor hours against estimated - hospitality

Description
Displays a list displaying how much time was spent, per trade, on work during a specified time period versus the original estimate.

Menu Path
Work > Reports > Actual Labor Hours Against Estimated-Hospitality

Parameters
Enter the Property, and Profession.
Group By—Select one of the following options:
• None—Select to not group by day or week.
• Day—Select to group by day.
• Week—Select to group by week.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Annual energy use-hospitality

Description
Displays the annual energy usage report for a number of years as specified in the report parameters.

Menu Path
Equipment > Reports > Annual Energy Use-Hospitality
Parameters
Enter the Equipment and Property.
No. of Years—Enter the number of years for which to run the report.
Include Front Page—Select to include a front page with the report parameters selected.
Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type
Consumer

CO2 emissions-hospitality

Description
Displays equipment (in graphical form) in best and worst order based on CO2 emissions for the selected year and compares the data with the previous two years.

Menu Path
Equipment > Reports > CO2 Emissions

Parameters
Enter the Property, Equipment, Commodity, and Reporting Year.
Include Front Page—Select to include a front page with the report.
Mark Confidential—Select to print a confidential banner in the title of the report.
Display Graph in Gray Scale—Select to display the graph report in gray scale.

Report Type
Consumer

Capital performance evaluation-hospitality

Description
Displays for the selected equipment the outstanding capital request values for the selected period and for the future period and, if applicable, the GAS (Global Asset Sustainability) index for the equipment. This report also displays the correlation between the GAS index and the capital request.
Menu Path

Equipment > Reports > Capital Performance Evaluation-Hospitality

Parameters

Enter the Property, Equipment, Request Priority, Request Amount Minimum, Reporting Currency, Request Status, and GAS Index Evaluation Period (Days).

Note: Request Amount Minimum selects requests where the estimated material cost plus the estimated labor cost is greater than the minimum entered.

GAS Tracked Equipment—Select to include GAS-tracked equipment in this report.

Green Related Request—Select to include green-related requests in this report.

Sort By—Select to sort by GAS Cost, Return Amount, or Return %.

Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type

Consumer

Degree day analysis-hospitality

Description

Displays a list of degrees for a specified date range and degree codes. Select the Include History field when generating the report to display all historical data from the Historical Temperature page. This feature compares the actual temperature data against the historical temperature data.

Menu Path

Administration > Reports > Degree Day Analysis-Hospitality

Parameters

Enter Property and Region.

Include History—Select to include historical data to allow a comparison between the actual temperature data vs the historical temperature data.

Start Date and End Date—Enter the starting date and ending date for which to generate the report.

Include Front Page—Select to include a front page with the report.

Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type

Consumer
GAS index analysis-hospitality

Description
Displays the GAS (Global Asset Sustainability) index and the energy efficiency of equipment over a selected period of time and reports how much money was spent on each commodity (electricity, gas, water, etc.) consumed by that equipment.

Menu Path
Administration > Reports > GAS Index Analysis-Hospitality

Parameters
Enter the Property and Equipment.
Start Date and End Date—Enter the starting and ending dates for which to retrieve data.
Include Front Page—Select to include a front page with the report.
Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type
Consumer

Heating and cooling degree days vs. energy consumption type analysis-hospitality

Description
Displays the relationship between the heating and cooling degree days and energy consumption type.

Menu Path
Equipment > Reports > Degree Days vs. Energy Consumption Type-Hospitality

Parameters
Enter the Property, Commodity, Region, Start Date, and End Date.
Include Front Page—Select to include a front page with the report.
Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type
Consumer
Heating and cooling degree days vs. energy costs analysis-hospitality

Description
Displays the relationship between the heating and cooling degree days and energy costs.

Menu Path
Equipment > Reports > Degree Days vs. Energy Costs-Hospitality

Parameters
Enter Property, Commodity, and Region.
Start Date and End Date—Enter the starting date and ending date for which to generate the report.

Report Type
Consumer

Print hospitality work orders

Description
Includes details on equipment tracking, compliance, activities, and booked labor hours.

Menu Path
Work > Reports > Print Work Orders Healthcare

Parameters
Enter Organization, Work Order, Department, PM Schedule, Type, Equipment, WO Type, Trade, Equipment Criticality, Status, Assigned To, Assigned By.
Start Date and End Date—Enter the starting date and ending date for which to print the report.
Task Instructions—Select to include a list of instructions in the report.
Work Order Custom Fields—Select to include the custom fields from the work order in the report.
Work Order User Defined Fields—Select to include the user defined fields from the work order in the report.
Equipment Custom Fields—Select to include the custom fields from the equipment in the report.
Equipment User Defined Fields—Select to include the user defined fields from the equipment in report.
Equipment Tracking Details—Select to include the equipment tracking details in the report.
Reports

**Work Order Compliance Details**—Select to include the work order compliance details in the report.

**Print Attachments**—Select to print files attached to the work order with the report.

**Print Images**—Select to print all images associated with the work order.

**Booked Hours**—Select to print the booked hours section details in the report.

**Report Type**

Consumer

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### Incident response time chart-hospitality

**Description**

Displays a chart with calculations of the average response time for incident requests per problem code.

**Menu Path**

*Work > Reports > Incident Response Time Chart*

**Parameters**

Enter the **Property**, **From Status**, and **To Status**.

Enter the **Start Date** and **End Date** for which to retrieve the data.

**Report Type**

Consumer

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### Incident summary chart-hospitality

**Description**

Displays a chart with calculations of the number of incidents per property that occurred per month for the current year by selected groupings.

**Menu Path**

*Work > Reports > Incident Summary Chart*

**Parameters**

Enter the **Work Order**, **WO Priority**, **Status**, **Source**, **Room**, **Assigned To**, **First Name**, **LastName**, **VIP Status**, **Problem Code**, **Incident Details**, and **Property**.
Select one of the following options by which to group the report details:

- **Problem Code**—Select to group by problem code.
- **Incident Type**—Select to group by incident type.
- **Room**—Select to group by room.

Enter the **Start Date** and **End Date** for which to retrieve the data.

### Report Type

**Consumer**

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**WO backlog hospitality report**

**Description**

Displays a list of backlogged work orders.

**Menu Path**

Work > Reports > WO Backlog Report-Hospitality

**Parameters**

Enter the **Property**, **Department**, **Profession**, **Type**, **Equipment**, **PM**, **Facility**, **WO Type**, **Priority**, **Equipment Criticality**, **Status**, **Assigned To**, and **Scheduling Group**.

**Sort By**—Select to sort by **Start Date**, **Equipment**, or **Location**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

### Report Type

**Basic**

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**WO cost list-hospitality**

**Description**

Displays the costs of a work order.

**Menu Path**

Work > Reports > WO Cost List-Hospitality

**Parameters**

Enter the **Property** and **Work Order**.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

WO cost summary-hospitality

Description
Includes itemized and total cost information (labor, materials, services, and tool costs) by equipment for open and closed work orders.

Menu Path
Equipment > Reports > WO Cost Summary-Hospitality

Parameters
Enter the Property, Type, Equipment, Profession, Reporting Currency, Current Exchange Rate, WO Status, and Include WOs.

Current Exchange Rate—Select to calculate the conversion based on the active exchange rate. Otherwise, the system calculates the conversion based on the exchange rate on the work order’s creation date. The system calculates the conversions on the printed report.

Show Child Equipment—Select to show work order costs for children of the selected Equipment. The system includes only the children for which costs roll up to the parent.

Note: You can select Show Child Equipment only if Equipment is entered.

Show Details—Select to display the work order details in addition to the work order cost information.

Group By—Select to group by Equipment or Profession.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Inspection reports
Generate reports related to inspection functions.
Inspection route Report

Description
Displays the inspection sequences, aspects, conditions, and methods to examine during a specific route inspection. Use this report to register the results of an inspection for later data entry.

Menu Path
Work > Reports > Inspections > Inspection Route Report

Parameters
Enter the Organization, Work Order, Type, Equipment, Location, Department, PM, Class, Category, and Route.

Report Type
Consumer

List of inspection results

Description
Displays the results of an inspection for a particular piece of equipment.

Menu Path
Work > Reports > Inspections > List of Inspections Results

Parameters
Enter the Organization, Class, Category, Equipment Type, Equipment, Aspect, Point Type, Point, Finding, Standard Work Order, Result, Minimum Value, and Maximum Value.

Date From and Date To—Enter the starting and ending date by which to retrieve data. Date From and Date To are required fields.

Report Type
Consumer
List of points to be inspected

Description
Displays the inspection sequences, aspects, conditions, and methods to examine during a specific route inspection. Use this report to register the results of an inspection for later data entry.

Menu Path
Work > Reports > Inspections > List of Points to be Inspected

Parameters
Enter the Organization, Equipment Type, Equipment, Location, Department, Class, Category, PM, Route, and Aspect.

Date From and Date To—Enter the starting and ending date by which to retrieve data. Date From and Date To are required fields.

Report Type
Consumer

Status of inspection points

Description
Displays a list of inspection points and their statuses.

Menu Path
Work > Reports > Inspections > Status of Inspection Points

Parameters
Enter the Organization, Route, Work Order, PM, Equipment Type, Equipment, Location, Department, Class, Category, and Route Status.

Report Type
Consumer

Materials reports

Generate reports related to materials functions.
Average monthly usage analysis

Description
Displays part usage and demand information per store for the number of months requested.

Menu Path
Materials > Reports > Average Monthly Usage Analysis

Parameters
Enter the Organization, Store, Part, Part Description, Number of Months, Preferred Supplier, and Stock Class.

Report Type
Consumer

Consignment activity

Description
Displays a list of consignment activity.

Menu Path
Materials > Reports > Consignment Activity

Parameters
Enter the Organization, Store, and Supplier.

Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Goods received note

Description
Displays a goods received note.
Menu Path
Materials > Reports > Goods Received Note

Parameters
Enter the Organization, PO Receipt, Transaction Code, From, From Code, To, To Code, Purchase Requisition, Purchase Order, and Packing Slip.
Printed—Select to print transactions that have been previously printed.
Date—Enter the date for which to retrieve data.

Report Type
Basic

Goods return note

Description
Displays for each supplier, the supplier address and the list of goods returned. Displays all the approved return transactions grouped by the supplier and sorted by the order number.

Menu Path
Materials > Reports > Goods Return Note

Parameters
Enter the Organization, Return, Supplier, and Return Status.
Reprint—Select to print a list of goods returned that have been printed previously.

Report Type
Basic

Inventory standard

Description
Displays a list of inventory items.

Menu Path
Materials > Reports > Inventory Standard
Parameters
Enter the Organization, Part, Class, Manufacturer, Preferred Supplier, Tracking Method, Store, ABC Class, Reorder Qty., UOM, Stock Method, Minimum Quantity, Maximum Quantity, Bin, and Reorder Level.

Report Type
Consumer

Kit templates list

Description
Includes details on kit parts templates. Displays a list of parts where Track as Kit is selected.

Menu Path
Materials > Reports > Kit Template

Parameters
Enter Organization, Kit Part, Part, and Store.

Report Type
Consumer

List of expired kits

Description
Displays a list of expired kits determined by the specified lot expiration date.

Menu Path
Materials > Reports > List of Expired Kits

Parameters
Enter the Organization, Kit Part, Store, Lot, Class, and Category.
Expires By—Select the expiration date for the lot.

Report Type
Consumer
List of kits

Description
Displays a list of kits parts determined by the Track as Kit checkbox on the part record.

Menu Path
Materials > Reports > List of Kits

Parameters
Enter the Organization, Kit Part, Store, Lot, Class, and Category.
Include Kit Content List—Select to include the contents of the kit in the report.
Include Kit Costs—Select to include the costs associated to the kit in the report.

Report Type
Consumer

List of outstanding requisition items

Description
Includes outstanding line items for requisitions where Status is not Cancelled.

Menu Path
Materials > Reports > List of Outstanding Requisition Items

Parameters
Enter the Organization, For Store, From Store, From Supplier, Part, Requisition, Status, Originator, Buyer,
Quotation Indicator, Cost Code, and Task.
Req Items on Order—Select to print requisition items that are on order.
Requisitioned Items Not Yet Ordered—Select to print requisition items that have not been ordered.
All Requisition Items—Select to print all requisition items, regardless of the order status.
Date From and Date To—Enter the starting and ending date for which to retrieve data. Date From and Date To are required fields.

Report Type
Basic
List of stock

Description
Displays stock quantity, reorder level, reserved quantity, and quantity on order grouped by store and sorted by store, part, and part organization.

Menu Path
Materials > Reports > List of Stock

Parameters
Enter the Organization, Store, Part, Part Class, and Supplier.

Non-consignment—Select to print non-consignment items.

Consignment Item—Select to print consignment items.

Selection Options—Select one of the following options:

• All Stock—Select to print all stock records.
• Stock Below Reorder Level—Select to print stock that is below the reorder level.
• Stock At/Below Minimum Level—Select to print stock this is at or below the minimum level.
• Stock Requiring New Order—Select to print stock requiring a new order.

Report Type
Basic

Monthly usage trends

Description
Prints a report showing monthly usage trends.

Menu Path
Materials > Reports > Monthly Usage Trends

Parameters
Enter the Organization, Store, Part, and Part Description.

Month From and Month To—Enter the starting and ending month for which to retrieve data.

Report Type
Consumer
Parts currently reserved/allocated

Description
Displays a list of parts currently reserved/allocated.

Menu Path
Materials > Reports > Parts Currently Reserved/Allocated

Parameters
Enter the Organization, Store, Department, and Part.
Sort By—Select to sort by Part, WO/Activity, or Store.
Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Part stockouts

Description
Print a list of stockouts (R5STOCKOUTS) for parts.

Menu Path
Material > Reports > Part Stockouts

Parameters
Enter the Store, Part, and Class.
Enter the Start Date and End Date for the report.

Report Type
Consumer

Physical inventory discrepancy

Description
Displays physical inventory parts and quantities grouped by store, part, and part organization.
Menu Path
Materials > Reports > Physical Inventory Discrepancy

Parameters
Enter the Organization, Physical Inventory, Part, Store, and Status.
Include Null Quantities—Select to include items with null quantities on the report.
Include Non-Discrepancy Items—Select to include items without any discrepancies on the report.
Group By—Select to group by Store or Part.

Report Type
Basic

Print build kit list

Description
Includes details on kit parts and kits built.

Menu Path
Materials > Reports > Print Build Kit List

Parameters
Session ID—Enter the session ID for which to generate the report.
Include Front Page—Select to print a confidential banner in the title of the report.
Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type
Consumer

Print kit restock list

Description
Includes details on the parts held for restocking once a kit is broken up and parts are returned to stock.

Menu Path
Materials > Kits > Breakup Kit
Parameters
Enter Kit Part, Store, and Kit Lot.
Click Retrieve Parts.
Enter Store, Bin, Repair Bin and relevant parts information.
Click Print Kit Restock List.

Report Type
Consumer

Print physical inventory list

Description
Displays a list of parts with physical inventory.

Menu Path
Materials > Reports > Print Physical Inventory List

Parameters
Enter the Physical Inventory.
Select one or more of the following options:
• Print Quantity—Select to print the quantity.
• Order By Bin—Select to sort by bin.
• Print Assets—Select to print assets.
• Discrepancies Only—Select to print stocktake discrepancies only. Stocktake discrepancies occur when there are discrepancies between Expected Qty. and Physical Qty. of inventory items.

Report Type
Basic

Print pick ticket

Description
Displays a list of parts needed to perform work on work orders or equipment. The system only prints approved pick tickets.
Menu Path
Materials > Reports > Print Pick Ticket

Parameters
Enter the Organization, Work Order, Activity, From Pick Ticket, To Pick Ticket, and Store.
Sort By—Select to sort by Pick Ticket or Work Order.
Date From and Date To—Enter the starting and ending date by which to retrieve data. Date From and Date To are required fields.

Report Type
Basic

Print requisition

Description
Select the originator, requisition type, requisition number, status and/or buyer to print a specific requisition. Otherwise, the report includes all requisitions. Includes option to convert totals to Euro currency.

Menu Path
Materials > Reports > Print Requisition

Parameters
Enter the Organization, Originator, Requisition Type, Requisition, Status, and Buyer.
Quotation—Select to print the quotation number if a quotation is associated with the requisition.
Date—Enter the requisition date for which to retrieve data.

Report Type
Basic

Purchase history per item/supplier

Description
Displays all parts and work orders associated with a given supplier.
Menu Path
Materials > Reports > Purchase History Per Item/Supplier

Parameters
Enter the Organization, Supplier, Part, Work Order, and Task.
Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Return summary

Description
Displays comprehensive information, per purchase order, about approved returns to suppliers.

Menu Path
Materials > Reports > Return Summary

Parameters
Enter the Organization, Supplier, Store, Part, and Purchase Order.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Stock issues history by part

Description
Displays part, stock values grouped by store, part sorted by store, part, and part organization.

Menu Path
Materials > Reports > Stock Issues History by Part

Parameters
Enter the Organization, Store, From Part, To Part, Class, and Number of Months.
Report Type
Basic

Stock transactions

Description
Lists all approved inventory transactions for a specified period of time.

Menu Path
Materials > Reports > Stock Transactions

Parameters
Enter the Organization, Part, Part Class, Iss/Recv Entity, Iss/Recv Party, Counter Entity, Counter Party, Transaction Type, and Consignment Supplier.

Non-Consignment—Select to print non-consignment items.

Consignment Item—Select to print consignment items.

Start Date and End Date—Enter the starting and ending date for which to retrieve data. Start Date and End Date are required fields.

Report Type
Basic

Stock value listing by part type

Description
Provides an overview listing all parts in a store and all bin locations for that part. The report is grouped primarily by store and secondarily by part. The report has two display modes for listing either stock parts or for repair parts. Quantities and values are calculated for each location and totaled for each part.

Menu Path
Materials > Reports > Stock Value Listing by Part Type

Parameters
Enter the Organization, Part, Store, Part Class, Stock Class, Supplier, Commodity, Manufacturer Part Number, Manufacturer, Category, Currency, and Part Type.
Non-Consignment—Select to print non-consignment items.
Consignment Item—Select to print consignment items.
Cumulative Total—Select to display the total value for each part.
Display Repair Qty.—Select to display the repair quantity and core value for each part.
Group By—Select to group by Parts, Store, Stock, Supplier, Category, or Commodity.

Report Type
Basic

Project reports
Generate reports related to project functions.

Cost summary by project and area

Description
Prints a summary of costs by project and area.

Menu Path
Work > Reports > Projects > Cost Summary By Project and Area

Parameters
Enter the Organization and Project.

Report Type
Consumer

List of WOs for project

Description
Displays a list of work orders created for a project.
Menu Path
Work > Reports > Projects > List of WOs for Project

Parameters
Enter the Organization and Project.

Note: If you are using multi-organization security (MOS), and you select a master Project in your selection criteria, the system only retrieves those work orders created in the specific organizations to which you have access.

Include Completed—Select to include completed work orders on the report.

Report Type
Consumer

Project budget code cost summary

Description
Displays a summary of project costs by budget code.

Menu Path
Work > Reports > Projects > Project Budget Code Cost Summary

Parameters
Enter the Organization and Project.

Report Type
Consumer

Project cost breakdown

Description
Displays an overview of cost per project per budget.

Menu Path
ReportsWork > Reports > Projects > Project Cost Breakdown
Parameters
Enter the Organization, Project, and Budget Code.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Project cost summary

Description
Displays a summary of estimated, planned, ordered, actual, and total cost per project.

Menu Path
Work > Reports > Projects > Project Cost Summary

Parameters
Enter the Organization and Project.

Report Type
Consumer

Project POs

Description
Displays a summarized list of purchase orders created to procure materials and external services.

Menu Path
Work > Reports > Projects > Project POs

Parameters
Enter the Organization and Project.

Note: If you are using multi-organization security (MOS), and you select a master Project in your selection criteria, the system only retrieves those purchase orders created for work orders in the specific organizations to which you have access.

Include Completed—Select to include completed purchase orders on the report.
Report Type
Consumer

Project summary chart

Description
Displays a chart of costs associated with projects.

Menu Path
Work > Projects > Project Summary Chart

Note: You must select a project for which to generate the report, and then click the Project Summary Chart tab.

Parameters
Enter the Organization and Project.

Include Front Page—Select to include a front page with the report.

Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type
Consumer

Purchasing reports
Generate reports related to purchasing functions.

Approved POs awaiting delivery

Description
Displays a list of purchase orders that have been issued to suppliers but for which goods have not yet been received. The report includes the supplier, the date the purchase order was created, the related requisition, and purchase order numbers.

Menu Path
Purchasing > Reports > Approved POs Awaiting Delivery
Parameters
Enter the Organization, Supplier, Cost Code, Purchase Order, Part, Store, and Task.

Start Date—Enter the starting date for which to retrieve data.

Report Type
Basic

Blanket order list

Description
Prints a list of approved blanket orders and blanket order lines that includes the blanket order header and blanket order lines.

Menu Path
Purchasing > Reports > Blanket Order List

Parameters
Enter the Organization, Supplier, Blanket Order, For Store, and Class.

Comments—Select to print comments on the report.

Release Information—Select to include release information on the report.

Terms/Clauses—Select to include terms and clauses information on the report.

Custom Fields—Select to print custom fields on the report.

Approvers—Select to print information about the authorized approvers on the report.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

List of invoices

Description
Displays supplier invoice information.

Menu Path
Purchasing > Reports > List of Invoices
Parameters
Enter the Organization and Supplier.
Select to sort by Date Approved, Matched, or Date Recorded.
Start Date—Enter the starting date for which to retrieve data.

Report Type
Consumer

Pricing variance

Description
Displays a list of purchase orders where discrepancies exist between the purchase order and the invoice.

Menu Path
Purchasing > Reports > Pricing Variance

Parameters
Enter the Organization, Supplier, Purchase Order, Buyer, Class, and Variance Type.
Group By—Select to group the report data by Purchase Order, Class, Supplier, or Buyer.
Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Print PO

Description
Includes a purchase order header and both part and service line items. By default, the report selects the current revision of purchase orders with a status of "Ready for printing" or "Approved" and those that do not have "Printed" selected. Print purchase orders that do not have a status of "Ready for printing" or "Approved," or those that already have "Printed" selected by specifying a purchase order number on the parameter form.

Menu Path
Purchasing > Reports > Print PO
Parameters
Enter the **Organization, Store, Purchase Order, and Buyer**.

**Print Attachments**—Select to print document attachments associated with purchase orders in addition to the purchase order.

**Include All Revisions**—Select to include all revisions to the purchase order.

**Show Internal Part#**—Select to include the internal part number.

**Include Cost Code**—Select to include the cost code.

**Reprint**—Select to print purchase orders that have been printed previously.

**Note**: The system prints only the requisition total in Euro currency.

**Date**—Enter the order date for which to retrieve data.

**Print Images**—Select to print all images associated with the purchase order.

Report Type
Basic

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**Purchase history per PO/supplier**

**Description**
Displays all purchase orders for a given supplier.

**Menu Path**
**Purchasing > Reports > Purchase History Per PO/Supplier**

**Parameters**
Enter the **Organization, Supplier, and Status**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Basic

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**PO cost summary**

**Description**
Displays cost information for purchase orders.
Menu Path
Purchasing > Reports > PO Cost Summary

Parameters
Enter the Organization, Class, Status, Supplier, Cost Code, Buyer, Project, Store, Currency, and PO Status.

Include Details—Select to display the purchase order details.

Group By—Select to group the report data by Store, Supplier, Cost Code, Buyer, or Project.

Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

PO status

Description
Displays a list of purchase order information including cost and receipt information with optional totals.

Menu Path
Purchasing > Reports > PO Status

Parameters
Enter the Organization, Purchase Order, Status, Class, Supplier, Part, Trade, and Catalog Reference.

Include Totals—Select to include the purchase order totals on the report.

Order Date—Enter the order date for which to display purchase orders.

Due Date—Enter the due date for which to displays purchase orders.

Report Type
Consumer
POs awaiting invoicing

Description
Displays a list of purchase orders for goods that have been received but not yet invoiced. The report includes the related requisition and purchase order numbers, the part or service ordered, the outstanding quantity, the unit of measure for the items, and the order price per unit for goods or services.

Menu Path
Purchasing > Reports > POs Awaiting Invoicing

Parameters
Enter the Organization, Supplier, Purchase Order, and Store.
Include Matched—Select to include invoices that have a status of Matched.

Report Type
Basic

Quotation summary

Description
Displays a summary of the quotations from all suppliers associated with an RFQ; allows you to easily compare all supplier responses received from quotations.

Menu Path
Purchasing > Reports > Quotes > Quotation Summary

Parameters
Enter the RFQ, Quotation Status, Part, Supplier, Quotation, Trade, Task, and Organization.
Show RFQs—Select to sort Per Part/Service or Per Supplier.

Report Type
Consumer
Request for quotation

Description
Printed form that is sent to suppliers to elicit part and service quotes. Data includes the quotation header, requested by, parts, services, and comments sections.

Menu Path
Purchasing > Reports > Quotes > Request for Quotation

Parameters
Enter the RFQ, Quotation, Quotation Status, Part, Supplier, Trade, Task, and Organization.
Include Quotation Comments—Select to include quotation comments in this report.
Include Part/Services Comments—Select to include part/services comments in this report.
Include Cancelled Quotations—Select to include cancelled quotations in this report.
Include Response Values—Select to include response values in this report.

Report Type
Basic

Request for quotation summary

Description
Displays all suppliers, parts, and services that are associated with an RFQ; displays additional awarded information for parts and services that have been awarded to a supplier.

Menu Path
Purchasing > Reports > Quotes > Request for Quotation Summary

Parameters
Enter the RFQ, Status, Part, Supplier, Organization, Task, and Trade.
Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type
Consumer
Vendor lead time report

Description
Print the vendor lead time report. The lead time report displays lead time information from all purchase orders related to the selected supplier.

Menu Path
Purchasing > Reports > Vendor Lead Time

Parameters
Enter the Supplier, Organization, Purchase Order, Status, and Part.
Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type
Consumer

Work reports
Generate reports related to work functions.

Actual labor hours against estimated

Description
Displays a list displaying how much time was spent, per trade, on work during a specified time period versus the original estimate.

Menu Path
Work > Reports > Actual Labor Hours Against Estimated

Parameters
Enter the Organization, Trade, and Department.
Group By—Select one of the following options:
• None—Select to not group by day or week.
• Day—Select to group by day.
• Week—Select to group by week.
**Start Date** and **EndDate**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Basic

**Batch work order generation summary**

**Description**
Displays summary information of the work order generated from the Generate/Release WOs form. This report can only be printed from the Generate/Release WOs form.

**Menu Path**
Work > Process > Generate/Release WOs

**Parameters**
No parameters

**Report Type**
Basic

**Booked labor by activity**

**Description**
Display a graph that calculates the number of booked hours by activity per trade.

**Menu Path**
Work > Reports > Booked Labor By Activity

**Parameters**
Enter **Organization** and **Work Order**.

**Report Type**
Consumer
Call Center WO

Description
Displays a work order with fields commonly used by off-site call center contractors who do not have access to the system

Menu Path
Work > Reports > Call Center WO

Parameters
Enter the Organization, Work Order, Status, Provider, Department, Service Problem Code, WO Type, Priority, Equipment, Location, Trade, and Date Range Type.

Include Child Work Orders—Select to include child work orders on the report.

Include Custom Fields—Select to print custom fields on the report.

Print Attachments—Select to print attachments associated with the work order. Attached files may originate from the following sources: the associated work order, equipment, projects, departments, parent work orders, and locations.

Include MEC Work Orders—Select to include MEC work orders on the report.

Print MEC Attachments—Select to print MEC attachments.

Barcode—Select to print the barcode for the work order.

Include Customer Requests—Select to print customer requests associated with the work order.

Print Images—Select to print all images associated with the work order.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Cost summary by transaction date

Description
Prints a summary of costs by transaction date. The report includes summary counts, hours and costs for all pieces of equipment which appear on PPM and JOB type work orders.

Menu Path
Work > Reports > Projects > Cost Summary By Transaction Date
Parameters
Enter Organization, Location, Department, Cost Code, Equipment, Equipment Type, Class, Reporting Currency, Status, Include WOs and Trade.

Include Front Page—Select to include a front page on the report.

Mark Confidential—Select to print a confidential banner in the title of the report.

Show Details—Select to display the work order details in addition to the work order cost information.

Group By—Select to group the report by Location, Department, Cost Code, Equipment, or Trade.

Start Date and End Date—Enter the starting and ending date the costs were incurred for which to generate the report.

Report Type
Consumer

Customer invoice details

Description
Includes details on customer invoices such as charge categories, subcategories, charge levels, and adjustments.

Menu Path
Work > Reports > Customer Invoice Details

Parameters
Enter Organization, Invoice, Customer, Contract, Status, and Contract Type.
Enter Created Start Date and Created End Date for which to generate the report.
Select to generate the invoice details report on the Charge Category Adjustments, Subcategory Adjustment or Both.

Report Type
Consumer

Customer request chart

Description
Displays a graph that calculates the number of customer requests by various groupings.
Menu Path
Work > Reports > Customer Request Chart

Parameters
Enter Type, Assigned To, Department, Employee, Provider, Service Category, Service Problem Code, and Status.
Request Date and Promise Date—Enter the requested date and the promised date for the customer's request.

Report Type
Consumer

Daily hours worked per employee

Description
Displays what type of work (normal, overtime, and holiday) a specific employee performed over a given period and the number of hours.

Menu Path
Work > Reports > Daily Hours Worked Per Employee

Parameters
Enter the Organization, Employee, and Hour Type.
If you leave Employee and Hour Type blank, the system retrieves all employee data working all types of hours.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

Daily trade schedule

Description
Displays a daily trade schedule for a specific date or range of dates.
Menu Path
Work > Reports > Scheduling > Daily Trade Schedule

Parameters
Enter the Organization, Trade, and Department.

Date From and Date To—Enter the starting and ending date for which to retrieve data. Date From and Date To are required fields.

Report Type
Consumer

Delinquent PM summary

Description
Displays a list of employees that are assigned to past due PM work orders. Also displays the total count of past due PM work orders and total past due work hours.

Menu Path
Work > Reports > Delinquent PM Summary

Parameters
Enter the Organization, Department, and Trade.
Select Include Details to include work order details in the report.

Equipment profile

Description
Print details for a piece of equipment, or a list of work orders, or PM schedules associated to the equipment.

Menu Path
Work > Reports > Equipment Profile

Parameters
Enter the Equipment, Organization, Type, Class, Category, and Cost Code.
Enter the Work History Start Date and Work History End Date.
Select **Include Parts Associated** to include associated parts in the report.

Select **Include PM Schedules** to include PM schedules in the report.

Select **Include Work History** to include the work history in the report.

**Expired warranties**

**Description**
Displays a list of all warranties that have expired.

**Menu Path**
Work | Reports | Expired Warranties

**Parameters**
Enter the **Organization**, **Type**, **Equipment**, and **Location**.

**Near Threshold**—Select to include warranties that are near their threshold.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Consumer

**Future maintenance cost**

**Description**
Displays estimated present and future maintenance costs for equipment for a selected period. Report is divided into four sections.

1. **Current Work Orders**—displays remaining estimated costs of open work orders
2. **Deferred Activities**—displays estimated costs of deferred maintenance
3. **Current PM**—displays remaining estimated costs of open PM work orders
4. **Forecasted PM**—displays estimated costs of PMs that will fall due within the specified date range

**Menu Path**
Work > Reports > Future Maintenance Cost

**Parameters**
Enter the **Organization**, **Equipment**, **Equipment Type**, **Equipment Class**, and **Department**.

**Include Work Orders**—Select to include work orders in this report.
Include Deferred Activities—Select to include deferred activities in this report.

Include PMs—Select to include PMs in this report.

Include PM Forecasting—Select to include PM forecasting in this report.

Start Date and End Date—Enter the starting and ending dates for which to retrieve data.

Report Type

Basic

Hours needed for tasks

Description
Displays a listing of work order tasks along with their estimated hours.

Menu Path
Work > Reports > Hours Needed for Tasks

Parameters
Enter the Organization, Department, and Task.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type

Consumer

Labor required per day or trade

Description
Displays a list of labor required for a particular day.

Menu Path
Work > Reports > Scheduling > Labor Required Per Day or Trade

Parameters
Enter the Organization, Trade, and Department.

Select one of the following options:
• Per Day—Select to sort by day.
Reports

- **Per Trade**—Select to sort by trade.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data. **Start Date** and **End Date** are required fields.

**Report Type**
Basic

**List of all PM schedules**

**Description**
Displays a listing of preventive maintenance schedules.

**Menu Path**
Work > Reports > Scheduling > List of All PM Schedules

**Parameters**
Enter the **Organization**.

**Sort By**—Select one of the following options:
- **PM**—Select to sort by PM.
- **Nesting Reference**—Select to sort by nesting reference.

**Report Type**
Consumer

**List of permit issues**

**Description**
Displays which permits were issued for what work orders.

**Menu Path**
Work > Reports > Permits > List of Permit Issues

**Parameters**
Enter the **Organization**, **Permit**, **Work Order**, **Equipment**, and **Type**.

**Include Inactive Permits**—Select to include inactive permits in the report.

**Sort By**—Select to sort by **Equipment** or **Work Order**.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

List of WOs bypassed due to nesting

Description
Displays a list of PM work orders that were bypassed because they were superseded by another PM work order.

Menu Path
Work > Reports > List of WOs Bypassed Due to Nesting

Parameters
Enter the Organization and Department.

Report Type
Consumer

List of work orders

Description
Displays a list of work orders where Status=Released.

Menu Path
Work > Reports > List of Work Orders

Parameters
Enter the Organization, Department, Equipment, Assigned To, and Priority.
Select to group the work order report by Department, Equipment, Assigned To, or Priority.
Scheduled Start Date and Scheduled End Date—Enter the scheduled start date and end date to retrieve the data.

Report Type
Consumer
Long term WO list

Description
Displays a list of work orders due over a longer period of time (six months, for example) in addition to projecting PM work orders that will be coming due.

Menu Path
Work > Reports > Long Term WO List

Parameters
Enter the Organization, Equipment, WO Type, Priority, Trade, Department, Location, PM, Work Order, Project, Type, Assigned To, and Assigned By.

Search MEC WOs—Select to search multiple equipment work orders.

Start Date and End Date—Enter the starting and ending date for which to retrieve data. Start Date and End Date are required fields.

Report Type
Basic

Material requirements analysis

Description
Displays a list of stock materials needed to complete a specific work order.

Menu Path
Work > Reports > Scheduling > Material Requirements Analysis

Parameters
Enter the Organization, Department, PM, Equipment, WO Type, Priority, Trade, Location, Project, Type, and Work Order.

Direct Purchase Due Date is After Start Date—Select to include stock items where the direct purchase date is after the work order start date.

Qty Required > Qty in Stock—Select to include stock items where the quantity required for the work order is greater than the quantity in stock.

Search MEC WOs—Select to include MEC work orders on the report.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.
Report Type
Consumer

Meter based PM due report

Description
Displays a list of meter-based PMs due by a certain date.

Menu Path
Work > Reports > Scheduling > Meter Based PM Due Report

Parameters
Enter the Organization, Equipment, PM, Meter UOM, WO Class, and Department.
Sort By—Select to sort by Equipment, PM, or Estimated Due Date.
Due By—Enter the due date for which to print the report. Due By is a required field.

Report Type
Consumer

Monthly scheduling details

Description
Displays a row calendar showing monthly scheduling details such as scheduled employee labor, planned parts, scheduled tools, and daily employee exceptions.

Menu Path
Work > Reports > Monthly Scheduling Details

Parameters
Enter the Organization and Department.
Start Date and End Date—Enter the starting and ending dates for which to retrieve data.
Scheduled Labor—Select to display labor previously scheduled to work orders for the organization and department.
Employee Exceptions—Select to display employee labor exceptions for the department. Exceptions include days the employees cannot work due to employee time off and company holidays.
Planned Parts—Select to display parts planned for work orders for the organization and department.

Scheduled Tools—Select to display tools scheduled for work orders for the organization and department.

Report Type
Consumer

Part failures

Description
Displays the percentage of parts that failed versus parts that were issued. Data for this report comes from failures listed on the Part Failures page and the Parts page of the Work Orders form.

Menu Path
Work > Reports > Part Failures

Parameters

Date From and Date To—Enter the starting and ending dates for which to retrieve data.

Report Type
Consumer

Permits for WOs

Description
Displays copies of work permits for a particular work order.

Menu Path
Work > Reports > Permits > Permits for WOs

Parameters
Enter the Organization, Permit Reference, Permit, and Work Order.

Report Type
Consumer
PM compliance

Description
Includes compliance details for PM work orders.

Menu Path
Work > Reports > PM Compliance

Parameters
Enter Organization, PM, Department, Equipment, Assigned To, and Assigned By.
Start Date and End Date—Enter the starting and ending date for which to generate the report.

Report Type
Consumer

PM forecasting

Description
Displays a printed representation of a PM forecasting session similar to what is displayed on the actual PM Forecasting form.

Menu Path
Work > WO Planning > PM Forecasting

Parameters
None

Report Type
Basic

PM schedule profile

Description
Displays a list of PM schedule details and activity information along with optional task instructions and route information.
Menu Path
Work > Reports > Scheduling > PM Schedule Profile

Parameters
Enter the PM Schedule, Organization, Type, Class, Trade, and Equipment.
Select Include Task Instructions to print with the report.
Select Include Route Equipment to print with the report.
Enter the Start Date and End Date for the report.

Report Type
Consumer

Print customer contract

Description
Prints a contract for a specific customer.

Menu Path
Work > Reports > Asset Management Services > Print Customer Contract

Parameters
Enter the Organization, Customer Contract, and Customer.
Pricing Schedules—Select to display pricing schedules on the report.
Arranged WO Types—Select to display arranged work order types.
Custom Tariffs/Part Charges—Select to display custom tariffs and part charges if Custom Trade Rates and Custom Part Charges are selected on the related Pricing Schedule Record View page.
Related Customer Contracts—Select to display unfinished/approved related customer contracts on the report.
Fixed Payments—Select to display fixed payments on the report
Calculated Work Orders—Select to display calculated work orders on the report.

Report Type
Consumer
Print permit to work

Description
Report displays a list of all permits to work with Status of Approved or Active. Includes all comments for safety records and lockout/tagout records, user defined fields, lockout/tagout tags, and hazard rating system information.

Menu Path
Work > Reports > Print Permit to Work

Parameters
Enter the Organization, Permit to Work, Equipment, PTW Type, Department, and Risk.
Required Start Date and Required End Date—Enter the required starting and ending date for which to retrieve data.
Include Comments—Select to include the permit to work comments.
Include Safety Comments—Select to print safety comments for the permit to work.
Include LOTO Comments—Select to print lockout/tagout comments for the permit to work.
Include User Defined Fields—Select to print user defined fields added to the permit to work.
Include LOTO Tags—Select to print tags for lockout/tagout procedures implemented for the permit to work.
Include Hazard Rating System—Select to print health hazards, flammability, instability, and special hazard records for the permit to work.

Report Type
Basic

Print short WO cards

Description
Displays an abbreviated version of the Print Work Order report, including work order cost.

Menu Path
Work > Reports > Print Short WO Cards

Parameters
Enter the Organization, Work Order, Department, PM Schedule, Type, Equipment, Location, Priority, WO Type, Trade, Project, Equipment Criticality, Status, Customer, Property, Building,
Floor/Unit, Assigned To, Assigned By, Person Responsible, From Point, To Point, Standard WO, and Manufacturer.

Scheduled Date Range—Select to print the work order card for the scheduled date range.

Reprint—Select to reprint the work order card.

Include Child Work Orders—Select to include child work orders on the work order card.

Work Order Custom Fields—Select to print custom fields added for work orders on the work order card.

Equipment Custom Fields—Select to print custom fields added for equipment on the work order card.

Work Order User Defined Fields—Select to print user defined fields added for work orders on the work order card.

Equipment User Defined Fields—Select to print user defined fields for equipment on the work order card.

By Responsible Person—Select to print the work order activity details by the person responsible on the work order card.

Hide Cost Values—Select to hide cost values on the work order card.

Prevent Update Print Flag—Select to prevent users from marking the records returned printed.

Print Attachments—Select to print document attachments associated with work orders in addition to the work order card.

Print Images—Select to print images associated with work orders in addition to the work order card.

Note: You can only print document attachments that are Adobe Acrobat Portable Document Format (.PDF) files.

Print MEC Attachments—Select to print MEC document attachments associated with work orders in addition to the work order card.

Search MEC Work Orders—Select to search multiple equipment work orders.

Show Defer Maintenance Activities—Select to display all work order activities where Defer Maintenance is selected.

Include Actual Parts—Select to print parts added for work orders on the work order card.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type

Basic
Print work order

Description
Includes work order details, task listing, diagnostics, repair details, and related equipment information.

Menu Path
Work > Reports > Print Work Order

Parameters
Enter the Organization, Work Order, Department, PM Schedule, Type, Equipment, Location, Priority, WO Type, Trade, Project, Equipment Criticality, Status, Customer, Property, Building, Floor/Unit, Assigned To, Assigned By, Person Responsible, From Point, and To Point.

Scheduled Date Range—Select to print work orders based on the Target Date.

Reprint—Select to print work orders that have been printed previously.

Include Child Work Orders—Select to print child work orders on the work order card.

Work Order Custom Fields—Select to print custom fields added for work orders on the work order card.

Equipment Custom Fields—Select to print custom fields added for equipment on the work order card.

Print Attachments—Select to print document attachments associated with work orders in addition to the work order card.

Note: You can only print document attachments that are Adobe Acrobat Portable Document Format (.PDF) files.

By Responsible Person—Select to group report data by the person responsible.

Barcode—Select to print the barcode on the work order card.

Include Linear Reference Details—Select to print linear reference details on the work order card.

Include MEC Work Orders—Select to print MEC work orders on the work order card.

Print MEC Attachments—Select to print MEC document attachments associated with work orders in addition to the work order card.

Print Attachments—Select to print files attached to the work order with the report. Attached files may originate from the following sources: the associated work order, equipment, projects, departments, parent work orders, and locations.

Print Images—Select to print all images associated with the work order.

Include Customer Requests—Select to print customer requests on the work order card.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic
Proof of delivery

Description
Displays proof that a work order was delivered or performed.

Menu Path
Work > Reports > Proof of Delivery

Parameters

Work Order—Enter the work order for which to run the report.
Include Front Page—Select to print a confidential banner in the title of the report.
Mark Confidential—Select to print a confidential banner in the title of the report.

Report Type
Consumer

Qualification expiration report

Description
Displays a list of qualification expirations and expiration dates for an employee based on the date range entered. Select to generate the report for a single employee or a group of employees.

Menu Path
Work > Reports > Qualifications > Qualification Expiration Report

Parameters
Enter the Organization, Employee Code, Employee Class, Employee Type, Trade, Department, Qualification, and Qualification Class.
Sort By—Select to sort by Employee, Trade, Organization, Department, or Qualification.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic
Qualification requirement report

**Description**
Displays a list of qualifications that are required for an employee to perform a trade or task for which they are not currently qualified. Select to generate the report for a single trade or task, or for a group of trades or tasks.

**Menu Path**
Work > Reports > Qualifications > Qualification Requirement Report

**Parameters**
Enter the Organization, Employee, Employee Class, Employee Type, Trade, Trade Class, Task, Department, and Qualification.

**Report Type**
Basic

Resource load graph

**Description**
Displays a graph report listing resource data for the selected PM work orders.

**Menu Path**
Work > WO Planning > PM Forecasting > Forecasting tab

**Parameters**
None

**Report Type**
Basic

Safety review required report

**Description**
Displays a list of all safety, permits to work, and lockout/tagout records where Safety Review Required is selected for PM schedules, equipment, parts, and standard work orders. The report retrieves the records that have not been previously reviewed.
Menu Path
Select **Work > Reports > Safety Review Required**.

Parameters
Enter **Organization**.

**Start Date** and **End Date**—Enter the starting date and ending date for which to retrieve data.

**Include Safety Records**—Select to print safety records.

**Include Permit Records**—Select to print permit records.

**Include LOTO Records**—Select to print lockout/tagout records.

**Include Out of Service**—Select to print all PM, equipment, standard work order, and part records marked **Out of Service**, but which meet the specified report criteria.

Report Type
Consumer

Schedule attainment

Description
Displays a summary of scheduled activities. View the number of activities that were scheduled and worked on the same date, the number of activities that were scheduled but not started on the same date, the number of activities that were worked on and not scheduled on the same date, as well as the percentage of activities scheduled that were worked on the same date.

Menu Path
**Work > Reports > Scheduling > Schedule Attainment**

Parameters
Enter the **Organization**, **Trade**, **Department**, and **Person Responsible**.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer
Scheduled activities

Description
Displays information for scheduled activities.

Menu Path
Work > Reports > Scheduling > Scheduled Activities

Parameters
Enter the Organization, Work Order, Trade, Department, Maintenance Equipment, and Person Responsible.
Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

Scheduled vs. actual - detail

Description
Displays detailed schedule activities. Depending on how you set up the report criteria, you can review the schedule date for scheduled work (but not started) on the same day, activities scheduled and worked on the same day, or work done but not scheduled on the same day. (You might have multiple lines for some activities.)

Menu Path
Work > Reports > Scheduling > Scheduled – Actual Detail

Parameters
Enter the Organization, Trade, Department, and Person Responsible.
Show Details of Activities Where—Select one of the following sort options: Scheduled but Not Worked on the Same Date, Worked and Scheduled on the Same Date, or Worked but Not Scheduled.
Date From and Date To—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer
Shift employee

**Description**
Displays a list of employees on a shift grouped by department.

**Menu Path**
Work > Reports > Scheduling
Shift Employee

**Parameters**
Enter the **Organization**, **Department**, **Trade**, and **Shift**.

**Report Type**
Consumer

Short customer invoice

**Description**
Includes short details on customer invoices.

**Note:** The report does not include details such as charge categories, subcategories, charge levels, and adjustments.

**Menu Path**
Work > Reports > Short Customer Invoice

**Parameters**
Enter **Organization**, **Invoice**, **Customer**, **Contract**, **Status**, and **Contract Type**.
Enter **Created Start Date** and **Created End Date** for which to generate the report.

**Report Type**
Consumer
Short term WO list (activities)

**Description**
Displays a list of work orders due within the near future, including their activities, starting and ending dates, and estimated labor hours.

**Menu Path**
Work > Reports > Short Term WO List (Activities)

**Parameters**
Enter the Organization, Equipment, WO Type, Priority, Trade, Department, Location, PM, Work Order, Project, Type, Equipment Criticality, and Status.

Include Multiple Equipment—Select to include multiple equipment on the report.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

**Report Type**
Consumer

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Short term WO list (WOs)

**Description**
Displays a list of work orders due within a short period of time (a week, for example); does not project PM work orders.

**Menu Path**
Work > Reports > Short Term WO List (WOs)

**Parameters**
Enter the Organization, Equipment, WO Type, Priority, Trade, Department, Location, PM, Work Order, Project, Type, Equipment Criticality, Status, Assigned To, and Scheduling Group.

Search MEC WOs—Select to search multiple equipment work orders.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

**Report Type**
Basic
Reports

Tool usage

**Description**
Displays a list of work orders per tool.

**Menu Path**
Work > Reports > Tool Usage

**Parameters**
Enter the **Organization, Work Order, Department,** and **Tools**.

**Date From** and **Date To**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Consumer

WO backlog report

**Description**
Displays a list of backlogged work orders.

**Menu Path**
Work > Reports > WO Backlog Report

**Parameters**
Enter the **Organization, Department, Trade, Type, Equipment, PM, Location, WO Type, Priority, Equipment Criticality, Status, Assigned To,** and **Scheduling Group**.

**Warranty**—Select to display the equipment warranty associated with the work order.

**Show MEC Work Orders**—Select to display multiple equipment work orders.

**Sort By**—Select to sort by **Start Date, Equipment,** or **Location**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Basic
WO aging

Description
Provides counts of work orders, per work order type, that are 1-10, 11-30, 31-60, 61-90, or over 90 days overdue.

Menu Path
Work > Reports > WO Aging

Parameters
Enter the Organization and WO Type.

Report Type
Consumer

WO cost list

Description
Displays the costs of a work order.

Menu Path
Work > Reports > WO Cost List

Parameters
Enter the Organization and Work Order.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Basic

WO cost summary graph

Description
Displays a graph showing itemized and totaled cost information, e.g., labor, materials, services, and tool costs, by equipment (and related child equipment) for open and closed work orders.
Menu Path
Work > Reports > WO Cost Summary Graph

Parameters
Enter the Organization, Equipment Class, Category, Location, Type, Equipment, Department, WO Class, Cost Code, Trade, Reporting Currency, WO Status, Include WOs, and Graph Type.

Current Exchange Rate—Select to print the current exchange rate.
Include Service—Select to print service details.
Include Labor—Select to print labor details.
Include Material—Select to print materials details.
Include Tools—Select to print tools details.
Group By—Select to group by Location, Department, Cost Code, Equipment, or Trade.
Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type
Consumer

WO on-time delivery by employee

Description
Displays a summary or detailed report of on-time work order (released and completed) statistics by employee.

Menu Path
Work > Reports > WO On-Time Delivery by Employee

Parameters
Enter the Organization, Employee Code, Task, Class, Requested By, Problem Code, Priority, Department, Work Order, and WO Type.

Report Type—Select to print a Summary, Detail, or Complete version of the report.
Date From and Date To—Enter the starting and ending date for which to retrieve data. Date From and Date To are required fields.

Report Type
Consumer
WO on-time delivery by trade

Description
Displays a summary or detailed report of on-time work order (released and completed) statistics by trade.

Menu Path
Work > Reports > WO On-Time Delivery by Trade

Parameters
Enter the Organization, Trade, Task, Assigned To, Class, Requested By, Problem Code, Priority, Department, Work Order, and WO Type.

Report Type—Select to print a Summary, Detail, or Complete version of the report.

Date From and Date To—Enter the starting and ending date for which to retrieve data. Date From and Date To are required fields.

Report Type
Consumer

WO statistics

Description
Displays statistical backlog information including the number of work orders: backlogged according to Date From; scheduled to begin within the date range; backlogged at Start Date but completed within the date range; and scheduled to begin within the date range and completed within the date range.

Menu Path
Work > Reports > WO Statistics

Parameters
Enter the Organization and WO Type.

Show Totals—Select to display the work order totals on the report.

Date From and Date To—Enter the starting and ending date for which to retrieve data. Date From and Date To are required fields.

Report Type
Consumer
Work by employee

**Description**
Displays a list of all work orders where booked labor for an employee has been applied.

**Menu Path**
Work > Reports > Scheduling > Work by Employee

**Parameters**
Enter the **Employee**, **Work Order**, **Equipment**, **Organization**, and **Status**.

**Start Date** and **End Date**—Enter the starting and ending date for which to retrieve data.

**Report Type**
Consumer
Geographical Information Systems are important to companies with equipment spread over a large area such as local governments/schools, oil and gas companies, utilities, etc. GIS systems are widely used to show equipment spatially via maps. These maps provide a better understanding of the location of the equipment, directions to the equipment, work history of the equipment, and the surrounding area of the equipment in question.

Integrate Infor EAM (Infor EAM) with Environmental Systems Research Institute's (ESRI) GIS package so that you have the advantages of a GIS system paired with those of Infor EAM.

This chapter documents procedures completed in both the Infor EAM and ESRI GIS systems. As a result, section headings include (Infor EAM) or (ESRI), if applicable, to identify in which system the task should be performed.

Linking Infor EAM equipment and GIS features

When integrating Infor EAM with ESRI’s GIS (Geographical Information System) package, both programs should reflect an accurate representation of your company assets. You may have an Infor EAM equipment record that has not been defined in the GIS system or a GIS feature that has not been defined in the Infor EAM system. If you want to view a piece of equipment on a GIS map, create a corresponding GIS feature for the Infor EAM equipment record. Likewise, if you want access to Infor EAM functionality, e.g., creating and scheduling work orders for a GIS feature, create a corresponding Infor EAM equipment record for the GIS feature.

The systems link corresponding equipment/features together with a GIS object identification number (GIS ID in Infor EAM, GISOBJID in ESRI).

Processing rules for defining equipment records within ESRI

See the following list of processing rules the system follows when automatically creating Infor EAM equipment records for GIS features you have created within ESRI:

Note: Contact your system administrator for more information regarding these processing rules.
GIS integration

- A GIS feature must reside within a layer that contains the GISOBJID attribute before you can create a corresponding equipment record.

- The system creates equipment records based on the field mappings defined for the feature’s layer. If a field mapping has not been defined, the system populates the field based on the GIS profile defined on the user’s default preference record for the layer.

  **Note:** 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.

  Field mappings are not defined for **Layer**, **Location X**, and **Location Y**. The system creates equipment records based on an implied mapping where GIS is the owner and the data is automatically mapped to the **Layer**, **Location X**, and **Location Y** fields in Infor EAM. If a feature is a line or polygon feature, the system populates the Infor EAM **Location X** and **Location Y** based on the feature’s center point.

- If more than one GIS attribute is mapped to a single Infor EAM field, the system concatenates the data into the single field based on the **Sequence** and **Delimiter** values on the mapping record. Likewise, if a GIS attribute that contains concatenated data is mapped into more than one Infor EAM field, the system parses the data based on the **Sequence** and **Delimiter** values on the mapping record.

- The system automatically defines the equipment as an Asset record if a field mapping does not exist for the equipment type.

- The system assigns the equipment code of the equipment record based on any existing field mapping. If a feature attribute is mapped to the equipment code field, the system assigns the equipment code based on the field mapping even if the **AUTOANUM** installation parameter is set to Yes. If no field mapping exists for the equipment code, the system automatically generates an equipment code **even if AUTOANUM** is set to No.

- The Infor EAM **Class**, **Location**, **Position**, **Parent**, **PO**, and **Part** can be unique per Infor EAM organization. This organization may or may not be the same organization of the equipment record. If there is a mapping record for **Class**, **Location**, **Position**, **Parent**, **PO**, or **Part**, the system must also populate the organization of **Class**, **Location**, **Position**, **Parent**, **PO**, or **Part**. If you map data into these fields, you must also map the organization field for each of them.

  If a field mapping does not exist for the organization of **Class**, **Location**, **Position**, **Parent**, **PO**, or **Part**, the system populates the information based on the following:

  - **If the mapped value for **Class**, **Location**, **Position**, **Parent**, **PO**, or **Part** belongs to a single organization**—The system copies the organization.

  - **If the mapped value for **Class**, **Location**, **Position**, **Parent**, **PO**, or **Part** belongs to multiple organizations**—The system attempts to populate the organization based on the GIS profile defined on the user’s default preference record for the layer.

  - **If the mapped value for **Class**, **Location**, **Position**, **Parent**, **PO**, or **Part** belongs to multiple organizations and there is not a default GIS profile**—The system attempts to populate the organization based on the organization of the equipment record.
Defining Infor EAM equipment (ESRI)

For every GIS feature within ESRI that you want to integrate with Infor EAM, define a corresponding Infor EAM equipment record.

You can also define equipment records within ESRI through synchronization.

**Note:** Depending on your system configuration, the system automatically creates an equipment record in Infor EAM as soon as you save a new feature, and then displays the Create Infor EAM Equipment popup to notify you of the transaction. Contact your system administrator for more information.

To define Infor EAM equipment:

1. Open ArcMap to an existing map.
2. Select the GIS feature(s) for which to define equipment records, and then click ![Create Infor EAM Equipment](image). ESRI connects to Infor EAM, verifies that you are authorized to define equipment within the organization you specified on the profile, and creates the equipment record in Infor EAM. The system displays a popup containing success and error messages in **Result**. The system defines an Infor EAM equipment record for each GIS feature with a success message.
3. Click **Close**.

**Note:** To save this data, right-click, and then select **Save As**. The system displays a Windows Explorer window. Select the file in which to save the data, and then click **Save**. The system saves the data in the file, e.g., if you receive error messages because the system does not successfully define corresponding Infor EAM equipment records for the GIS features, save the data. Use the saved list of data to identify those GIS features for which you still need to create equipment records. Correct the error identified in the **Result** column, and then complete the process to define equipment records within ESRI again.

Processing rules for defining GIS features within Infor EAM

See the following list of processing rules that the system follows when creating corresponding GIS features for equipment records you have created within Infor EAM:

**Note:** Contact your system administrator for more information regarding these processing rules.

The system creates features based on the field mappings defined for the selected layer. If a field mapping has not been defined, the system populates the field based on the GIS profile defined on the user’s default preference record for the selected layer.

**Note:** If a field mapping exists, the system always populates the attribute based on the data of the equipment field, even if the field’s value is empty and the GIS profile value contains data.

If more than one Infor EAM field is mapped to a single GIS attribute, the system concatenates the data into the single attribute based on the **Sequence** and **Delimiter**. Likewise, if an Infor EAM field that contains concatenated data is mapped into more than one GIS attribute, the system parses the data based on the **Sequence** and **Delimiter** values on the mapping record.
Defining GIS features (Infor EAM)

To define GIS features:

1. Open the Assets, Positions, or Systems form.
2. Click **New Record**.
3. Enter the information necessary to define the piece of equipment.
4. **Profile**—Enter the profile that GIS should use to create the GIS feature.
5. Click **Save Record**. The system automatically generates a GIS ID number.

**Note:** Depending on your system configuration, the system may not automatically generate a GIS ID number.

- If the system displays the Create GIS Feature popup after you click **Save Record**, enter the **Layer**, **Location X**, and **Location Y** for the GIS feature, and then click **Submit**. The system saves the record and generates a GIS ID number.
- If the **Create GIS Feature** button is enabled, click **Create GIS Feature** after you click **Save Record**. The system displays the Create GIS Feature popup. Enter the **Layer**, **Location X**, and **Location Y** for the GIS feature, and then click **Submit**. The system saves the record and generates a GIS ID number.

6. Synchronize features with equipment records so that the corresponding feature is created within GIS.

Synchronizing records (ESRI)

Synchronize Infor EAM and ESRI's GIS to ensure both systems contain a complete and accurate list of corresponding features/equipment.

Synchronize attributes to ensure that corresponding features and equipment reflect the same attribute values.

**Note:** A direct connection with the GIS database is not supported for the synchronization of records and attributes in the GIS-EAM integration.

You can only synchronize records from a GIS map that contains layers integrated with Infor EAM, e.g., the layer contains a feature that has a **GISOBJID** attribute.

Synchronizing equipment with features (ESRI)

Search for GIS features with no corresponding defined Infor EAM equipment records, view a list of discrepancies, and create corresponding equipment records for the existing features.

To synchronize equipment records with features:

1. Open **ArcMap** to an existing map.
2 Click :Click:

3 Layer—Select the layer for which to view features without corresponding equipment records.

4 Consider only features selected on the map—Select to only compare features that are selected on the map.

5 Consider only features with a GISOBJID—Select to only compare features that reference a GISOBJID number.

Note: Unselect Consider only equipment with a GISOBJID to compare features without a GISOBJID number, which enables you to create equipment records for existing features that were not previously integrated.

6 Click View Discrepancies. The system displays features for which there are no corresponding equipment records.

7 Select—Select the features for which you want to create corresponding equipment records. The system automatically selects all of the features. Remove individual features from the list by unselecting the line.

Note: To select all lines at once, click Select All. To unselect all lines at once, click Unselect All.

8 Click Create Equipment. The system creates corresponding equipment records within Infor EAM. The system populates Result and Creation Date/Time and unselects all features for which corresponding equipment records were created.

Note: If the system cannot create a corresponding equipment record for a selected feature, it displays the reason in Result. The feature remains selected.

You must have insert privileges in Infor EAM to create an equipment record. Contact your system administrator for more information.

The system assigns the feature’s existing GISOBJID number to the equipment record. If the feature does not have a GISOBJID number, the system automatically generates one.

The system automatically populates the equipment record’s Layer, Location X, and Location Y. If the feature is not a point feature, the system automatically populates Location X and Location Y for its corresponding equipment record based on the center of the feature.

Synchronizing features with equipment (ESRI)

Search for Infor EAM equipment records with no corresponding defined GIS features, view a list of discrepancies, and create corresponding features for the existing equipment records.

Note ESRI’s ArcMap displays features as soon as the system creates them.

To synchronize features with equipment:

1 Open ArcMap to an existing map.

2 Click :Click:

3 Click the GIS tab.
4 **Layer**—Select the layer for which to view equipment records without corresponding features.

5 **Consider only equipment with a GISOBJID**—Select to only compare equipment records that reference a GISOBJID number. The GISOBJID number is referenced on the Infor EAM equipment record in the GIS ID field.

   **Note:** If you unselect **Consider only equipment with a GISOBJID**, the system compares equipment records that do not have a GIS ID but do reference a GIS Profile or GIS layer.

6 Click **View Discrepancies**. The system displays equipment records for which there are no corresponding features. The system automatically populates **Layer**, **Location X**, and **Location Y** for each equipment record if available.

   **Note:** The system only displays equipment records for which you have query web service permissions. Contact your system administrator for more information.

7 **Select**—Select the equipment records for which you want to create corresponding features. The system automatically selects all of the equipment records. Remove individual records from the list by unselecting the line.

   **Note:** To select all lines at once, click **Select All**. To unselect all lines at once, click **UnselectAll**.

8 **Layer**—Select a layer for each equipment record for which you want to create corresponding features.

9 **Location X** and **Location Y**—Enter the X and Y coordinates for each equipment record for which you want to create corresponding features.

   **Note:** Highlight the equipment record within the list, click **Record**, and then click the location on the map within ESRI's ArcMap page on which to place the feature. The system determines the X and Y coordinates and automatically populates **Location X** and **Location Y**.

   If the selected layer contains line or polygon features, click on the map more than once to include all necessary coordinates for the feature. The system saves the additional X and Y coordinates.

   If you enter **Location X** and **Location Y** with the **Record** button and then need to edit the fields with the **Record** button, you must first right-click on the equipment record, and then select **Clear Map Coordinates**.

10 Click **Create Feature(s)**. The system creates corresponding features within ESRI’s GIS for each selected equipment record and highlights the newly created features on the map. The system populates **Result** and **Creation Date/Time** and unselects all equipment records for which corresponding features were created.

   **Note:** If the system cannot create a corresponding feature for a selected equipment record, it displays the reason in **Result**. The equipment record remains selected.

---

**Synchronizing attributes (ESRI)**

Infor EAM and ESRI’s GIS attributes may be synchronized based on the field mappings defined for each layer. The system compares the attributes of corresponding features/equipment (based on the
**GISOBJID/GIS ID**, provides you with a list of discrepancies, and enables you to synchronize the attribute values.

Field mappings are not defined for a feature/equipment record’s layer, location X, and location Y. The system synchronizes based on an implied mapping where GIS is the owner and the data is automatically mapped to the **Layer**, **Location X**, and **Location Y** fields in Infor EAM. If a feature is a line or polygon feature, the system populates the Infor EAM **Location X** and **Location Y** based on the feature’s center point. Contact your system administrator for more information.

**Note:** Infor EAM recommends synchronizing features and equipment prior to synchronizing attributes.

To synchronize attributes:

1. Open **ArcMap** to an existing map.
2. Click **Map**.
3. **Map**—Enter the map for which to synchronize attributes. The system automatically populates the map description and **Map Org**.
4. **Layer**—Select the layer for which to view attribute discrepancies.
5. **Consider only features selected on the map**—Select to only consider features that are selected on the map.
6. Click **View Discrepancies**. The system displays features for which the system locates a corresponding equipment record based on the **GISOBJID**, but for which there are attribute discrepancies.
   
   **Note:** The system only considers mapped attributes that have an **Action** of Copy. Contact your system administrator for more information.

   You must have query web service permissions in Infor EAM to view discrepancies. Contact your system administrator for more information.

7. **Select**—Select the features for which you want to synchronize attribute discrepancies.
   
   The system automatically selects all of the features. Remove individual features from the list by unselecting the line.
   
   **Note:** To select all lines at once, click **Select All**. To unselect all lines at once, click **UnselectAll**.

8. Click **Synchronize Discrepancies**. The system synchronizes the attributes.
   
   The system synchronizes attributes based on the values contained within the owner system of the field mapping record. Contact your system administrator for more information.
   
   **Note:** The system displays an error message in either Infor EAM **Result** or **GIS Result** for any record whose discrepancies cannot be synchronized.

   You must have update web service permissions in Infor EAM to synchronize discrepancies. Contact your system administrator for more information.

9. Click **Close**.

**Synchronizing attribute details (ESRI)**

To synchronize attribute details:
1 Open ArcMap to an existing map.

2 View attribute discrepancies.

   **Note:** Do not click **Synchronize Discrepancies**.

3 Highlight the feature for which to view discrepancy details, and then click the **Details** tab.
   The system automatically populates **Layer**, **Equipment**, **FID**, **Description**, and **Org.** and displays a list of field mapping records for the feature.

   **Note:** The system only displays discrepancy mapping records with an **Action** of Copy. Contact your system administrator for more information.

4 View the discrepancy records. The system displays the **GIS Attribute** and its data in **GIS Value** and the corresponding Infor EAM **Attribute** and its data in Infor EAM **Value**. The **Owner** indicates the system from which the data will be copied during synchronization.

   **Note:** If multiple GIS attributes are mapped to a single Infor EAM attribute or vice-versa, the system lists the attributes on separate lines but groups them together.

   During synchronization, the system concatenates or parses data according to the **Sequence** and **Delimiter** defined on the field mapping record. Contact your system administrator for more information. 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 system does not synchronize the data. If, however, the source field in the owner system contains a null value, the system copies the null value to the multiple fields in the other system and overwrites any data that those fields originally contained.

5 **New Owner Value**—Enter a value to override the current data contained within the owner system.

   During synchronization, the system writes the new value to the owner system and then copies the value to the other system.

   **Note:** You cannot enter a **New Owner Value** if there is a discrepancy with a **Layer**, **Location X**, or **Location Y**. These values are populated automatically based on the feature’s actual map location.

6 Click **Synchronize Discrepancies**. The system synchronizes the attributes.

   The system synchronizes the attributes based on the values contained within the owner system or based on the values entered in **New Owner Value**.

   **Note:** The system displays an error message in either Infor EAM Result or **GIS Result** for any record whose discrepancies cannot be synchronized.

   Click  or  to view the details of the next or previous discrepancy record within the list on the **Synchronize Attributes** page.

7 Click **Close**.
Applying a data filter (ESRI)

Create a filter for integrated features based on attribute data stored in either ESRI, Infor EAM, or both. ESRI highlights the GIS features that satisfy the search criteria on the GIS map.

See the following list of Infor EAM grids that the system queries:

<table>
<thead>
<tr>
<th>Grid</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>BEGEQ</td>
</tr>
<tr>
<td>Equipment and related cost details</td>
<td>BEGEQC</td>
</tr>
<tr>
<td>Equipment and related event details</td>
<td>BEGEQE</td>
</tr>
<tr>
<td>Work order and related activity details</td>
<td>BEGWAC</td>
</tr>
<tr>
<td>Work order and related equipment details</td>
<td>BEGWEQ</td>
</tr>
</tbody>
</table>

Note: The system only queries those grids to which you have Query access. If you do not have access to a grid, contact your system administrator to grant you access to its related function.

Running a data filter (ESRI)

To run a data filter:

1. Within ESRI, click 🗺. Follow steps 2 and 3 to enter the filter’s GIS Criteria.
   
   Note: Highlight features on the GIS map prior to opening the Data Filter popup, and then select Consider only features highlighted on the map. The system only considers the highlighted features in the search.

2. Layer—Select a GIS layer.

3. Filter—Enter filter information for features.
   
   Note: The available fields are based on the selected Layer.
   
   Follow steps 4 and 5 to enter the filter’s Infor EAM Criteria.


5. Filter—Enter filter information for equipment records.
   
   Note: The available fields are based on the selected Grid.

6. Click Select Custom Fields to select the custom fields to display on the Results page. The system displays the Select Custom Fields popup.
   
   Note: The displayed fields are based on the selected Grid.

7. Select the custom fields to display on the Results page, and then click Submit. The system closes the Select Custom Fields popup.
**Note:** Search response time increases as the selected number of custom fields increases.

8 Click **Apply**. The system runs a search based on the criteria and displays Infor EAM data that satisfies the filter on the **Results** page.

### Saving filter criteria (ESRI)

Save filter criteria so it can be accessed in the future, reducing the amount of time it takes to run common searches.

To save filter criteria:

1. Within ESRI, click **Apply**. Follow steps 2 through 5 to save a GIS criteria record.
2. Select a **Layer**, and then enter **Filter** information.
3. **Set As Default**—Select to identify this criteria as the default GIS criteria record.
   - **Note:** If you select **Set As Default**, the system automatically displays this GIS criteria record whenever you open the Data Filter popup.
4. Click **Save As**.
5. Enter the file name, select a file type, and then click **Save**. The system populates **Criteria** with the file name.
   - **Note:** Save the file as either an .XMLGIS or .EXP file. If you save the file as an .EXP file, the system clears filter information and displays **WHERE Clause**, **Edit Query**, and **Reset Filter**. Modify the **WHERE Clause** as necessary. Click **Edit Query** to open ArcMap’s Select By Attributes popup. Click **Reset Filter** to enable the filter lines, and then modify the filter as necessary.
   - Follow steps 6 through 9 to save an Infor EAM criteria record.
6. Select a **Grid**, enter **Filter** information, and select custom fields to display on the **Results** page.
7. **Set As Default**—Select to identify this criteria as the default Infor EAM criteria record.
   - **Note:** If you select **Set As Default**, the system automatically displays this Infor EAM criteria record whenever you open the Data Filter popup.
8. Click **Save As**.
9. Enter the file name, and then click **Save**. The system saves the file, closes the dialog box, and populates **Criteria** with the file name.
   - **Note:** The file type must be .xmlinforEAM.
10 Click **Apply**. The system runs a search based on the criteria and displays Infor EAM data that satisfies the filter on the **Results** page.
Running existing data filters (ESRI)

Select saved criteria records to quickly run searches.

**Shortcut:** If you selected **Set As Default** for a saved GIS or Infor EAM criteria record, the system automatically displays it when you open the Data Filter popup.

To run existing data filters:

1. Within ESRI, click \( \sqrt{ } \).
   Follow step 2 to enter the GIS Criteria.

2. **Criteria**—Enter an existing GIS criteria record. You may enter a saved file type of either .EXP or .XMLGIS.
   The system automatically populates **Layer** and either **Filter** or **WHERE Clause**.
   Follow step 3 to enter the Infor EAM Criteria.

3. **Criteria**—Enter an existing Infor EAM criteria record. You may enter a saved file type of either .EXP or .XMLINFOREAM.
   The system automatically populates **Grid** and **Filter**.

4. Click **Apply**. The system runs a search based on the criteria and displays Infor EAM data that satisfies the filter on the **Results** page.

Viewing data filter results (ESRI)

To view data filter results:

1. Within ESRI, click \( \sqrt{ } \).

2. Apply a filter, and then click the **Results** tab.

   **Note:** The system automatically displays the **Results** page if the criteria includes an Infor EAM Grid.

   The system displays Infor EAM records that satisfy the defined criteria. See the following list for more information regarding the results:
   - **If you defined both GIS and Infor EAM Criteria**—The system displays filter results that reference GIS-integrated equipment records. The system includes all fields associated with the selected **Grid** and any selected custom fields.
   - **If you only defined GIS Criteria**—The system does not display filter results.
   - **If you only defined Infor EAM Criteria**—The system displays filter results that reference all equipment records. The system includes all fields associated with the selected **Grid** and any selected custom fields.

3. View the Infor EAM records.

   **Note:** To remove records from the list, highlight the record(s) to remove, and then click **Remove Highlighted Record(s)**.

4. Click **Save As**.
GIS integration

5  Enter the file name, select a file type, and then click **Save**.

   **Note:** The default file type is .CSV. If you save the file as a .DBF file, the file is available within the GIS map as a data table.

6  Click **Close**.

Performing Infor EAM functionality (ESRI)

Access Infor EAM functionality via the Infor EAM GIS Extensions in ESRI's **ArcMap**. Create Infor EAM work orders and view Infor EAM events for any GIS feature that is integrated with Infor EAM.

**Note:** You can also define Infor EAM equipment records, synchronize records, and create data filters via the Infor EAM GIS Extensions. Also, define user information and preferences. Contact your system administrator for more information.

Many of the Infor EAM forms accessible in ESRI display a grid with a list of records. Select the record(s) or field(s), and then right-click to access additional functionality. See the following table for more information:

<table>
<thead>
<tr>
<th>Right-Click Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear Map Coordinates</td>
<td>Clear map coordinates associated with the record</td>
</tr>
<tr>
<td>Identify Feature(s)</td>
<td>View the GIS attributes of an equipment record</td>
</tr>
<tr>
<td>Memo Editor</td>
<td>View the full text of a field</td>
</tr>
<tr>
<td>Record View</td>
<td>View the information pertaining to a record in a vertical list</td>
</tr>
<tr>
<td>Save As</td>
<td>Save the displayed data as a .csv or .dbf file</td>
</tr>
<tr>
<td>Show Feature</td>
<td>Temporarily highlight the feature on the map</td>
</tr>
</tbody>
</table>

   **Note:** You will not see the highlighted feature if it is not on the map’s visible layer or not within the map’s current extent.

Creating Infor EAM work orders (ESRI)

Locate a feature within the GIS system, and then create an Infor EAM work order. Associate activities, comments, custom field values, and linear reference information to the work orders if necessary.

You can only create an Infor EAM work order for a GIS feature that has a corresponding Infor EAM equipment record. In addition, the equipment record cannot have a status of Withdrawn, In Transit, or Awaiting Purchase or be out of service.
To create an Infor EAM work order within GIS, you must have permission to create work orders within Infor EAM. Contact your system administrator for additional information.

To create Infor EAM work orders within GIS:

1. Within ESRI, select a feature, and then click [button].
   The system automatically populates Equipment, WO Organization, Department, Location, Cost Code, Criticality, Safety, Assigned To, and Assigned By based on the corresponding equipment record of the selected feature.

2. **WO Description**—Enter a description of the work needed.
3. **WO Organization**—Enter the organization to which the work order belongs.
4. **Status**—Select the status of the work order.
5. **Type**—Select the work order type.
6. **Priority**—Select the priority level of the work order.
7. **Problem Code**—Enter the problem code.
8. **Class**—Enter the class of the work order.
9. **Department**—Enter the department responsible for completing the work order.
10. **Location**—Enter the location of the work to be completed.
11. **Cost Code**—Enter the cost code of the work order.
12. **Criticality**—Select a criticality code to indicate the relative importance of the asset to the overall production of goods or services for your organization.
13. **Standard WO**—Enter the standard work order if applicable.
14. **Safety**—Select to observe safety precautions when working with this asset.
15. **Sched. Start Date** and **Sched. End Date**—Select the starting and ending dates for the work order.
16. **Date Reported**—Enter the date and time that the problem was reported.
17. **Assigned To**—Enter the username of the person responsible for the work order.
18. **Assigned By**—Enter the supervisor who assigned the work order.
19. Enter activities, comments, custom fields, and linear reference information.
20. Click **Submit**. The system saves the work order and any information entered on the Activities, Comments, Custom Fields, and/or Linear References pages.

### Defining activities

To define activities:

1. Enter work order details.
2. Click the **Activities** tab.
3. Click **Add Activity**.
   The system automatically populates Activity with the next available activity number, populates **Start Date** and **End Date** with the scheduled start date of the work order, and populates **People Required** with a default value of "1."
4. **Activity**—Modify the activity number as necessary.
5. **Trade**—Enter the trade required to perform the activity.
6 **Estimated Hours**—Enter the estimated number of hours required to complete the activity.
7 **People Required**—Modify the number of people required to perform the activity as necessary.
8 **Completed**—Select if the activity is completed.
9 **Task**—Enter the task code for the activity. The system updates the value for **People Required** to correspond with the **Task** as necessary.
10 **Material List**—Enter the code identifying the material list that contains the parts needed for the activity.
11 **Activity Comments**—Enter comments or instructions for the activity.
12 **Click Add to List.**
13 Enter comments, custom fields, and linear reference information for the work order.
14 **Click Submit.** The system saves the work order and any information entered on the Activities, Comments, Custom Fields, and/or Linear References pages.

**Associating comments**

To associate comments:

1 Enter work order details.
2 **Click the Comments tab.**
3 **Comments**—Enter comments or instructions for the work order.
4 **Print with WO**—Select to print the comments with the work order.
5 Enter activities, custom fields, and linear reference information for the work order.
6 **Click Submit.** The system saves the work order and any information entered on the Activities, Comments, Custom Fields, and/or Linear References pages.

**Entering custom fields**

To enter custom fields:

1 Enter work order details.
2 **Click the Custom Fields tab.**
   The system automatically displays custom fields specific to the class and/or work order entity.
3 Enter the custom fields information.
4 Enter activities, comments, and linear reference information for the work order.
5 **Click Submit.** The system saves the work order and any information entered on the Activities, Comments, Custom Fields, and/or Linear References pages.

**Defining linear reference details**

To define linear reference details:

1 Enter work order details.
2 Click the **Linear Details** tab.

3 **From Point**—Enter the point on the linear equipment record from which to perform the work order. The system automatically populates **Ref. Description** and **Geographical Ref.** if available.

4 **To Point**—Enter the point on the linear equipment record to which to perform the work order. The system automatically populates the **Ref. Description** and **Geographical Ref.** if available.

5 Enter activities, comments, and custom fields for the work order.

6 Click **Submit**. The system saves the work order and any information entered on the Activities, Comments, Custom Fields, and/or Linear References pages.

---

**Viewing Infor EAM events (ESRI)**

View a history of all events performed within Infor EAM for a GIS feature's corresponding equipment record. View such events as work orders.

**Note:** You cannot update any event records on the Infor EAM Events popup.

To view Infor EAM events within GIS:

1 Within ESRI, select an integrated feature(s), and then click ![ ].
   - The system automatically displays all of the selected features in the Equipment list. The system displays the total number of selected equipment records next to **Equipment**, populates **Total Events** with the total number of events for all equipment records within the Equipment list, and displays the number of events for the selected equipment record next to **Events**.

2 In the Equipment list, double-click the equipment record from the Equipment list for which to view events.
   - **Note:** If you double-click a linear equipment record, the system enables **From Point** and **To Point**.

3 **From Point**—Enter the point on the linear equipment record from which to display events.

4 **To Point**—Enter the point on the linear equipment record to which to display events.

5 View the events information in the Events list.
   - **Note:** The Dataspyp available on this popup is defined on the **Events** page of the Assets, Positions, or Systems form of Infor EAM.

6 Click **Close**.

---

**Performing a GIS map search (Infor EAM)**

Perform a GIS map search to locate equipment according to address or equipment type, e.g., asset, position, or system.

The system searches map layers. A **layer** contains a set of thematic data, e.g., streets, hydrants, or pipes. A GIS map contains multiple layers, which create overlays of geographical information.
Infor EAM searches GIS maps based on active and buffer layers. The active layer is the layer in which a search originates. If your search involves multiple layers, the buffer layer is the layer in which the equipment for which you are searching resides, e.g., your GIS map contains a Pipe layer and a Hydrant layer. You want to locate a fire hydrant based on the location of a specific pipe. Select the Pipe layer as your active layer and the Hydrant layer as your buffer layer. The system searches for the pipe in the Pipe layer and returns fire hydrants found within the Hydrant layer. See the following image:

Note: If you are performing a search based on an address, you do not need to specify an active layer. The system originates its search in the address layer, which is defined by installation parameter GISADDR.

Once you have performed a map search, use the GIS Map Search toolbar to modify the map view. Note: If you click on any form within Infor EAM to enter the GIS Map Search form, the system automatically displays the previous map search as long as it occurred within the same user session, e.g., you perform a map search in the GIS Map Search form, and then open the Assets form. From the Assets form, click . The system displays the GIS Map Search form with your previous search displayed on the map.

If you use geocoding services, the system performs address searches based on the primary geocode as defined in installation parameter GISSERV. If the system does not find any records that match your search criteria, it performs the search based on the secondary geocode as defined in installation parameter GISGEOSV. Contact your system administrator for more information.

Performing a basic map search (Infor EAM)

Perform a basic map search to search for equipment in one layer.

To perform a basic map search:

1. Open the GIS Map Search form.
   Note: Click ▼ to view and enter advanced search criteria.

2. Search For—Select one of the following options:
   Note: To search for all records that contain like characters in Address, Street, Equipment, Asset, Position, or System, enter "%," e.g., if you want to search for all assets beginning with the letter "M," enter "M%" in Asset. If you want to search for all positions containing the letters "PMP," enter "%PMP%" in Position.
   • Address—The system displays the Street and Zone fields. Enter the street address and/or zone location for which to search.
     Note: To search for intersections, enter the street names with the appropriate separator as defined in installation parameter GISINTRS, e.g., Main & Broadway.
GIS integration

- **Equipment**—The system displays the Equipment field. The system populates the equipment lookup with GIS-integrated equipment records in Infor EAM that are installed, in use, and are associated with the organizations to which you have rights. Enter the equipment for which to search.

- **Asset**—The system displays the Asset field. The system populates the asset lookup with GIS-integrated asset records in Infor EAM that are installed, in use, and are associated with the organizations to which you have rights. Enter the asset for which to search.

- **Position**—The system displays the Position field. The system populates the position lookup with GIS-integrated position records that are associated with the organizations to which you have rights. Enter the position for which to search.

- **System**—The system displays the System field. The system populates the system lookup with GIS-integrated system records that are associated with the organizations to which you have rights. Enter the system for which to search.

**Note:** If you enter a linear equipment record in Equipment, Asset, Position, or System, the system automatically displays and populates From Point and To Point. Edit the equipment’s From Point and To Point via the map.

3 **Radius**—Enter the radius in which to search, and then select the unit of measure (Feet, Meters, Kilometers, Miles) in the adjacent field.

**Note:** If your search is for a linear equipment record, enter a radius and unit of measure to create a buffer around the linear equipment record on the map. The system searches for all GIS-integrated equipment records that fall within the from and to point along the linear equipment record.

4 Choose one of the following options:
   - **To search for an address**—Select a Buffer Layer to identify the layer in which the equipment for which you are searching resides. The system originates its search in the address layer.
   - **To search for equipment, assets, positions, or systems**—Select an Active Layer to identify the layer in which to search for equipment. In a basic equipment search, the system originates its search in this layer and returns equipment that resides in this layer.

**Note:** If possible, the system automatically defaults the Active Layer for the equipment, asset, position, or system record for which you are searching. Editing the Active Layer results in a search with no results.

5 **Dataspy**—Select a search parameter based on the work order or equipment parameters.

6 **GIS Filter**—Select a GIS Filter.

7 Click **Search**. The system displays the search results in the Equipment Within Search Area list and on the map.

**Note:** If you use geocoding services and you entered a street name and number in Address, ArcIMS may return more than one address matching your search criteria. If multiple addresses match your search criteria, the system displays the Matching Addresses popup. The popup lists the addresses that match the search criteria and displays a Match Score, which ArcIMS assigns, for each address. The closer the Match Score is to 100, the more likely the corresponding address is the address for which you are searching. Select the address or addresses to view on the map, and then click **Submit**. The system displays the map.
If your search is for a linear equipment record, the system highlights the length of the equipment record defined between the From Point and To Point and GIS-integrated equipment records that fall within the linear equipment record’s buffer.

Double-click an equipment record to view the record details if you opened the GIS Map Search form via the menu bar.

Choose one of the following options, if necessary:

- To view a list of work orders for the equipment highlighted in the list—Click Create WO. The system displays the View Work Orders list. Click View Customer Equipment to toggle to the Equipment Within Search Area list.
  
  Note: Double-click a work order record to view the record details.

- To expand the Equipment Within Search Area list or the Work Orders Within Search Area list—Click ▲ or ▼.

Performing an advanced map search (Infor EAM)

Perform an advanced GIS search to search for equipment across multiple layers. In addition, you may apply a GIS filter and specify a search radius for each selected layer.

To perform an advanced map search:

1. Open the GIS Map Search form.
2. Click ▼. The system expands the Map Search section of the form to display the Advanced Search options.
3. Map—Enter the map for which to perform an advanced search. The system automatically populates the map description and Organization.
   
   Note: Map is available only when GISMAPS installation parameter is set to Organization or Department.
4. Search For—Select to perform your search based on Address, Equipment, Asset, System, or Position, and then enter the related fields as necessary.
5. Dataspy—Select a dataspy.
   
   Note: Click Edit to create a Dataspy.
   
   Complete steps 5 and 6 only if you selected to base your search on equipment.
   
   Note: If you selected Address in Search For, you do not need to specify an Active Layer. The system originates its search in the address layer as defined by installation parameter GISADDR.
6. Active Layer—Select the layer in which the search should originate.
7. GIS Filter—Select a GIS filter.
   
   Note: Click Edit to create a GIS filter.
8. Buffer Layers—Select the layer in which the equipment for which you are searching resides.
9 **GIS Filter**—Select a GIS filter for the specified layer.

   **Note:** Click **Edit** to create a GIS filter.

10 **Radius**—Enter the radius in which to search, and then select the unit of measure in the adjacent field.

11 Select additional **Buffer Layers** and specify a **GIS Filter** and **Radius** for each layer, as necessary.

   **Note:** Click ![add line](image) to add an additional line. You may add a maximum of ten lines.

12 Click **Search**. The system displays the search results in the Equipment Within Search Area list and on the map.

   **Note:** If you use geocoding services and you entered a street name and number in **Address**, **ArcIMS** may return more than one address matching your search criteria. If multiple addresses match your search criteria, the system displays the Matching Addresses popup. The popup lists the addresses that match the search criteria and displays a **Match Score**, which **ArcIMS** assigns, for each address. The closer the **Match Score** is to 100, the more likely the corresponding address is the address for which you are searching. Select the address or addresses to view on the map, and then click **Submit**. The system displays the map.

   If your search is for a linear equipment record, the system highlights the length of the equipment record defined between the **From Point** and **To Point** and GIS-integrated equipment records that fall within the linear equipment record’s buffer.

   Double-click an equipment record to view the record details if you opened the **GIS Map Search** form via the menu bar.

13 Choose one of the following options, if necessary:

   • **To view a list of work orders for the equipment highlighted in the list**—Click **Create WO**. The system displays the View Work Orders list. Click **View Customer Equipment** to toggle to the Equipment Within Search Area list.

     **Note:** Double-click a work order record to view the record details.

   • **To expand the Equipment Within Search Area list or the Work Orders Within Search Area list**—Click ![expand](image) or ![expand](image).

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**GIS map search toolbar (Infor EAM)**

See the following descriptions when accessing buttons on the GIS Map Search toolbar:

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="button" /></td>
<td><strong>Toggle Overview Map</strong>—Displays/removes an overview map in the upper left-hand corner of the main map. If the overview map is displayed, the system</td>
</tr>
</tbody>
</table>

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*Infor EAM – User's Guide | 725*
<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>outlines the current extent of the main map within the overview map in red. <strong>Note:</strong> If you click and drag to select an area within the overview map, the system highlights the area within the overview map and updates the extent of the main map.</td>
</tr>
<tr>
<td></td>
<td><strong>Zoom to Full Extent</strong>—Displays the full extent map defined in ESRI.</td>
</tr>
<tr>
<td></td>
<td><strong>Zoom In</strong>—Displays a magnification of the map area selected. Records displayed in the Equipment Within Search Area list will continue to be based on the search criteria.</td>
</tr>
<tr>
<td></td>
<td><strong>Zoom Out</strong>—Displays a larger view of the map area selected. Records displayed in the Equipment Within Search Area list will continue to be based on the search criteria.</td>
</tr>
<tr>
<td></td>
<td><strong>Pan</strong>—Changes the focus of the map center. Records displayed in the Equipment Within Search Area list will continue to be based on the search criteria.</td>
</tr>
<tr>
<td></td>
<td><strong>Zoom to Previous Extent</strong>—Refreshes the map to focus on the previous map. Records displayed in the Equipment Within Search Area list will continue to be based on the search criteria.</td>
</tr>
<tr>
<td></td>
<td><strong>Select by</strong>—Select the method to draw over the desired map area. Choose one of the following options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Select by Rectangle</strong>—Select to form a rectangle over the desired map area.</td>
</tr>
<tr>
<td>Button</td>
<td>Function</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Select by Polygon</td>
<td>Select at least three points to form a polygon over the desired map area.</td>
</tr>
<tr>
<td>Select by Line</td>
<td>Select to draw a line between at least two points on map.</td>
</tr>
<tr>
<td>Select by Circle</td>
<td>Select to form a circle over the desired map area.</td>
</tr>
<tr>
<td>Pointer</td>
<td>Displays the equipment within the point or area selected on the map.  The Equipment Within Search Area list will refresh to display equipment within the selected area on the map.</td>
</tr>
<tr>
<td>Print</td>
<td>Opens a new window and displays the standard Windows Print dialog box.</td>
</tr>
<tr>
<td>Previous Search</td>
<td>Displays a list of the last five searches if they occurred within the current user session and were initiated by clicking Search. The first search displayed in the list is the most recent search performed. Select a search, and the system displays the selected map and GIS Map Search form. Note: The system displays the map based on your current settings and visible layers.</td>
</tr>
<tr>
<td>Select Features</td>
<td>Highlights and numbers features on the map. The system also highlights the corresponding equipment records in the Equipment Within Search Area list.</td>
</tr>
<tr>
<td>Sketch</td>
<td>Draws on the map. Click anywhere on the map to</td>
</tr>
<tr>
<td><strong>Button</strong></td>
<td><strong>Function</strong></td>
</tr>
<tr>
<td>------------</td>
<td>--------------</td>
</tr>
<tr>
<td><img src="image" alt="Place Marker" /></td>
<td>place a map marker or click and drag to draw a line on the map.</td>
</tr>
<tr>
<td><img src="image" alt="Measure" /></td>
<td><strong>Measure</strong>—Highlights the distance between two points on the map and displays the distance between the two points. The Measure tool calculates two distances: the current segment and a cumulative distance, e.g., if you select feature A and then feature B, the system displays the distance between features A and B. If you then select feature C, the system displays the distance between features B and C (the current segment) and the distance between features A and C (the cumulative distance). <strong>Note:</strong> The system measures the distance based on the unit of measure defined for <strong>Radius</strong>.</td>
</tr>
<tr>
<td><img src="image" alt="Identify Features" /></td>
<td><strong>Identify Features</strong>—Displays the attributes of map features within a map’s visible layers.</td>
</tr>
<tr>
<td><img src="image" alt="View Nearest Address" /></td>
<td><strong>View Nearest Address</strong>—Displays the nearest address to a selected point on the map.</td>
</tr>
<tr>
<td><img src="image" alt="Visible Map Layers" /></td>
<td>Displays the Visible Map Layers popup. Select the layers to display in the GIS map, and then click <strong>Submit</strong>. <strong>Note:</strong> The system creates and displays temporary layers in the event you highlight or mark the map. Un-select a temporary layer to remove its markup from the map. See the table below for more information.</td>
</tr>
<tr>
<td>Button</td>
<td>Function</td>
</tr>
<tr>
<td>--------</td>
<td>----------</td>
</tr>
<tr>
<td></td>
<td>The system saves visible layers, with the exception of temporary layers, according to your user ID. When you open the GIS Map Search form, the system automatically displays your saved visible layers.</td>
</tr>
<tr>
<td>![Legend icon]</td>
<td>Displays a legend of icons for each type of feature on the GIS map</td>
</tr>
<tr>
<td>![Expand icon]</td>
<td>Expands the map to the full extent of your screen. Click ▲ to restore the map to its original size</td>
</tr>
</tbody>
</table>

## Selecting features on the GIS map (Infor EAM)

Select integrated features on the GIS map. For every feature that you select on the map, the system automatically highlights its corresponding equipment record in the Equipment Within Search Area list and highlights associated work orders in the View Work Orders list.
Select features on the map to perform basic GIS Map Search functions on multiple equipment records, e.g., create a route work order.

**Note:** You can also select equipment records on the Equipment Within Search Area list. Click , and then select the equipment records in the list. The system automatically highlights the corresponding equipment record on the GIS map. Press SHIFT or CTRL to select multiple equipment records at one time.

To select equipment records on the GIS map:

1. Perform a GIS Map Search.
2. Click , and then select highlighted features on the map. The system changes the highlighted color of the features and numbers the features in the order that you select them.
   
   **Note:** Install parameter GISSFCLR determines the color with which the system highlights the selected records.

   Unselect features as necessary. The system updates the numbers of the remaining selected features.

   To select multiple features on the map at one time, click , and then click and drag on the GIS map to include the desired area. The system highlights all of the features contained within the area and numbers them randomly.

**Identifying features (Infor EAM)**

View feature attributes within the map’s visible layers.

To identify features:

1. Perform a GIS Map Search.
2. Choose one of the following options:
   
   - Click , and then click on the GIS map to select a point or drag to select an area for which to view features.
   - Select the equipment or work order(s) for which to view corresponding feature attributes in the Equipment Within Search Area or View Work Orders list. Select **Identify Features** in **Options**, and then click **Submit**.
     
     **Note:** To view the selected features within a layer other than the active layer, click the plus sign (+) next to the layer. The system displays the layer’s selected features.

     The system highlights features in blue if the feature’s corresponding equipment or work order record is listed in the Equipment Within Search Area or View Work Orders list. The system highlights all other features in white.

3. Click the plus sign (+) next to the FID# for which you want to view attributes.
4. View the attributes.
Viewing the nearest address (Infor EAM)

**Note:** To enable the view nearest address feature, a value must be entered for the `GISSVAXL` installation parameter. Contact your system administrator for more information.

To view the nearest address:

1. Open the **GIS Map Search** form.
2. Choose one of the following options:
   - Click 🗺️, and then click on the GIS map to select a point for which to view the nearest address.
     **Note:** The system displays the address of the closest feature in the address layer within the radius, in meters, as specified by installation parameter `GISNARAD`.
     If the closest feature is linear and your geocoding style contains a range, the system approximates the street number.
   - Perform a GIS Map Search, and then select the equipment or work order record(s) for which to view the nearest address in the Equipment Within Search Area or View Work Orders list. Select View Nearest Address in **Options**, and then click **Submit**.
     **Note:** The system displays the nearest address for each record’s corresponding feature.
     If the corresponding feature is a linear or polygon feature, the system determines the address based on the first point of the feature.
3. View the address information.

Creating GIS filters (Infor EAM)

A GIS Filter, similar to a Dataspy, is a named, predefined search based on GIS attributes accessed on the **GIS Map Search** form. Create GIS Filters that are specific to individual layers.

A GIS Filter allows you to apply a second level of conditional filters to your map search: filter for equipment records using the Dataspy, and then filter for specific GIS attributes using the GIS Filter.

**Note:** To copy the values from an existing GIS Filter into a new GIS Filter, select the existing filter in the text box, and then click **Copy**. Edit the GIS Filter criteria as necessary.

**Note:** If you define a GIS Filter for which the system returns no data, the probable cause is that the column headers within ESRI do not contain all uppercase letters.

To create GIS Filters:

1. Click **Edit**.
2. Click **New**.
3. Enter a title for the GIS Filter in the text box.
4. Edit the GIS Filter criteria as necessary. Edit GIS Filter criteria in the same manner that you edit Dataspy criteria.
   **Note:** Click **Cancel New** to cancel the creation of a new GIS Filter and return to the previous view.
Select Default Dataspy to save the selected GIS Filter as the default filter for the active layer specified on the GIS Map Search form. You can have one default filter for each of your active layers.

5 Click Save. The system applies the GIS Filter to the GIS map search.

Adjusting the range of linear equipment (Infor EAM)

Adjust the From Point and/or To Point of a linear equipment record to edit the extent of your map search or to adjust the extent of the equipment record on which work should be performed.

To adjust the range of linear equipment:

1 Perform a GIS Map Search.
   Note: You can also adjust the From Point or To Point on the View GIS Map popup accessed from the Work Orders form.

2 Click to adjust the linear equipment record's From Point or To Point.

3 Click the map at the location along the linear equipment record to which to adjust the point.
   The system populates From Point or To Point with the new value and marks the boundaries of the equipment's current range based on the new value.

4 Click Submit. The system performs a search based on the new range of the linear equipment record.
   Note: From the View GIS Map popup accessed from the Work Orders form, the system closes the popup and populates the From Point and To Point of the work order based on the points that you selected on the map.

Creating quick work orders (Infor EAM)

Create a quick work order for any equipment displayed in the Equipment Within Search Area list. This functionality allows you to locate a specific piece of equipment on the map and create a work order and activity without opening the Work Orders form.

To create quick work orders:

1 Perform a GIS Map Search.

2 Select the equipment record for which to create a work order.

3 Options—Select Create Quick WO, and then click Submit.

4 Enter the information necessary to create the work order.

5 Enter linear reference information.
   Note: The system only displays Linear Reference Details if the equipment record for which to create the work order is a linear equipment record.

6 Enter the information necessary to add the first activity to the work order.
Creating work orders (Infor EAM)

Create a work order for any equipment displayed in the Equipment Within Search Area list via the Work Orders form.

To create work orders:

1. Perform a GIS Map Search.
2. Select the equipment record for which to create a work order.
3. Options—Select Create WO, and then click Submit. The system displays the Work Orders form.
4. Enter the information necessary to create the work order.
5. Click Submit. The system saves the information to the database and displays a message asking whether or not you want to associate the GIS map with the work order.
6. Click Yes to associate the map with the work order. The system creates a PDF file of the currently displayed map and attaches the PDF to the work order as a linked document.
7. Enter additional information on each page of the Work Orders form as necessary, and then click Close. The system closes the Work Orders form.

Creating multiple equipment work orders (Infor EAM)

Create a work order with multiple pieces of equipment displayed in the Equipment Within Search Area list via the Work Orders form.

To create multiple equipment work orders:

1. Perform a GIS Map Search.
2. Select the equipment records for which to create a work order.
3. Options—Select Create WO, and then click Submit.
4. Enter the information necessary to create the work order.

Note: The first piece of equipment selected displays on the Record View of the Work Orders form; all equipment displays on the Equipment page of the Work Orders form.

Department Security is enforced on this form. User must have more than read-only access for the department.

This functionality is not affected by ROUTEEOB installation parameter.

Additional equipment may be added to the work order once the popup is open; however, the attached map will not reflect the equipment change.
5 Click **Submit**. The system displays a message asking whether or not you want to associate the GIS map with the work order.

6 Click **Yes** to associate the map with the work order. The system creates a PDF file of the currently displayed map and attaches the PDF to the work order as a linked document.

7 Enter additional information on each page of the **Work Orders** form as necessary, and then click **Close**.

---

**Scheduling work order activities (Infor EAM)**

Schedule work order activities according to geographic location. To schedule a work order activity, first create the work order activity, and then schedule it. Search for equipment for which there are open work orders, and then schedule labor based on location for convenience.

The Work Order Activities list displays a separate record for every work order, activity, and schedule combination. The system displays work orders without activities in the grid, but each work order must have an activity in order to schedule it.

To schedule work order activities:

1. Perform a GIS Map Search.
2. Select the work order to schedule.
3. **Options**—Select **Schedule WOs**, and then click **Submit**.
4. **From Point**—Enter the point on the linear equipment record from which to display work order activities.
5. **To Point**—Enter the point on the linear equipment record to which to display work order activities.
   
   **Note:** The system only displays **From Point** and **To Point** if the equipment record for which you are viewing work orders is a linear equipment record.

6. Select the work order activity for which to schedule. The system displays the information for the work order activity in the **Labor Details** section.
7. Click **Add Schedule**.
   
   The system automatically populates **WO-Activity-Trade** with the work order, activity, and trade for the selected work order activity. The system also populates **Scheduled Date** with the scheduled start date of the work order activity, **Act. Est. Hours** with the number of hours planned for the work order activity, **Act. Sched. Hours** with the number of hours scheduled for the work order activity, and **Act. Actual Hours** with the total hours booked to date for the work order activity.
8. **Employee**—Enter the employee who will complete the work order activity.
   
   The system automatically populates **Department**.
9. **Scheduled Date**—Enter the date for which to schedule the work order activity. You cannot schedule work for any date earlier than today’s date.
10. **Scheduled Hours**—Enter the estimated number of hours to complete the work. The number of hours must be between 0 and 24.
11. **Start Time** and **End Time**—Enter the scheduled start time and end time of the work order activity.
12. **Shift**—Enter the shift responsible for completing the work order activity.
13 **Department**—Enter the department responsible for completing the work order activity.

14 **Maintenance Equipment**—Enter equipment on which to perform maintenance during the work order activity.

15 **Comment**—Enter comments about the work order activity.

16 Click **Submit**.

**Note:** To delete a schedule, select the schedule to delete, and then click **Delete Schedule**. You may delete an existing labor schedule that is scheduled for the current date or later if you have made an error entering the data and if you have access rights for deleting the labor schedule. You may only delete labor schedules that have not been frozen or completed.

---

**Copying an existing work order activities schedule (Infor EAM)**

Copy an existing work order activities schedule to add more than one schedule to each work order activity, e.g., you need to schedule an electrician from 9:00 to 10:00 and then, after another work order activity has been completed, the electrician needs to finish the work order activity from 1:00 to 3:00. After you copy the existing schedule, only modify the necessary fields, e.g., **Start Time** and **End Time**. The system maintains the original schedule and creates a new schedule for the work order activity.

**Note:** To schedule additional time to a work order activity immediately after submitting the original schedule, click **Add Schedule**. Modify fields as necessary, and then click **Submit**.

To copy an existing work order activities schedule:

1 Perform a GIS Map Search.
2 Select the work order for which to copy an existing schedule.
3 Select **Schedule WOs**, and then click **Submit**.
4 Select the work order activity schedule to copy, and then click **Copy Schedule**. The system copies the existing labor schedule. The system automatically populates **Employee** and **WO-Activity-Trade** with the employee, work order, activity, and trade for the selected work order. The system also populates **Act. Est. Hours** with the number of hours planned for the work order activity, **Act. Sched. Hours** with the number of hours scheduled for the work order activity, and **Act. Actual Hours** with the total hours booked to date for the work order activity.
5 **Employee**—Enter the employee who will complete the work order activity. The system automatically populates **Department**.
6 **Scheduled Date**—Enter the date for which to schedule the work order activity. You cannot schedule work for any date earlier than today’s date.
7 **Scheduled Hours**—Enter the estimated number of hours to complete the work. The number of hours must be between 0 and 24.
8 **Start Time** and **End Time**—Enter the scheduled start time and end time of the work order activity.
9 **Shift**—Enter the shift responsible for completing the work order activity.
10 **Department**—Enter the department responsible for completing the work order activity.
11 **Maintenance Equipment**—Enter equipment on which to perform maintenance during the work order activity.
12 Comment—Enter comments about the work order activity.
13 Click Submit.

Creating routes and route work orders (Infor EAM)

Create routes according to the geographic location of the pieces of equipment within the route, and then create a work order and activity for the route.

To create routes and route work orders:

1 Perform a GIS Map Search.
2 Select the equipment records on the GIS map in the order in which they should appear in the route.
3 Options—Select Create Route/Route WO.
   The system automatically displays the selected equipment records in the Route list. The system assigns a Sequence number to each equipment record in the order in which you selected the equipment.
   
   Note: The system assigns Sequence numbers according to install parameter INCRLINO.
   To modify the order in which an equipment record appears in the route, place your cursor in the equipment record’s Sequence field on the Route list, and then edit the sequence number.
   To remove a piece of equipment from the route, select the piece of equipment, and then click Remove Equipment. The system removes the record and updates the Route list.
4 Route—Enter a unique code identifying the route, and then enter a description of the route in the adjacent field.
5 Organization—Enter the organization to which the route belongs if you use multi-organization security.
   
   Note: Click View GIS Map to view the current route map.
   If you are not going to create a work order and activity for the route, select Link GIS Map to WO on the View GIS Map popup to link the GIS map to all work orders for the route. Click Submit. The system saves the record and closes the popup. Click Finish on the Create Route page. The system saves the record.
6 Click Next to create a work order and activity for the route.
   
   Note: If PM Revision Control is On, the system disables Next because you cannot approve a route and, therefore, cannot create a work order for the route. Contact your system administrator for more information. Click Finish to save the route without creating a work order. The system saves the route with a status of Unfinished.
   The system automatically populates Equipment with the first piece of equipment within the route and populates Department, Location, Cost Code, and Assigned To if available on the equipment record.
7 Enter the information necessary to create the work order.
8 Enter linear reference information.
Note: The system only displays Linear Reference Details if the equipment record for which to create the work order is a linear equipment record.

9. Enter the information necessary to add the first activity to the work order.
10. Click Finish. The system saves the route, work order, and work order activity records, and automatically sets the status of the route to Approved.

Locating equipment and work orders on the GIS map (Infor EAM)

You can locate one or more pieces of equipment on the GIS map.

To locate equipment and work orders on the GIS map:

1. Perform a GIS Map Search.
2. Select the equipment or work order(s) to locate on the map.
3. Options—Select Highlight on Map, and then click Submit. The system highlights the selected record(s) on the GIS map.

Note: For equipment to display in the Equipment Within Search Area list and display on the map, the equipment must meet the search criteria, exist in both systems, and be linked together in the database.

If you select a work order from the View Work Orders list, the system labels the work order in addition to highlighting it, e.g., "WO 1001."

Viewing Analytics data (Infor EAM)

View analytics data for any equipment in the Equipment Within Search Area list.

Note: This feature is only available if you use Infor EAM Analytics. The View Analytics Data button is displayed for all users, but no data will display in the Analytics Data popup if you do not have Infor EAM Analytics.

To view analytics data:

1. Perform a GIS Map Search.
2. Select the equipment record for which to view analytics data.
3. Options—Select View Analytics Data, and then click Submit.
4. View the Analytics data for the selected equipment.
Viewing child equipment on the GIS map (Infor EAM)

View child equipment on the GIS map and in the Equipment Within Search Area list. The system includes all child equipment records regardless of the search criteria entered for the parent equipment record and regardless of whether the Infor EAM equipment record is linked to a corresponding GIS asset.

After viewing child equipment records, you can create Infor EAM work orders or display Analytics data for the child equipment records.

To show child equipment on the GIS map:

1. Perform a GIS Map Search.
2. Select the equipment record for which to view child equipment.
3. Options—Select Show Children, and then click Submit. The system highlights the parent and child equipment on the GIS map and lists parent and child equipment records in the Equipment Within Search Area list.

   Note: The system displays child equipment records directly below their parent equipment record in the Equipment Within Search Area list.

You cannot apply a quick filter on child equipment records.

Viewing GIS maps (Infor EAM)

View GIS maps for equipment records, routes, and work orders within Infor EAM.

After creating a new GIS map, view it within Infor EAM. View multiple maps for one Infor EAM user.

Note: You cannot view a GIS map for any Infor EAM equipment record that does not contain a GIS ID number. Likewise, you cannot view a GIS map for a route or work order that does not contain at least one equipment record with a GIS ID number.

If you are viewing a GIS map that contains a linear equipment record, see the following information:

• If there is a discrepancy between the length of a corresponding equipment record and feature, the system highlights the equipment record based on the length of ESRI’s GIS feature.
• If the linear equipment record has multiple paths, e.g., a road that forks in multiple directions, the system highlights all paths of the equipment based on the length defined on the equipment or work order’s From Point and To Point.

Viewing GIS maps from equipment records (Infor EAM)

View the GIS map for a piece of equipment and configure the system to link the GIS map to work orders as they are released.

To view GIS maps from equipment records:
1. Open the Assets, Positions, Systems, or Routes form.
2. Select the asset, position, system, or route for which to view a GIS map, and then click the Record View tab.
3. Right-click, and then select View GIS Map. The system displays the View GIS Map popup with the selected equipment record(s) highlighted on the map.
   Note: The system highlights the length of linear equipment records as defined by the From Point and To Point and labels the boundary points of the equipment record.
4. Map—Enter the GIS map for which to view. The system automatically populates the map description and Organization.
5. Link GIS Map To WO—Select to link the GIS map to work orders containing the selected asset, position, system, or route as the work orders are released. When the work order is released, the system links the map to the work order as a PDF, flags it to print whenever the work order is printed, and displays it on the Documents page of the Work Order form.
   Note: You can edit the view of the map, e.g., zoom in, using the GIS Map Search toolbar.
6. Click Submit.
   Note: The system saves the current map settings and visible layers, e.g., if you edit the zoom extent of the map and click Submit, the system opens the map to that zoom extent the next time you view the map.
   Map will be saved if GISMAPS is set to Organization or Department.

Viewing GIS maps from work orders (Infor EAM)

View the GIS map for the work order and associate the map with the work order.

To view GIS maps from work orders:

1. Open the Work Orders form.
2. Select the work order for which to view a GIS map, and then click the Record View tab.
3. Right-click, and then select View GIS Map.
   The system automatically highlights the work order's equipment on the map.
   Note: The system does not display From Point and To Point on the View GIS Map popup if the work order is for a route or if the work order's equipment record is not a linear equipment record. The system only highlights the portion of linear equipment records on which to work as defined by the From Point and To Point of the work order. Edit the work order's From Point and To Point via the map.
4. Associate GIS Map With WO—Select to associate the current GIS map with the work order. The system saves a copy of the current map as a PDF with the work order, flags it to print whenever the work order is printed, and displays it on the Document page of the Work Order form.
   Note: You can edit the view of the map, e.g., zoom in, using the GIS Map Search toolbar.
Creating maps

Create GIS map records to identify the image service when using ArcIMS or the map service when using ArcGIS Server from which the map inside Infor EAM will be based.

Note: This screen is only accessible when GISMAPS installation parameter is set to Organization or Department.

To create GIS maps:

1. Open the Maps form.
2. Click New Record.
3. Organization—Enter the organization of the map.
4. Map—Enter a unique code identifying the map, and then enter a description of the map in the adjacent field.
5. Class—Enter the class of the map. The system automatically populates Class Org.
6. Out of Service—Select if the map is not used.
7. Click Submit.

Note: To add users to a map, right-click, and then select Add to Users.
To add departments to a map, right-click, and then select Add to Departments.
To copy a GIS map record, right-click, and then select Copy Map.

Defining parameters for GIS maps

Specify information about the map displayed inside Infor EAM including image/map service, geocoding service, and geoprocessing service. Use this page to customize how each map will look and behave using the GIS installation parameter values.

To define parameters for GIS maps:

1. Open the Maps form.
2. Select the GIS map for which to define parameters, and then click the Parameters tab.
3. Select the installation parameter, and then enter Value.
4. Click Submit.
Associating departments to GIS maps

Grant departmental privileges for specific maps. Associations made on this popup will create map records on the Maps page of the Departments form.

**Note:** This popup is accessible only when GISMAPS installation parameter is set to Department, and DEPTSEC installation parameter is set to On.

To associate a department to a GIS map:

1. Open the **Maps** form.
2. Select the map for which to associate departments, and then click the **Record View** tab.
3. Right-click, and then select **Add to Departments**.
4. Select—Select the department for which to associate to the map.
5. Click **Submit**.

Associating users to GIS maps

Grant users privileges to specific maps.

Associate maps based on the user's organization or department list.

Associations made on this popup will create map records on the **Maps** page of the **User Setup** form.

**Note:** This popup is accessible only when GISMAPS installation parameter is set to **Organization**.

To associate users to maps:

1. Open the **Maps** form.
2. Select the map for which to associate users, and then click the **Record View** tab.
3. Right-click, and then select **Add to Users**.
4. Select—Select the user for which to associate to the map.
5. Click **Submit**.

Copying GIS maps

Copy GIS map header and detail information.

To copy GIS maps:

1. Open the **Maps** form.
2. Select the map for which to copy, and then click the **Record View** tab.
3. Right-click, and then select **Copy Map**.
4. **Map**—Enter a unique code identifying the new map, and then enter the new map description in the adjacent field.
5 **Organization**—Enter the organization of the new map.
6 **Parameters**—Select to copy the GIS map parameters to the new map.
7 **Comments**—Select to copy the comments to the new map.
8 **Documents**—Select to copy the documents to the new map.
9 Click **Submit**.
The fleet management module allows you to manage fleet motor pools and the fleet billing process. Use the fleet management module to create vehicle tickets and view and modify fleet bills.

For more information on the American Trucking Association’s Vehicle Maintenance Reporting System (VMRS) and defining VMRS in the system, see "Defining VMRS codes" on page 380.

To access Databridge functions within Infor EAM, you must first set up Databridge menus for user groups. See "Setting up menus for user groups" in the System Administrator’s Guide.

Understanding fleet management terms

The following terms will help you become familiar with the fleet management module’s unique attributes:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle</td>
<td>A specific type of asset used in the fleet management module</td>
</tr>
<tr>
<td></td>
<td>Example: To classify a van in a fleet as a vehicle in the system, select Vehicle on the Assets form.</td>
</tr>
<tr>
<td>Motor Pool</td>
<td>The motor pool is a grouping of vehicles that are either rented to employees on a short-term basis (pool/loaner vehicles) or are provided as a permanent means of transportation for employees (assignment vehicles).</td>
</tr>
<tr>
<td></td>
<td>Example: The fleet management module will manage the entire motor pool for a company, organization, etc.</td>
</tr>
<tr>
<td>Vehicle Ticket</td>
<td>Tracks the issuing and returning of fleet vehicles from the motor pool</td>
</tr>
<tr>
<td></td>
<td>Example: Create a vehicle ticket to track a specific vehicle. The ticket tracks when the vehicle is is-</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>sued to and returned by employees, as well as other attributes of the vehicles such as mileage, parking location, and fuel levels.</td>
</tr>
<tr>
<td>Ticket Status</td>
<td>The status of a vehicle ticket changes as the ticket moves through its life cycle. This list describes the status codes.</td>
</tr>
<tr>
<td>Issued</td>
<td>Indicates that the vehicle is currently issued to an employee, and it is no longer an available asset in the motor pool.</td>
</tr>
<tr>
<td>Returned</td>
<td>Indicates that the vehicle has been returned from the employee and is back in the motor pool.</td>
</tr>
<tr>
<td>Completed</td>
<td>Indicates that the ticket is complete and ready to be billed. The ticket is now available for issuing.</td>
</tr>
<tr>
<td>Vehicle Type</td>
<td>Three types of vehicles make up the motor pool. This list describes the vehicle types.</td>
</tr>
<tr>
<td>Pool</td>
<td>Type of vehicle that is a temporary means of transportation for employees. If an employee needs a car from the pool for the day for a specific task, a pool vehicle is issued from the motor pool.</td>
</tr>
<tr>
<td>Loaner</td>
<td>Type of vehicle that is a temporary means of transportation for employees, particularly when their assignment vehicles are not available. When an employee's company vehicle needs repairs, a loaner vehicle is issued from the motor pool until the assignment vehicle is repaired.</td>
</tr>
<tr>
<td>Assignment</td>
<td>Type of vehicle that is assigned to employees on a long-term basis. Assignment vehicles are often company vehicles that are issued to employees for weeks, months, or years at a time.</td>
</tr>
<tr>
<td>Exception</td>
<td>Attaches additional fees to vehicle tickets for exceptional conditions that occur to vehicles. Exception codes are associated with vehicle tickets on the Exceptions page of the Vehicle Ticket form. Example: Associate an exception code that charges customers an additional fee for low amounts of fuel in returned vehicles with the vehicle ticket.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Adjustment</td>
<td>Adds credits and debits to previous bills. Adjustments are reflected on the subsequent fleet bill. To correct a ticket that was billed to an incorrect cost code, enter a <strong>New Cost Code</strong>. Adjustments can be added to pool, loaner, and assignment vehicles. Example: If a fleet customer was overcharged for mileage during the previous billing period, then provide a credit that will reimburse the fleet customer on the next fleet bill.</td>
</tr>
<tr>
<td>Bill</td>
<td>Fleet bills are generated by the billing process and correspond with each specific billing schedule. The frequency at which bills are generated is determined by the billing period (billing schedule). Fleet customers can also view fleets bills. Example: View a bill for a specific customer for a specific billing period.</td>
</tr>
<tr>
<td>Period</td>
<td>Billing schedules that determine billing process. At the end of the billing schedule, generate customer bills that correspond with the billing schedule <strong>Period End Date</strong>. Example: Choose to be billed weekly, monthly, quarterly, etc.</td>
</tr>
<tr>
<td>Billing Code</td>
<td>Determines the normal fees that customers are billed for various fleet billing categories. Together, billing codes and markup codes, when associated with specific fleet customers, determine the total rates for fleet billing categories. Example: Create a billing code for usage charges, and then associate a rate with that billing code. Fleet customers are typically billed that amount for usage charges.</td>
</tr>
<tr>
<td>Markup Code</td>
<td>Used to charges additional fees above and beyond the normal fees (billing codes). Together, billing codes and markup codes, when associated with specific fleet customers, determine the total rates for fleet billing categories. Example: Create a markup code for usage charges, and then associate a rate with that markup code. When markup fees are required,</td>
</tr>
</tbody>
</table>
Understanding motor pool management

Track vehicles with the motor pool management functionality of the fleet management module. First, create fleet customers, cost codes, and vehicles. Then, track the issuing and returning of vehicles from the motor pool, using vehicle tickets. You can also associate billing exceptions for vehicle tickets to add additional charges to the ticket and view billing adjustments for credits or debits to the bill. Finally, you can view and modify fleet bills, view fleet bill transaction and fleet bill adjustment transactions, and create pool, loaner, and assignment adjustments for credits and debits to the bill.

Understanding the fleet billing process

Through the fleet management system, fleet customers are billed for their use of pool, loaner, and assignment vehicles. Fleet customers are also billed for other motor pool vehicle costs such as maintenance labor and parts, non-maintenance related activities, fuel, insurance, and vehicle ticket exceptions.

The fleet billing process is the means by which the fleet management module generates bills for fleet customers. The process occurs automatically and is determined by the Process Start Date and Process Start Time on the Billing Schedules page of the Fleet Configuration form. Fleet billing periods are determined by the Period End Date for each billing schedule on the Billing Schedules page of the Fleet Configuration form, and fleet bills are generated according to this date. See Setting Up Billing Schedules for Fleet Configuration in Chapter 7 Fleet Management Configuration of the System Administrator’s Guide.

If for some reason the bills are not generated automatically, you can start the billing process manually by clicking Run Billing Process on the Parameters page of the Fleet Configuration form. See Creating Parameters for Fleet Configuration Chapter 7 Fleet Management Configuration of the System Administrator’s Guide.
If periods associated with Period End Dates that are before the most recent Period End Date remain unbilled when you manually initiate the billing process, the system generates bills for the earliest unbilled period, and then generates bills for the next earliest unbilled period until all unbilled periods (which are past due) have been processed.

You can also choose to view the current charges for a fleet customer by clicking Current Charges on the Billing History page of the Fleet Customers form. The system will calculate and display all charges up to the current system date. Viewing the current charges provides an idea of the amount of charges for the period to date. See Viewing Billing Histories for Fleet Customers Chapter 7 Fleet Management Configuration of the System Administrator’s Guide.

Finally, you can regenerate the last bill for a specific fleet customer by clicking Regenerate Bill on the Fleet Bills form. The system displays the fleet bills associated with the last fleet billing period. Use the regeneration process to correct a billing mistake and regenerate the bill instead of entering a billing adjustment. The changes are reflected on the subsequent bill. See "Modifying fleet bills" on page 750.

Creating vehicle tickets

Create vehicle tickets that will track the issuing and returning of fleet vehicles from the motor pool. The motor pool is a grouping of vehicles that are either rented to employees on a short term basis (pool/loaner vehicles) or are provided as a long-term means of transportation (assignment vehicles).

Note: You must have specific vehicle ticket authorizations to insert, update, and delete vehicle ticket records.

To create vehicle tickets:

1 Open the Fleet Vehicle Tickets form.
2 Click New Record. The system automatically populates Date Created and Created By.
3 Ticket Type—Choose one of the following options:
   • Pool—Select to indicate that the vehicle is a pool vehicle.
   • Loaner—Select to indicate that the vehicle is a loaner vehicle.
   • Assignment—Select to indicate that the vehicle is an assignment vehicle.
4 Ticket Status—Choose one of the following options:
   • Issued—Select to indicate that the vehicle will be issued.
   • Returned—Select to indicate that the vehicle has been returned.
   • Completed—Select to indicate that the ticket is complete and ready to be billed.
5 Vehicle—Enter the vehicle to associate with the vehicle ticket. The system automatically populates the vehicle description, Vehicle Org., Shop, Vehicle Status, Issued Fuel Level, Issued Parking Location, and Issued Mileage.
6 Received Vehicle—Enter the received vehicle to associate with the vehicle ticket. The system automatically populates the received vehicle description, Received Vehicle Org., and Received Vehicle Status.
Note: You can only specify a Received Vehicle for loan tickets.

7 Issued To—Enter the employee to which to issue the vehicle. The system automatically populates Cost Code, Fleet Customer, Fleet Customer Org., License No., and Phone No.
8 Cost Code—Enter the cost code with which to associate the vehicle ticket.
9 License No.—Enter the employee’s driver’s license number.
10 Other—Enter the visiting employee to which to issue the vehicle.
   Note: You must enter an employee in Issued To and/or Other.
11 Phone No.—Enter the employee’s phone number.
12 Fleet Customer—Enter the fleet customer with which to associate the vehicle ticket. The system automatically populates Fleet Customer Org.
13 Ticket Class—Enter the class of the ticket.
14 Issued Fuel Level—Enter the amount of fuel in the vehicle at the time it is issued. The system retrieves the amount from the last ticket, if available.
15 Issued Parking Location—Enter the location of the vehicle at the time it is issued. The system retrieves the location from the last ticket, if available.
16 Issued Mileage—Enter the mileage of the vehicle at the time it is issued. The system retrieves the mileage from the greater of the last ticket or meter reading.
17 Issued Date/Time—Enter the date and time that the vehicle is issued.
   Note: Issued Date/Time cannot be after the system date/time or the Returned Date/Time.
18 Est. Return Date/Time—Enter the estimated date and time that the vehicle is expected to be returned.
   Use the following fields for returning previously issued vehicles:
19 Returned Fuel Level—Enter the amount of fuel in the vehicle at the time it is returned.
20 Returned Parking Location—Enter the location of the vehicle at the time it is returned.
21 Returned Mileage—Enter the mileage of the vehicle at the time it is returned.
22 Returned Date/Time—Enter the date and time that the vehicle is returned. The system automatically populates Hours Used and Mileage Used.
23 Hours—Enter the number of hours for which to bill the vehicle.
24 Mileage—Enter the number of miles for which to bill the vehicle.
25 Click Save Record. The system automatically populates Ticket, Issued Date/Time, and Issued By. The system also automatically populates the Billing Code and Markup Code associated with the Vehicle, Class, Category, Type, and the Fleet Customer.
   Note: If exceptions have been associated with the vehicle ticket, Exceptions is selected.
   Upon saving a vehicle ticket with a status of Returned, the system automatically populates Returned To, Hours Cost and the currency, Mileage Cost and the currency, Exceptions Cost and the currency, Total Cost and the currency, and Period End Date.
   Upon saving a vehicle ticket with a status of Completed, the system automatically populates Completed Date/Time.
   Click Assignment Billing to view billing details for each period in which the assignment ticket has been billed.
Associating billing exceptions with vehicle tickets

Associate billing exceptions with vehicle tickets. For example, associate an exception code that charges customers an additional fee for low amounts of fuel in returned vehicles with the vehicle ticket.

**Note:** You cannot associate billing exceptions with completed vehicle tickets.

To associate billing exceptions with vehicle tickets:

1. Open the **Fleet Vehicle Tickets** form.
2. Select the vehicle ticket for which to associate billing exceptions, and then click the **Exceptions** tab.
3. Click **Add Exception**.
4. **Exception**—Enter the exception with which to associate the vehicle ticket. The system automatically populates the exception description, **Exception Org.**, and **Amount**.
5. **Date**—Enter the current date.
6. **Exception Type**—Select the type of exception.
7. **Extra Charge**—Select to include this exception in the vehicle ticket billing costs.
8. **Amount**—Enter the amount of the additional fee for the exception.
9. **Exception Comments**—Enter any additional comments.
10. Click **Submit**.

**Note:** Click **Create WO** to create a new work order for the vehicle ticket exception combination. The system populates Work Order with the new work order number. If a standard work order is associated with the exception, the standard work order can be used to create the work order. See "Creating work orders" on page 109.

Viewing billing adjustments for vehicle tickets

To view billing adjustments for vehicle tickets:

**Note:** The system checks the vehicle **Ticket Type** on the vehicle ticket header and displays billing adjustments based on the **Ticket Type**. Assignment adjustments are displayed differently than pool and loaner adjustments.

1. Open the **Fleet Vehicle Tickets** form.
2. Select the vehicle ticket for which to view billing adjustments, and then click the **Billing Adjustments** tab.
3. View the billing adjustments for the vehicle ticket.
Viewing fleet bills

View fleet bills that are generated by the billing process.

To view fleet bills:

1. Open the **Fleet Bills** form.
2. View the fleet bill information.

Modifying fleet bills

Modify fleet bills that are generated by the system.

**Note:** You cannot delete fleet bills.

To modify fleet bills:

1. Open the **Fleet Bills** form.
2. Select the fleet bill to modify, and then click the **Record View** tab. The system automatically populates **Fleet Bill**, the fleet bill description, **Fleet Customer**, **Fleet Customer Org.**, **Period End Date**, **Total**, **Billed Date**, and **General Ledger**.
3. **Class**—Enter the class to which the fleet bill belongs. The system automatically populates **Class Org.**
4. **Paid Date**—Enter the date that the fleet bill was paid.
5. Click **Save Record**.

**Note:** Click **Regenerate Bill** to regenerate the bill. The system generates and displays a new fleet bill number and deletes the original bill from the system. The new bill will include all transactions that were originally billed as well as any new transactions that are within the billing period that are not billed. **Billed Date** is populated with the current system date.

You cannot regenerate the bill if the bill you want to regenerate is not the latest bill or if the bill has been sent to a general ledger.

If the bill is regenerated, the system deletes the old bill.

Viewing billing details for fleet bills

View billing details for specific fleet bills. 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.
**Note:** When filtering the billing details, **Subtotals** and **Totals** may change; 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 details for fleet bills:

1. Open the **Fleet Bills** form.
2. Select the fleet bill for which to view billing details, and then click the **Billing Details** tab.
3. View the billing details.

**Viewing fleet bill transactions**

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 total for the selected bill line. This includes usage charges and usage markup charges.

To view fleet bill transactions:

1. Open the **Fleet Bills** form.
2. Select the fleet bill for which to view fleet bill transactions, and then click the **Billing Details** tab.
3. Select the fleet bill line for which to view fleet bill transactions.
   
   **Note:** You must select a bill line to view fleet bill transactions.

4. **Category**—Choose one of the following options:
   - **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**

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 always displays all adjustments related to the bill and category.
To view fleet bill adjustment transactions:

1. Open the **Fleet Bills** form.
2. Select the fleet bill for which to view fleet bill adjustment transactions, and then click the **Billing Details** tab.
3. **Category**—Choose one of the following options:
   - **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.
4. Click **View Adjustment Transactions**.
5. View the charges for the specific adjustment transaction category.

### Creating pool and loaner adjustments for fleet bills

Create an adjustment to vehicle ticket charges that have already been billed. The adjustments will be reflected on the subsequent fleet bill. You can make changes to billing category amounts or cost codes.

To enter specific pool or loaner adjustments for hours charges, hours markup charges, mileage charges, mileage markup charges, and/or exceptions charges, specify the pool or loaner adjustment amount in the corresponding field. These assignment adjustment amounts can be negative (a credit) or positive (a debit).

**Note:** You can only make adjustments to pool and loaner vehicle tickets on this form.

You cannot update a pool or loaner adjustment after the adjustment is billed.

To create pool and loaner adjustments for fleet bills:

1. Open the **Fleet Bills** form.
2. Select the fleet bill for which to create a pool or loaner adjustment, and then click the **Pool/Loaner Adjustments** tab. The system automatically populates **CreatedBy** and all currency fields in the **Adjustment Details** section.
3. Click **Add Adjustment**.
4. **Ticket**—Enter the vehicle ticket for which to add a pool/loaner adjustment. The system automatically populates **Vehicle**, the vehicle description, **Issued Date/Time**, **Created Date/Time**, **Period End Date**, **Returned Date/Time**, **Cost Code**, **Hours Billed** and the currency, **Hours Markup Billed** and the currency, **Mileage Billed** and the currency, **Mileage Markup Billed** and the currency, and **Exceptions Billed** and the currency.
5 New Cost Code—Enter a new cost code to correct a ticket that was billed to an incorrect cost code.

**Note:** You cannot adjust cost code values and pool or loaner adjustment amounts on the same fleet bill. If you enter a New Cost Code, the system protects all other fields except Ticket and Comments. If you clear the New Cost Code, the system re-enables all of the protected fields. If you enter pool and loaner adjustment amounts, the system protects New Cost Code. If you clear the pool or loaner adjustment amounts, the system re-enables New Cost Code.

6 Hours Adjustment—Enter the adjustment amount for hours charges.

7 Hours Markup Adjustment—Enter the adjustment amount for hours markups.

8 Mileage Adjustment—Enter the adjustment amount for mileage charges.

9 Mileage Markup Adjustment—Enter the adjustment amount for mileage markup charges.

10 Fuel Markup Adjustment—Enter the adjustment amount for fuel markup charges.

11 Exceptions Adjustment—Enter the adjustment amount for exceptions charges.

12 Exception—Enter the exception for which to add pool or loaner adjustment. The system automatically populates Exceptions Adjustment.

13 Comments—Enter any comments about the pool or loaner adjustment.

14 Click Submit.

**Note:** You cannot delete a pool or loaner adjustment after the adjustment is billed.

Creating assignment adjustments for fleet bills

Create an adjustment to vehicle ticket charges that have already been billed. The adjustments will be reflected on the subsequent fleet bill. To correct a ticket that was billed to an incorrect cost code, enter a New Cost Code. To enter specific assignment adjustments for period charges, period markup charges, mileage charges, mileage markup charges, fuel markup charges, insurance charges, insurance markup charges, and/or exceptions charges, specify the assignment adjustment amount in the corresponding field. These assignment adjustments amounts can be negative (a credit) or positive (a debit).

**Note:** You can only make adjustments to assignment vehicle tickets on this screen. You cannot update an assignment adjustment after the adjustment is billed.

To create assignment adjustments for fleet bills:

1 Open the Fleet Bills form.

2 Select the fleet bill for which to create an assignment adjustment, and then click the Assignment Adjustments tab. The system automatically populates Created By and all currency fields in the Adjustment Details section.

3 Click Add Adjustment.

4 Ticket—Enter the vehicle ticket for which to add an assignment adjustment. The system automatically populates Vehicle, the vehicle description, Issued Date/Time, Created Date/Time, Period End Date, Returned Date/Time, Cost Code, Period Charge Billed and the currency, Period Markup Billed and the currency, Mileage Billed and the currency, Mileage Markup Billed and the currency,

5 New Cost Code—Enter a new cost code to correct a ticket that was billed to an incorrect cost code.

Note: You cannot adjust cost code values and assignment adjustment amounts on the same fleet bill. If you enter a New Cost Code, the system protects all other fields except Ticket and Comments. If you clear the New Cost Code, the system re-enables all of the protected fields. If you enter assignment adjustment amounts, the system protects New Cost Code. If you clear the assignment adjustment amounts, the system re-enables New Cost Code.

6 Period Charge Adjustment—Enter the adjustment amount for period charges.

7 Period Markup Adjustment—Enter the adjustment amount for period markups.

8 Mileage Adjustment—Enter the adjustment amount for mileage charges.

9 Mileage Markup Adjustment—Enter the adjustment amount for mileage markup charges.

10 Fuel Markup Adjustment—Enter the adjustment amount for fuel markup charges.

11 Insurance Adjustment—Enter the adjustment amount for insurance charges.

12 Insurance Markup Adjustment—Enter the adjustment amount for insurance markup charges.

13 Exceptions Adjustment—Enter the adjustment amount for exceptions charges.

14 Exception—Enter the exception for which to add an assignment adjustment. The system automatically populates Exceptions Adjustment.

15 Comments—Enter any comments about the assignment adjustment.

16 Click Submit.

Note: You cannot delete an assignment adjustment after the adjustment is billed.
Infor EAM Microsoft Project interface

The Infor EAM Microsoft (MS) Project Interface facilitates work order scheduling and resource assignment by allowing you to schedule work and resources in MS Project and then update the Infor EAM database with the information.

See the MS Project documentation for information on standard MS Project functionality.

Installing the Infor EAM MS Project interface

**Note:** You must install Infor EAM and MS Project 2003 or MS Project 2010 before you install the Infor EAM MS Project Interface. See the *Infor EAM Installation Guide* and the MS Project 2003, 2010 documentation for more information.

You must also install the MS .NET Framework Version 1.1 before you install the Infor EAM MS Project Interface. The MS .NET Framework is included on the Infor EAM MS Project Interface CD, and is called DOTNETFX.EXE. You must run DOTNETFX.EXE before SETUP.EXE if the MS .NET Framework is not already installed on the machine.

To install the Infor EAM MS Project Interface:

1. Insert the Infor EAM MS Project Interface CD into the proper drive.
2. Choose the folder specific to your version of MS Project:
   - *MS Project 2003-2007*—Select this folder if you have MS Project 2003 or 2007 installed on your machine.
   - *MS Project 2010*—Select this folder if you have MS Project 2010 installed on your machine.
3. Execute the SETUP.EXE file. The system displays the Language Installation dialog box.
   **Note:** If you would like to use English as the language for the installation, execute the msproject.msi file. The installation wizard will skip the language selection option in step #4 and display the Welcome dialog box.
4. Select the language to be used in the installation, and then click **OK**.
5. Click **Next**.
6. Click **I accept the terms in the License Agreement**, and then click **Next**.
7. **Folder**—Enter the folder in which to install the Infor EAM MS Project Interface.
8 Click Next.
9 Click Install.
10 Wait for the system to complete the installation, and then click Finish.
11 Click Close.

Choosing a Language for the Infor EAM MS Project Interface

After the installing the Infor EAM MS Project, choose a language for the interface.
To choose a language for the Infor EAM MS Project Interface:
1 Select Infor > Infor EAM MS Project Interface > Choose Language.
2 Select the language to be used in the Infor EAM MS Project Interface, and then click OK.

Setting up connection information

Before completing tasks within the system, you must first set up the appropriate connection information. Use this information each time you log in to the system.

Note: The connection information is also used to establish privileges to Infor EAM records within the system. Therefore, you can only create and maintain one user record per client machine.

To set up connection information:
1 Open MS Project.
2 Choose Infor > Infor EAM.
3 Click Set connection information.
4 Host Name—Enter the URL for the Infor EAM server.
5 Username—Enter the user code used to log in to Infor EAM. If necessary, include the tenant after the user code, e.g., user@tenant.
6 Password—Enter the password used to log in to Infor EAM.
7 Click Save.
   Note: Click Test to test the connection information.
Associating Infor EAM priority codes with MS Project priority codes

After defining work priority codes in Infor EAM, associate those codes with the priority codes in MS Project.

To associate Infor EAM priority codes with MS Project priority codes:

1. Open the **MS Project Priority Mappings** form.
2. Click **Add Mapping**.
3. **Infor EAM Priority**—Select the Infor EAM work priority code to associate with an MS Project priority code.
4. **MS Project Priority**—Enter the MS Project priority code to associate with the Infor EAM priority code.
5. Click **Submit**.

Creating scheduling sessions in Infor EAM

Create batches of work orders to import into MS Project by creating scheduling sessions in Infor EAM. You can also send resource information to MS Project with the scheduling session.

**Note:** To return to a previous side-pane while creating a new scheduling session, click the appropriate **Go back to** button.

To create scheduling sessions in Infor EAM:

1. Open MS Project.
2. Choose **Infor > Infor EAM**.
3. Set the connection information for the Infor EAM MS Project Interface. See "Setting up connection information" on page 756.
4. Click **Create new scheduling session**.
5. **Description**—Enter a description of the session.
6. **Organization**—Select the organization with which to associate the session if you use multi-organization security.
7. **Include Header Task**—Select to display both the work order header tasks and work order activity sub-tasks.
8. **Set Task Duration To Est. Hours**—Select to populate **Duration** of the activity task to the estimated hours of the Infor EAM work order activity.
9. Click **Save and go to Step 2**.
10. **From**—Enter the beginning date of the work order activity start dates included in the session.
11. **To**—Enter the ending date of the work order activity start dates included in this session.
12. Click **Save and go to Step 3**.
13. Choose one or more of the following criteria for filtering work orders to include in the session:
- Project—Click **Project**, and then select the projects to include in the list of work orders.
- Department—Click **Department**, and then select the departments to include in the list of work orders.
- WO Type—Click **WO Type**, and then select the work order types to include in the list of work orders.
- WO Status—Click **WO Status**, and then select the work order statuses to include in the list of work orders.
- Priority—Click **Priority**, and then select the priorities to include in the list of work orders.
- Trade—Click **Trade**, and then select the trades to include in the list of work orders.
- Equipment—Click **Equipment**, and then enter the first letter(s) in the spelling of the pieces of equipment to include in the list of work orders. Click **Refresh**. Select the pieces of equipment to include in the list of work orders.
- Equipment Class—Click **Equipment Class**, and then select the equipment classes to include in the list of work orders. The system displays the selected criteria in the preview-pane.
- Assigned By—Click **Assigned By**, and then select the supervisors to include in the list of work orders.

14 Click **Display Results**. The system displays a list of unlocked work order activities that matches the activity start date range and the criteria you selected. Select the work order activities to include in the new scheduling session.

**Note:** Check **Select** to select all of the work order activities.

You cannot select work order activities that are associated with existing open sessions.

You cannot select work order activities with Estimated Hours equal to 0.

15 Click **Save and go to Step 4**.

16 Choose one or more of the following criteria for filtering employees to include in the session:
- Department—Click **Department**, and then select the departments to include in the list of employees.
- Trade—Click **Trade**, and then select the trades to include in the list of employees.
- Class—Click **Class**, and then select the classes to include in the list of employees. The system displays the selected criteria in the preview-pane.

17 Click **Display Results**. The system displays a list of employees that matches the criteria you selected. Select the employees to include in the new scheduling session.

**Note:** Check **Select** to select all of the employees.

18 Click **Save and go to Step 5**.

19 Choose one or more of the following criteria for filtering suppliers to include in the session:
- Class—Click **Class**, and then select the classes to include in the list of suppliers.

20 Click **Display Results**. The system displays a list of suppliers that matches the criteria you selected. Select the suppliers to include in the new scheduling session.

**Note:** Check **Select** to select all of the suppliers.

21 Click **Save and go to Step 6**.
22 Choose one or more of the following criteria for filtering maintenance equipment to include in the session:
   • Department—Click Department, and then select the departments to include in the list of maintenance equipment.
   • Class—Click Class, and then select the classes to include in the list of maintenance equipment.
   • Category—Click Category, and then select the categories to include in the list of maintenance equipment.

23 Click Display Results. The system displays a list of maintenance equipment that matches the criteria you selected. Select the maintenance equipment to include in the new scheduling session.
   
   **Note:** Check Select to select all of the maintenance equipment.

24 Click Save and go to Step 7.

25 Click Class to select the classes to include in the list of tools.

26 Click Display Results. The system displays a list of tools that matches the criteria you selected. Select the tools to include in the new scheduling session.
   
   **Note:** Check Select to select all of the tools.

27 Click Save and Finish.

**Note:** When saving the record, the system also imports the work order activity and resource (employee, supplier, maintenance equipment, and tool) records for the session into MS Project.

---

**Importing sessions into MS Project from Infor EAM**

Import an existing scheduling session into MS Project from Infor EAM.

To import sessions into MS Project from Infor EAM:

1. Open MS Project.
2. Choose Infor > Infor EAM.
3. Set the connection information for the Infor EAM MS Project Interface. See “Setting up connection information” on page 756.
4. Click Import existing scheduling session.
   
   **Note:** To import data from Infor EAM, the current project in MS Project must be empty.

5. **Scheduling Session**—Select the scheduling session to import to MS Project.
   
   **Note:** You can only import scheduling sessions with a status of Exported or Ready to Export.

6. Click Import.
Creating and adding work orders and activities to scheduling sessions

Create a work order or a work order activity and then add it to an existing scheduling session.

Creating a work order and adding it to an existing scheduling session

To create a work order and add it to an existing scheduling session:

1. Open the MS Project file that contains the open scheduling session for which to add a work order.
   
   **Note:** You must first create or import a scheduling session in order to add a work order.

2. Click **Create work order**.

3. **Equipment**—Enter the equipment on which to perform work. The system automatically populates **Equipment Description** and **WO Org**.

4. **WO Description**—Enter a description of the work needed.

5. **Status**—Enter the status of the work order.

6. **Type**—Enter the type for the work order.

7. **Priority**—Enter the priority of the work order.

8. **Standard WO**—Enter the standard work order.
   
   **Note:** If you enter a **Standard WO**, the system creates the new work order, any activities, any child work orders, and related activities. Only standard work orders and child work orders with activities are added to the current scheduling session.

9. **Parent WO**—Enter the code identifying the parent work order.

10. **Class**—Enter the class of the work order.

11. **Department**—Enter the department.

12. **Location**—Enter the location of the work to be completed.

13. **Problem Code**—Enter the code to identify the problem.

14. **Cost Code**—Enter the cost code of the work order.

15. **Sched. Start Date**—Enter the starting date for the work order.

16. **Sched. End Date**—Enter the ending date for the work order.

17. **Assigned To**—Enter the person responsible for the work order.

18. **Reported By**—Enter the employee requesting the work.

19. **Assigned By**—Enter the supervisor who assigned the work order.

20. **Project-Budget**—Enter the project budget for the work order.

21. **Trade**—Enter the trade required to perform the activity.

22. **Task**—Enter the task code for the activity.

23. **Material List**—Enter the material list code for the material list containing the parts needed for the work order.
24 **Activity Start Date**—Enter the beginning date for the activity.
25 **Activity End Date**—Enter the ending date for the activity.
26 **Estimated Hours**—Enter the number of estimated hours for the activity.
27 **People Required**—Enter the number of people required to perform the activity.
28 Click **Submit**.

   **Note:** Click **Reset** to clear the form.
   Click **Custom Fields** to display all custom fields associated with the work order.
   Click **Comments** to add or edit comments for the work order or work order activity.

   **Priority**—Enter a priority for the work order. The system converts the Infor EAM Priority to the appropriate MS Project Priority before creating the scheduling session.

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**Creating a work order activity and adding it to an existing scheduling session**

To create a work order activity and add it to an existing scheduling session:

1 Open the MS Project file that contains the open scheduling session for which to add a work order activity.

   **Note:** You must first create or import a scheduling session in order to add a work order activity.

2 Select the work order for which to add an activity, and then click **Create work order activity**. The system automatically populates **Work Order**, **Work Order Description**, and **WO Org**.

3 **Activity**—Enter an activity.

4 **Trade**—Enter the trade required to perform the activity.

5 **Task**—Enter the task code for the activity.

6 **Material List**—Enter the material list code for the material list containing the parts needed for the work order.

7 **Activity Start Date**—Enter the starting date for the activity.

8 **Activity End Date**—Enter the ending date for the activity.

9 **Estimated Hours**—Enter the number of estimated hours for the activity.

10 **People Required**—Enter the number of people required to perform the activity.

11 Click **Submit**.

   **Note:** Click **Reset** to clear the form.
   Click **Comments** to add or edit comments.
Importing work orders into open MS Project scheduling sessions from Infor EAM

Import an existing work order into an open MS Project scheduling session from Infor EAM.

To import existing work orders into an open MS Project scheduling session from Infor EAM:

1. Open MS Project.
2. Choose Infor > Infor EAM.
3. Set the connection information for the Infor EAM MS Project Interface. See "Setting up connection information" on page 756.
4. Click Import Existing Work Order.
5. Work Order—Select the work order to import into MS Project. The system automatically populates the work order details.
   
   **Note:** Work Orders must have at least one activity to be imported.
   
   An open scheduling session must exist to import existing work orders. If no open scheduling session exists for the project file, create or import a scheduling session prior to importing existing work orders.

6. Click Import.

Exporting sessions from MS Project to Infor EAM

Export scheduling sessions from MS Project after scheduling work or modifying schedules.

To export sessions from MS Project to Infor EAM:

1. Open the MS Project file that contains the open scheduling session that you want to export to Infor EAM.
   
   **Note:** You must first create or import a scheduling session in order to export a scheduling session.

2. Click Export scheduling session.
3. Click Export Session.

   **Note:** Infor EAM updates the resources assigned, Activity Start Date, Activity End Date, Estimated Hours, and Percent Complete, and sets Assigned By of the work order equal to Assigned By in MS Project.

   Click Cancel to close the Export Scheduling Session side-pane without exporting any records to Infor EAM.

   Work order activities deleted in MS Project are not deleted in Infor EAM, and new work order activities created in MS Project will not be exported back to Infor EAM.
Canceling sessions

Cancel an existing scheduling session.

**Note:** Canceling the session will not delete the work order activities and resource (employee, supplier, maintenance equipment, and tool) records from the current project, but after canceling the session, you cannot export the updated tasks back to Infor EAM.

To cancel sessions:

1. Open the MS Project file that contains the open scheduling session that you want to cancel.
   
   **Note:** You must first create or import a scheduling session in order to cancel a scheduling session.

2. Click **Cancel scheduling session**.

3. Click **Cancel Session**.
The asset management services module is used by maintenance organizations that operate as a business unit and charge the cost of maintenance work to the customers for whom the work is performed. Work charged to one customer may be carried out at different places.

Time, material, and labor costs are defined in pricing schedules and then applied to customer contracts, which specify how maintenance work is charged to the customer. The contracts are then used to calculate work order costs and to generate invoices and reports.

Creating customer contracts

Create contracts for commercial service customers to specify how time, material, and labor costs are charged to a customer for maintenance work.

Note: Customers are defined for use with service requests and asset management services. See "Creating customers" on page 484.

To create customer contracts:

1. Open the **AMS-Customer Contracts** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the customer contract belongs if you use multi-organization security.
4. **Customer Contract**—Enter a description of the customer contract in the adjacent field. After you save the record, a customer contract number will be assigned.
5. **Status**—Select the contract status. Changing the status of a customer contract may affect additional system checks and field changes as follows:
   - **Unfinished**—All fields are editable. However, when you save the customer contract with Unfinished status, **Organization** is protected.
   - **Approved**—All fields are protected except **Status** and **EndDate. Approved** status indicates that payments can be approved and work orders can be processed.
   - **Finished**—All fields are protected except **Status. Finished** status indicates that payments and work order charges can still be invoiced, but no new work order charges will be processed for a finished contract.
• **Cancelled**—All fields are editable except **Organization**. **Cancelled** status indicates that the customer contract has been cancelled and can only be selected if no invoiced payments or work order charges exist.

**Note:** You cannot modify the status of customer contracts if there are any existing approved or invoiced fixed charges, or if there are any existing calculated work orders. A calculated work order is a work order that is associated with a customer contract for which customer charges have been calculated. See "Understanding the calculation of customer charges" on page 771.

6 **Class**—Enter the class of the contract. The classes shown belong to the AGR entity.

7 **Customer**—Enter the customer to whom to charge the work.

8 **Pricing Schedule**—Enter the pricing schedule for time and material costing.

9 Choose one of the following options:
   • **Apply the contract to equipment**—Specify the **Equipment** for which to apply the contract. The contract also applies to any child equipment, unless the cost rollup attribute is set for the child equipment.
   • **Apply the contract to a project**—Specify the **Project** to which the contract applies. The contract also applies to any child projects.
   • **Apply the contract to an event**—Specify the **Work Order** to which the contract applies.

**Note:** MEC work orders are not displayed in the **Work Order** lookup.

10 **Start Date and End Date**—Enter the date on which the contract period begins and the expiration date of the contract. If you do not enter a date, there is no time limitation on the contract.

**Note:** If the contract has a fixed charge due date, the **Start Date** must be on or before the fixed charge due date, and the **End Date** must be on or after the fixed charge due date.

11 Click **Save Record**.

---

**Creating fixed charge schedules for customer contracts**

Create fixed charge schedules for customer contracts to create a set price to be added to a customer invoice based upon a specified due date.

**Note:** When generating costs for a customer contract, the system uses fixed charges in the place of any work order charges and creates the fixed charges via the customer invoice. See "Understanding the calculation of customer charges" on page 771. If a work order is created with a cost for a customer contract, the system bypasses the work order when calculating costs, and the cost for the customer will be the specified fixed charges.

To create fixed charge schedules for customer contracts:

1 Open the **AMS-Customer Contracts** form.

2 Select the customer contract for which to create fixed charges and then click the **Fixed Charges** tab. The system automatically populates and protects **Start Date** and **End Date** with the date(s) from the customer contract header. The system populates **Currency** with the currency of the **Organization** of the contract header.
3 Click **Add Fixed Charge**.

4 **Line**—Enter a description of the fixed charge in the adjacent field. Modify the sequence number of the fixed charge as necessary. The next incremental line number is automatically assigned based on the setting of the INCRLINO installation parameter.

**Note:** You can only edit the **Line** number when inserting a record. After the record is saved, **Line** is protected.

5 **Status**—Select the status of the fixed charge. Changing the status of a fixed charge may affect additional system checks and field changes as follows:

- **Unfinished**—All fields are editable. However, when you submit the fixed charge with **Unfinished** status, the system protects **Line**. Select **Unfinished** if the fixed charge or the customer contract is not approved.
- **Approved**—The system protects all fields except **Status**. Select **Approved** to create an invoice for this payment.
- **Cancelled**—The system protects all fields except **Status**. Select **Cancelled** to cancel the invoice for this payment.
- **Due Date**—Enter the date when records can be invoiced. Leave this field blank for the record to be invoiced every time invoices are generated.
- **Price**—Enter the gross price (not including tax) in internal currency units.

6 Click **Submit**.

---

**Creating pricing schedules**

Create pricing schedules to define time and material calculations, work orders, custom trade rates, and part-specific charges to be associated with customers and customer contracts.

To create pricing schedules:

1 Open the **AMS-Pricing Schedules** form.

2 Click **New Record**.

3 **Organization**—Enter the organization to which the pricing schedule belongs if you use multi-organization security.

4 **Pricing Schedule**—Enter a unique code identifying the pricing schedule and then enter a description of the pricing schedule in the adjacent field.

5 **Class**—Enter the class of the pricing schedule. The classes shown belong to the ARR entity.

6 **Labor Cost %**—Enter the percentage of the work order labor costs that is charged to the customer.

7 **Stock Items %**—Enter the percentage of the work order costs for stock items that is charged to the customer.

8 **Hired Labor %**—Enter the percentage of the work order hired labor costs that is charged to the customer.

9 **Direct Outs %**—Enter the percentage of the work order direct material costs that is charged to the customer.
10 Tool Usage %—Enter the percentage of the work order tool usage costs that is charged to the customer.

11 Services % —Enter the percentage of the work order services costs that is charged to the customer.

12 Additional Charge—Enter an additional fee to associate with the pricing schedule, e.g., if you assess a standard trip charge regardless of the work performed, enter that amount.

   Note: Additional Charge is not displayed if the MULTIORG installation parameter is set to YES. If you are using multi-organization security, you must add additional charges for each organization on the Additional Charges page. See “Adding additional charges (MOS)” on page 769.

13 Time Rounding (min.)—Enter the number of minutes to round charged time of booked hours, e.g., a value of 15 indicates rounding to quarters of an hour.

14 Minimum Time (min.)—Enter the minimum number of minutes to charge per labor booking.

15 Custom Trade Rates—Select to apply a markup for specific trade rates.

   Note: If you enter Labor Cost %, you cannot select Custom Trade Rates.

16 Custom Part Charges—Select to apply part charges depending on the type of part used.

   Note: If you enter Stock Items %, you cannot select Custom Part Charges.

17 Click Save Record.

   Note: When you save the pricing schedule record, a record is also created on the Custom Trade Rates, Custom Part Charges, and WO Criteria pages based on the information entered for the pricing schedule.

Creating custom trade rates

Create custom trade rates for a pricing schedule. Custom trade rates are used to charge labor costs to customers based on rates defined for specific trades and hour types instead of a standard labor cost percentage entered on the Pricing Schedule header.

To create custom trade rates:

1 Open the AMS-Pricing Schedules form.
2 Select the pricing schedule for which to create custom trade rates and then click the Custom Trade Rates tab.
3 Click Add Rate.
4 Trade—Enter the trade for which to charge the custom trade rates to the customer.
5 Type of Hours—Enter the type of work hours to charge to the customer.
6 Hourly Rate—Enter the hourly rate to charge the customer.
7 Click Submit.
Creating custom part charges

Create custom prices for part charges for a pricing schedule. Custom part charges are used to charge material costs to customers based on rates defined for part classes instead of a standard stock item cost percentage entered on the Pricing Schedule header.

To create custom part charges:

1. Open the AMS-Pricing Schedules form.
2. Select the pricing schedule for which to create custom part charges and then click the Custom Part Charges tab.
3. Click Add Charge.
4. **Part Class**—Enter the part class for which to charge part prices to the customer.
5. **Charge %**—Enter the percentage of the part prices to charge to the customer.
   
   **Note:** To indicate that the exact cost is charged to the customer, enter 100. To create a surcharge for the part prices, enter a value greater than 100.

6. Click Submit.

Adding additional charges (MOS)

Add additional charges to a pricing schedule for specific organizations. Additional charges on a pricing schedule are added to every work order that is completed for a customer contract. The additional charges are not added or displayed on the work order when the work order is created. Instead, additional charges are added to the work order costs when the system calculates work order customer charges. See "Understanding the calculation of customer charges" on page 771.

**Note:** You can only add additional charges for specific organizations if the MULTIORG installation parameter is set to YES.

To add additional charges (MOS):

1. Open the AMS-Pricing Schedules form.
2. Select the pricing schedule for which to add additional charges and then click the Additional Charges tab.
3. Click Add Charge. The system automatically populates Organization with the organization of the logged-in user.
4. **Additional Charge**—Enter an additional amount to add to invoices for the pricing schedule.
   
   **Note:** A fixed charge is per invoice; whereas, an additional charge is per work order.

5. **Organization**—Enter the organization for which to add the fixed/added price.
6. Click Submit.
Defining work order criteria

Define criteria to identify the work orders for which to charge for pricing schedules. The system uses the specified work order criteria for a pricing schedule to select the work orders for which to charge a customer when calculating work order costs. See "Understanding the calculation of customer charges" on page 771.

After the system selects all of the existing work orders matching the work order criteria for a pricing schedule, it then calculates and compiles all the costs for the work orders, which will be used later during the assembly of charges for customer invoices. See "Understanding customer invoice generation" on page 775.

To define work order criteria for pricing schedules:

1. Open the AMS-Pricing Schedules form.
2. Select the pricing schedule for which to define work order criteria parameters and then click the WO Criteria tab.
   
   **Note:** When you create pricing schedules, the system automatically creates a WO Criteria record for the Department, WO Type, and Equipment Class using an asterisk (*) to represent all departments, work order types, and equipment classes. See "Creating pricing schedules" on page 767.

3. Click Add WO Criteria.
4. **Department**—Enter the department performing the work.
5. **WO Type**—Enter the work order type.
6. **Equipment Class**—Enter the equipment class on which the work will be performed.
7. Click Submit.

Viewing invoices for AMS-Customers

View a list of invoices for a selected customer.

**Note:** If you use multi-organization security, the system displays all invoices for a selected customer based on the query permissions established by the multi-organization security settings for the EVNT and INV entities.

To assemble/generate customer invoices, right-click on a form for which the customer invoice generation option is available, and then select Create Customer Invoice. See "Understanding customer invoice generation" on page 775.

To view invoices for customers:

1. Open the AMS-Customers form.
2. Select the customer for which to view invoices and then click the Invoices tab.
3. View the customer invoice information.
Viewing AMS-Customer contracts

View contracts associated with each customer.

**Note:** Customers are defined for use with service requests and asset management services. See "Creating customers" on page 484. See "Creating customer contracts" on page 765 for information on the creation of contracts for customers.

To view customer contracts:

1. Open the **AMS-Customers** form.
2. Select the customer for which to view contracts and then click the **Contracts** tab.
3. View the customer contract information.

Calculating and approving customer charges

The system calculates customer charges based on customer contracts, pricing schedules, and work orders associated with customer contracts.

Review customer charges and make corrections as necessary, and then approve and generate the customer charges to customer invoices.

Understanding the calculation of customer charges

The system calculates customer charges and locates the current work orders that are associated with a customer contract. View the customer charges on the **Approve Customer Charges** form.

The customer charge calculation process is initiated at different points within the system and includes work orders that match the following criteria:

- Work orders of event type JOB or PPM (or their user status equivalent)
- Work orders for which there is no Parent work order
- Work orders for which Continue Charging is not selected and are not associated with any customer charge records with a Status of Excluded from invoicing, Approved, or Invoiced
- Work order line types LAB, MAT, HIR, DMA, FIX, or TOOL

For all work orders that match the previously stated criteria, the system then calculates customer charges. See the following list for additional information:

- First, the system determines which work orders are associated with a customer contract. To do so, the system checks the work order first, then the project of the work order (and child projects), then the equipment of the work order (and child equipment), and finally the location of the work order (and child locations).
- After making the association between a work order and a customer contract, the system then creates a customer charge record for the work order on the **Approve Customer Charges** form.
Note: A work order must have some costs associated with it to generate a customer charge. If the system cannot find an approved contract that matches, the system generates an error message that can be viewed on the Comments page of the Approve Customer Charges form for the current work order charge record. Also, if there is an error message for the work order charge record, the Status of the record will always be changed to Data Error.

If there are multiple, valid customer contracts associated with a work order, the system generates charges for the customer contract for which the most specific data is defined.

If there is more than one valid customer contract, the system generates charges for the customer contract associated with a pricing schedule for which specific values are defined on the WO Criteria page of the Pricing Schedules form.

• Next, the system retrieves any additional charges for pricing schedules associated with the customer contract.

  Note: The system only adds the value of an additional charge to a work order once. It does not include any additional charges for which there are already existing charges on a work order, unless the value of the Additional Charge has been updated on the pricing schedule after a work order charge has been generated. If the Additional Charge has been updated, then the first work order charge record contains the original value of the Additional Charge, and the system generates a new work order charge for the difference between the values of the two additional charges.

• If Custom Trade Rates is selected for a pricing schedule associated with a customer contract, the system bypasses any trade rates and uses only the rates specified on the Custom Trade Rates page of the Pricing Schedules form.

• If Custom Part Charges is selected for a pricing schedule associated with a customer contract, the system calculates charges using the values specified for Charge % on the Custom Part Charges page of the Pricing Schedules form to calculate charges rather than the value specified for Stock Items Charge %.

• If there are existing labor hours on a work order, the system rounds the hours based on the values specified for Time Rounding (min) and Minimum Time (min) on the pricing schedule.

  Note: The system does not track which transactions belonging to a work order have already been billed. Therefore, if you re-generate work order charges for a customer contract, the system simply calculates the total work order charges again and subtracts the values that have already been approved or invoiced to calculate the necessary charges for the new work order charge record.

Approving and generating customer charges

Approve customer charges after reviewing and correcting the results of time and material calculations.

After approving the customer charges, generate invoices from all customer charges.

Caution: The system generates customer charges for all work orders, not just the work order selected on the List View page.

To approve and generate customer charges:
1 Open the **AMS-Approve Customer Charges** form.

2 Select the work order for which to approve customer charges and then click the **Record View** tab. The system automatically populates **Charge Number**, **Run Date**, **Customer**, **Originator**, and **Customer Contract**.

Note: **Charge Number** is used to associate several invoices with the same work order.

3 **Status**—Enter the status of the customer charges. See the following for a description of the possible customer charge statuses:

   - **Approved**—Work order charge will be invoiced. All fields are protected except **Status**.
   - **Data Error**—System generated status. Work order charge will not be invoiced. You can update **Status**, **Continue Charging**, and **Corrections** as necessary.
   - **Exclude from invoicing**—Work order charge will not be invoiced. You can update **Status**, **Continue Charging**, and **Corrections** as necessary.
   - **Invoiced**—System generated status indicating that the charges are invoiced. All fields are protected.
   - **Unapproved**—Default status of the calculations. You can update **Status**, **Continue Charging**, and **Corrections** as necessary.

Note: After you generate the invoice, the system automatically changes **Status** to Invoiced.

4 **Continue Charging**—Select to enable the system to continue generating invoice charges for the same work order. If selected, the system creates a new **Charge Number** when generating customer charges, assigns a new incremental number to a newly calculated charge record, and displays the difference in price between the actual and the existing calculation(s).

Note: **Continue Charging** is automatically selected for calculations for non-completed work orders.

5 **Comments**—Enter comments related to the work order costs.

6 **Corrections**—Enter the amount to adjust the work order costs. Enter deductions as negative amounts.

7 Click **Generate All Customer Charges**.

8 **Organization**—Enter the organization for which to calculate work order charges.

9 **Work Order**—Enter the work order for which to calculate work order charges.

10 **Customer**—Enter the customer for which to calculate work order charges.

11 **Department**—Enter the department for which to calculate work order charges.

12 **Released Work Orders**—Select to only calculate work order charges for released work orders.

13 **Print Report**—Select to print a report of all the calculated work order charges.

14 **Equipment**—Enter the equipment for which to calculate work order charges.

15 **Project**—Enter the project for which to calculate work order charges.

16 **Completed From and Completed To**—Enter the work order completion date range for which to calculate work order charges.

17 **Completed Work Orders**—Select to calculate work order charges for only completed work orders.

18 Click **Calculate**.
Note: If you did not specify any generation criteria, charges for all work orders of type JOB or PPM with a status of Released or Completed will be generated. The system verifies that the work order(s) have no parent work order and that the customer charges do not have a Status of Approved, Excluded from invoicing, or Invoiced.

Viewing charges for AMS-Customers

View a list of calculated charges for a customer. Calculated customer charges are accrued from work orders for which charges are compiled for external invoicing purposes based on the terms of an established customer contract.

To view charges for customers:

1. Open the AMS-Customers form.
2. Select the customer for which to view charges and then click the Charges tab.
3. View the customer charges information.

Creating and generating customer invoices

Generate customer invoices to create and assemble accounts receivable invoices for asset management service customers, work order charges, and fixed payments.

Caution: Customer invoices are only related to asset management services and should not be confused with the invoice voucher functionality in the Purchasing Management module. See "Recording invoice vouchers" on page 339.

You can generate customer invoices several different ways:

- Calculate customer charges and create a single customer invoice using the Create Customer Invoice right-click option on the Work Orders form. See "Creating customer invoices from work orders" on page 775.
- Generate customer invoices from the Customer Invoices form. See "Generating customer invoices" on page 776.
- Create an invoice for a work order

Upon initiation of the invoice generation process, the system locates all customer charge records and fixed charge schedules for customer contracts. The system does not recalculate the invoice charge records. See "Understanding the calculation of customer charges" on page 771. The system adds the total price for the customer(s) based on the specified invoice generation criteria. The system changes the Status of all work orders on the Approve Customer Charges form to Invoiced. See "Approving and generating customer charges" on page 772.

Depending on the specified generation criteria, the system generates separate invoices for each customer, for which the invoice organization is the organization of the customer contract.
**Note:** If a single customer is referenced on more than one customer contract and the customer contracts are from different organizations, the system generates invoices for each of the customer contract organizations.

You can also generate invoices for customers that are marked as **Out of Service**. See "Creating customers" on page 484.

### Understanding customer invoice generation

When you generate a customer invoice, the system retrieves the charge records generated by the customer charge process and then creates customer invoices displaying the **Total Price** for each work order. See "Understanding the calculation of customer charges" on page 771.

See the following list for additional information on the manner in which the system generates customer invoices:

- The system retrieves all customer charges and fixed charges for a customer contract.
- The system then generates the sum of the **Total Price** for the customer(s) based on the criteria specified on the Generate Invoices popup or the work order specified on the Create Invoice for WO popup.
- The system changes the status of all work orders on the **Approve Customer Charges** form to **Invoiced**.
- The system generates a separate invoice for each customer.

**Note:** If a single customer is referenced on more than one customer contract and the customer contracts are in different organizations, the system generates separate invoices for each of the customer contract organizations.

The system also enables you to generate invoices for customers that have been marked as **Out of Service**.

### Creating customer invoices from work orders

Create a customer invoice from a work order to calculate customer charges and create a single customer invoice for a specific work order.

To create customer invoices from work orders:

1. Open the **Work Orders** form.
2. Select the work order for which to create customer invoices and then click the **Record View** tab.
   
   **Note:** Enter or update any information on the work order as necessary. See "Creating regular work orders" on page 388 for more information.

3. Right-click on the form and then choose **Create Customer Invoice**.
Note: View the customer invoice created on the Customer Invoices form. See "Viewing invoices for AMS-Customers" on page 770.

Generating customer invoices

Generate customer invoices for all customers or for a single customer.

To generate customer invoices:

1. Open the AMS-Customer Invoices form.
2. Select the customer invoice for which to generate invoices and then click the Record View tab.
3. Right-click on the form and then choose Generate Invoices.
4. Organization—Enter the organization for which to generate invoices.
5. Work Order—Enter the work order for which to generate invoices. If you enter a work order, the system generates an invoice for only the specified work order.
6. Customer—Enter the customer for which to generate invoices. If you enter a customer, the system generates a single invoice that contains all the costs for the specified customer.
   Note: By default, the system generates customer invoices for all customers on the Customer Invoices form unless you specify a specific customer. The system enables you to generate invoices for a single work order by using the Create Customer Invoice right-click option on the Work Orders form. See "Creating customer invoices from work orders" on page 775.
7. Approved Customer Charges—Select to generate invoices for only those customer charges with a status of Approved.
   Note: Any corrections made on the Approve Customer Charges form are reflected on the invoice after it is generated. See "Approving and generating customer charges" on page 772.
8. Fixed Charges—Select to generate invoices for fixed charges. If you created a fixed charge schedule for a customer contract, you must select Fixed Charges to include the schedule on an invoice. See "Creating fixed charge schedules for customer contracts" on page 766.
9. Original Invoice—Enter the customer invoice to recalculate. If you specify an invoice to recalculate, the system generates a new invoice with the latest customer charges.
   Note: The system displays all customer invoices, including those with Cancelled status. You can use a wild card, e.g., "%", with partially-specified text strings anywhere within the field to retrieve strings containing the specified text.
   The recalculate invoice functionality does not make corrections to the original invoice. The system generates an updated invoice.
10. Start Date and End Date—Enter the start and end dates for which to generate invoices.
   Note: If no date range is specified, the system generates invoices for all Approved customer invoices.
   The date range specified refers to the date on which the work order was completed. The date range does not apply to released work orders.
11 **Unapproved Customer Charges**—Select to generate invoices for customer charges with a status of **Unfinished**.

12 Click **Generate**.

   **Note:** View details about the generated invoices on the **Customer Invoice Lines Overview** form. See "Viewing customer invoice lines" on page 778.

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**Creating invoices for work orders**

**Note:** Creating an invoice for a work order is only related to work performed for asset management services customers and should not be confused with the invoice voucher functionality in the Purchasing Management module. See "Recording invoice vouchers" on page 339 Chapter 4 **Purchasing Management**.

To create invoices for work orders:

1 Open the **AMS-Customer Invoices** form.
2 Click the **Record View** tab.
   
   **Note:** Because the customer invoice is being generated for a work order, the **Create Invoice for WO** right-click option is not affected by the selected customer invoice record. Although the right-click option is only available from the **Record View** page of the **Customer Invoices** form, the invoice is generated independently of the selected customer invoice record on the **Record View** page.

3 Right-click on the form and then choose **Create Invoice for WO**.

4 **Work Order**—Enter the work order for which to create an invoice.

5 Click **Submit**.

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**Viewing and changing the status of customer invoices**

View and change the status of customer invoice records.

**Note:** To assemble/generate customer invoices, right-click on the form for which the customer invoice generation option is available, and then choose **Create Customer Invoice**. See "Understanding customer invoice generation" on page 775.

To view and change the status of customer invoices:

1 Open the **AMS-Customer Invoices** form.
2 Select the customer invoice for which to view or change the status and then click the **Record View** tab.

3 **Status**—Select the status of the customer invoice
   
   **Note:** The system displays all available statuses for the EIV entity, including any user-statuses created on the **Status Authorizations** form. However, the system does not allow some status changes regardless of the status authorizations created on the **Status Authorizations** form. The
system allows the following status changes (and their user-status equivalents): Invoiced to Cancelled; Invoiced to Ready for Printing; Ready for Printing to Cancelled; and Ready for Printing to Invoiced.

4 Click **Save Record**.

**Viewing customer invoice lines**

View a list of all charge lines on a customer invoice.

To view customer invoice lines:

1 Open the **AMS-Customer Invoices** form.
2 Select the customer invoice for which to view invoice lines and then click the **Lines** tab.
3 View the customer invoice line information.

**Viewing an overview of customer invoice lines**

View an overview of customer invoice lines to access detailed information about all the charges on customer invoices.

To view an overview of customer invoice lines:

1 Open the **AMS-Customer Invoice Lines Overview** form.
2 View the customer invoice line information.
Budgets track expenses and set spending limits for specified time periods or items. Budgets coordinate with existing inventory. They also can be defined for predetermined time frames such as months, quarters, or years.

Defining budget setup information
Calendar types, structures, terms, and groups are required before creating budgets.

Defining budget calendar types
Calendar types are used to determine the number of reporting periods in a budget term.

To define budget calendar types:

1 Open the Budget Calendar Types form.
2 Click New Record.
3 Calendar Type—Enter a name for the calendar type, and then enter a calendar type description in the adjacent field.
4 Number of Periods—Enter the number of periods for this budget calendar type, e.g. 12 for a monthly calendar, 4 for quarterly.
5 Class—Enter the class for the calendar type. The system automatically populates Class Org.
6 Click Save Record.

Defining budget structures
Budget structures define levels for cost reporting. There are six levels available, but only one is required. Budget structures can be used by multiple budgets in a specific organization.
To define budget structures:

1. Open the **Budget Structures** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the budget structure hierarchy belongs if you use multi-organization security.
4. **Budget Structure**—Enter a name for the budget structure, and then enter a budget structure description in the adjacent field.
5. **Calendar Type**—Enter the calendar type for the budget structure.
6. **Level 1**—Select the first level of the budget structure hierarchy.
7. **Level 2**—Select the second level of the budget structure hierarchy.
8. **Level 3**—Select the third level of the budget structure hierarchy.
9. **Parent**—Enter a parent for the budget structure hierarchy.
   - **Note**: If the chosen parent contains budget structure levels, the levels will be copied to the new budget structure.
10. **Level 4**—Select the fourth level of the budget structure hierarchy.
11. **Level 5**—Select the fifth level of the budget structure hierarchy.
12. **Level 6**—Select the sixth level of the budget structure hierarchy.
13. Click **Save Record**.

### Defining budget terms

Budget terms consist of a calendar type defined by start and end dates, e.g. a 2006 monthly budget term or a 2006 quarterly budget. You can include a single budget term in multiple budgets.

To define budget terms:

1. Open the **Budget Terms** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the budget term belongs if you use multi-organization security.
4. **Budget Term**—Enter a name for the budget term, and then enter a budget term description in the adjacent field.
5. **Calendar Type**—Enter the calendar type for the budget term. The system automatically populates **Number of Periods**.
6. **Start Date**—Enter the start date for the budget term.
7. **End Date**—Enter the end date for the budget term.
8. Click **Save Record**.
Defining periods for budget terms

Periods for budget terms set the start and end dates for the terms. Default periods are created automatically when the budget term is saved. Periods can be changed or renamed as necessary.

To define periods for budget terms:

1. Open the Budget Terms form.
2. Select the budget term for which to set the period, and then click the Periods tab. The system automatically populates Sequence Number.
3. **Period**—Enter a new name for the period, e.g., January, February, or First Quarter.
4. **Start Date**—Enter the start date for the period.
5. **End Date**—Enter the end date for the period.
6. Click Save Record.

Defining budget groups

Create budget groups for different entities. Budget groups include Departments, Systems, Equipment, WO Locations, Cost Code, WO Cost Type, WO Job Type, and Project. Using budget groups saves time by assigning a budget amount to a group of items rather than to many single items, e.g., define a budget group for the HVAC group containing all pieces of equipment associated with the HVAC system.

To define budget groups:

1. Open the Budget Groups form.
2. Click New Record.
3. **Organization**—Enter the organization to which the budget group belongs if you use multi-organization security.
4. **Budget Group**—Enter a budget group name, and then enter a budget group description in the adjacent field.
5. **Entity**—Enter the entity for which to create a budget group. The system automatically populates entity description.
6. Click Save Record.

Assigning items to budget groups

Items can be combined to form budget groups, e.g., define a budget group for the HVAC group containing all pieces of equipment associated with the HVAC system In the HVAC group, a thermostat could be one item within the budget group. Items can belong to multiple budget groups.

To assign items to budget groups:

1. Open the Budget Groups form.
2 Select the budget group for which to assign an item, and then click the **Items** tab.

3 **Item**—Enter an item. The system automatically populates description and **Organization**.

4 Click **Submit**.

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### Defining budgets

Create and update budgets on the **Budgets** form. The budget combines a specific budget structure and term. Set a current amount and a person responsible.

To define budgets:

1 Open the **Budgets** form.

2 Click **New Record**.

3 **Budget Structure**—Enter a budget structure. The system automatically populates budget structure description, **Organization**, **Calendar Type**, **Date Created**, and **Status**.

4 **Budget Term**—Enter the budget term.

   **Note**: The budget **Calendar Type** should be the same as the budget structure **Calendar Type**.

5 **Date Created**—Change the creation date if necessary. **Date Created** can be in the past or future.

6 **Status**—Choose one of the following options:

   - **In Process**—Select for budgets not yet approved.
   - **Temporary value**—Select for budgets not yet approved.
   - **Final value**—Select for budgets not yet approved.
   - **Approved/frozen**—Select to approve or freeze the budget. You must create the Budget Details before you can select this status. See "Defining budget details" on page 783.

     If you select **Approved/frozen**, the system automatically populates **Original Amount**, **Approved By**, and **Date Approved**.

     If the status changes from **Approved/frozen** to any other status, the above fields are not affected and updated the next time the **Budget** is approved.

     **Temporary value**, **Final value**, and **Approved/frozen** are available in update mode only.

7 **Current Amount**—Enter the current budget amount.

8 **Person Responsible**—Enter the name of the person responsible for the budget.

9 **Total Sub-Budget Amount**—If budget details exist, this value is the total amount set up for its level one sub-budgets.

10 Click **Save Record**.
Defining budget details

Using the Details page of the Budgets form, combine budget information and assign specific monetary amounts to each budget area. The Details page contains budgeted amounts for individual budget items or groups within the structure of a budget. Define budgets according to dollar amount for individual budget items or for budget groups.

To define budget details:

1. Open the Budgets form.
2. Select the budget for which to view details, and then click the Details tab.
   
   Note: In the budget tree, the item code and organization will be displayed with the budget amount if details already exist. Descriptions are hover text only.

3. Click Add Budget. The system enables the Budget Details section. The system automatically populates Current Budget and Calculated Budget.
   
   Note: If you click Add Sub-Level Budget, the fields will display in the same manner but appear beneath the main budget heading for the next lower level in the budget structure.

4. Enter information in the required fields.
   
   Note: When adding budgets and sub-level budgets, the fields vary depending upon the levels set up in each budget structure. Complete the required fields as they display. For each budget, select an individual budget item or a budget group, and then assign a budget amount. All other fields are protected.

5. Budget Amount—Enter the amount for the currently selected budget. The system automatically populates the budget amount currency.

6. Click Submit.

Calculating budgets

Calculate a budget to gather costs from work orders. Depending on the scope of the budget, you may want to run the calculation process during down times, such as in the evening or on the weekends.

Note: Budgets are not automatically updated when you incur costs.

To calculate budgets:

1. Open the Budgets form.
2. Select the budget to calculate, and then click the Record View tab.

3. Right-click, and then select Calculate Current Budget. The system automatically populates Budget Structure, budget description, Budget Term, and term description.

4. From Period—Enter a starting period that corresponds to the Start Date of the Budget Term.

5. To Period—Enter an ending period that corresponds to the End Date of the Budget Term.

   Note: If From Period and/or To Period are left blank, the system calculates budget amounts for the earliest and latest periods.
6 Click Submit.

Copying budgets

The copy budget feature copies a Budget structure and term, including all the lower-level budget details.

To copy budgets:

1 Create a budget. See "Defining budgets" on page 782
2 Right-click, and then select Copy Budget. The system automatically populates Budget Structure, description, and Budget Term.
3 To Budget Structure—Enter a new budget structure. The system automatically populates the To Budget Structure description.
4 To Budget Term—Enter a new budget term.
5 Copy Budgeted Amounts—Select to copy only budgeted amounts.
6 Copy Actual Costs—Select to copy actual costs for the budget.

Note: Click Calculate Budget before copying budgets to ensure that actual costs are up-to-date.
7 Plus or Minus %—Enter the amount to adjust the budget, e.g. 10% over last year’s budgeted amount.
8 Calculate Zero-based Budget—Select to calculate a zero-based budget.
9 Reset Amounts to Zero—Select to set the copied term’s actual non-PM costs plus expected PM costs for the term to which you are copying. Resetting amounts to zero will include all maintenance due next term as well as the same amount of breakdowns as occurred in the most recent term.
10 Click Submit.

Copying sub-level budgets

Copy a node in the budget details structure to include sub-level budgets and all lower-level budget details. Copying sub-level budgets allows you to copy various budget subsets, i.e., the same list of equipment for every month or the same cost codes for every department.

To copy sub-level budgets:

1 Open the Budgets form.
2 Select the budget for which to copy a sub-level budget, and then click the Details tab.
3 Click Copy Sub-Level Budget. The system automatically populates From Budget and its description.
4 To Budget/To Budget Group—Enter the budget to which you want to copy the budget details or enter the budget group to which the new budget is copied. For example, if From Budget is January, you can copy it to a new budget for February. The system automatically populates To Budget Group and its description if To Budget is entered.
5 Copy Budgeted Amounts—Select to copy all budget amounts to the new budget.
6 **Reset Amounts to Zero**—Select to reset budget amounts to zero on all new records.
7 **Plus or Minus %**—Enter a percentage by which to adjust new values.
8 Click **Submit**.
Contracts

Purchasing contracts detail agreements for parts. Details include such information as suppliers, time-frames, and buyer facts as well as percentage discounts arranged for each contract according to order or duration.

Defining purchasing contracts

Purchasing Contracts detail agreements with specific suppliers for certain parts.

To define purchasing contracts:

1. Open the Purchasing Contracts form.
2. Click New Record. The system automatically populates Date Created and Own Contract.
3. Organization—Enter the organization to which the purchasing contract belongs if you use multi-organization security. The system automatically populates Status.
4. Purchasing Contract—Enter a description of the purchasing contract in the adjacent field. The system assigns a purchasing contract number after you save the record.
5. Status—Select a status for the purchasing contract.
6. Unfinished—Select if the contract is editable and has not been approved.

   Note: While system status is Unfinished, all fields are editable except Purchasing Contract, Organization, Supplier, Language, Currency, Printed, and Copy From.

7. Approved/active—Select if the contract has been approved. In order to be considered active, the contract may or may not be approved but the system date is in the range created by the start and end dates.
8. Cancelled—Select if the contract no longer effects purchase order changes.
9. Contract Class—Enter the contract class for the purchasing contract. The system automatically populates Organization.
10. Supplier—Enter the supplier for the purchasing contract. The system automatically populates Supplier Org., Language, and Currency.
11. Language—Select the language for the purchasing contract.
12. Currency—Select the currency for the purchasing contract.
13 **Store**—Enter the store to which items on the purchasing contract should be sent.

14 **Person Responsible**—Enter the name of the employee responsible for the purchasing contract.

15 **Start Date**—Enter the starting date for the purchasing contract.

16 **End Date**—Enter the ending date for the purchasing contract.

17 **Supplier Reference**—Enter the reference number for the supplier.

18 **Contact**—Enter the name of the contact person for the purchasing contract.

19 **Copy From**—Enter an existing purchasing contract to copy.

   **Note:** The **Copy From** contract must have the same **Currency** as the new contract.

20 **Renewal Date**—Enter the renewal date for the purchasing contract.

21 **Own Contract**—Select if the contract originated internally. Leave unselected if the contract originated externally (with the customer).

22 **Printed**—Select to have the system indicate when the contract has been printed.

   **Note:** If you select the **Printed** checkbox, the **Printed** checkbox on the reports form will be populated.

23 Click **Save Record**.

### Assigning parts to purchasing contracts

Add parts to purchasing contracts to define what is included in the contract.

To assign parts to purchasing contracts:

1 Open the **Purchasing Contracts** form.

2 Select the contract for which to assign parts, and then click the **Parts** tab.

3 Click **Add Part**.

4 **Part**—Enter the part to assign to the contract. The system automatically populates the part description and **Part Org.**, **UOP**, **Qty. per UOP**, **Supp. Catalog Reference**, **Net Price**, **currency**, **UOM**, and **Lead Time (Days)** default only if a Supplier Catalog record exists for the part.

5 **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.

6 **UOP**—Enter the unit of purchase for the part.

7 **Qty. per UOP**—Enter the quantity per unit of purchase.

8 **Supp. Catalog Reference**—Enter the supplier catalog reference for the part.

9 **Net Price**—Enter the net price for the part.

10 Click **Submit**.

### Defining part discounts for purchasing contracts

Add, update, and delete part discounts on a purchasing contract.
To define part discounts for purchasing contracts:

1. Open the **Purchasing Contracts** form.
2. Select the contract for which to define part discounts, and then click the **Part Discounts** tab.
3. Click **Add Part Discount**.
4. **Part**—Enter the part for which to assign a discount. The system automatically populates the part description, **Part Org., Purchase Price, UOP,** and **Supp. Catalog Reference**.
5. **Condition**—Enter the condition if the part is a condition tracked parent part. If the selected part is a condition tracked child part, the system will automatically populate **Condition**.
6. **Discount %**—Enter the percentage for the part discount.
7. Choose one of the following options:
   - **Minimum Qty.**—Enter the minimum quantity that must be purchased in order to receive the discount.
   - **Minimum Value**—Enter the minimum value for the discount.
8. **Apply to Each PO**—Select to apply the discount to each individual PO.
9. Click **Submit**.

### Defining order discounts for purchasing contracts

Add order discounts to purchasing contracts to indicate the manufacturer discounts available on specific orders.

To define order discounts for purchasing contracts:

1. Open the **Purchasing Contracts** form.
2. Select the contract for which to define order discounts, and then click the **Order Discounts** tab.
3. Click **Add Order Discount**.
4. **Minimum Value**—Enter the minimum value for the order discount.
5. **Discount %**—Enter the minimum value for the discount.
6. **Apply to Each PO**—Select to apply the order discount to each individual PO.
7. Click **Submit**.

### Defining clauses for contract classes

Modify, add, and delete lists of purchasing clauses for an existing contract class.

To define clauses for contract classes:

1. Open the **Clauses of Contract Class** form.
2. **Contract Class**—Enter the contract class for which to associate clauses. The system automatically populates the contract description and **Contract Class Org.**
Defining purchasing contract text

Purchasing contract text contains basic information about the contract. Text is predefined for the default contract class and contains such information as suppliers, timeframes, and buyer information. Purchasing contract text fields allow the user to change the text labels on the printed contract. Create and/or edit purchasing contract text to appear on the printed purchasing contract.

To define purchasing contract text:

1. Open the Purchasing Contract Text form.
2. Contract Class—Enter the contract class for which to define purchasing contract text. The system automatically populates the description and Contract Class Org.
3. Click Add Record.
4. Language—Select the language of the purchasing contract text.
5. Contract—Enter the contractor.
6. Supplier—Enter the vendor.
7. Start Date—Enter the contract period start.
8. End Date—Enter the contract period end.
9. Clauses—Enter the contract terms.
10. Financial Conditions—Enter the text label for the financial conditions section of the printed purchasing contract.
11. Per Order—Enter the text label for the per order discount details section of the printed purchasing contract.
12. Period—Enter the period discount.
13. Minimum Order Value—Enter the minimum order value.
14. Part—Enter the part.
15. Minimum Quantity—Enter the minimum quantity.
16. Minimum Value of Parts—Enter the minimum order line value.
17. Discount %—Enter the discount percentage.
18. Click Submit.
The Call Center module handles incoming customer requests for action, information, or comments. Use the call center module to query a knowledge base for information to help customers, or to facilitate the search process; search a GIS map to retrieve equipment for a work order; create a new work order; link a request to an existing work order; or record customer comments.

This module easily facilitates the call taker’s need for speed. Sections of the main Call Center form can be expanded or collapsed, with minimal need to open additional forms.

Understanding Call Center terms

See the following table to become familiar with the Call Center module’s unique attributes:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Request</td>
<td>A request made by a customer that becomes a work order or is linked to an existing work order</td>
</tr>
<tr>
<td>Address Alias</td>
<td>A popular name for an address, e.g., Haywood Mall or Cleveland Park</td>
</tr>
<tr>
<td>Attribute</td>
<td>A person, place, or thing associated with GIS layers and based only on the customer’s address, e.g., a council person, a school district, or tax map ID</td>
</tr>
<tr>
<td>Bulletin Board</td>
<td>A place in the system where you can view internal notices for your call center</td>
</tr>
<tr>
<td>Bulletin Board Notices</td>
<td>The actual notice that call center employees read or consult on the bulletin board</td>
</tr>
<tr>
<td>Calendar Group</td>
<td>A user-defined group for equipment with the same calendar periods</td>
</tr>
<tr>
<td>Calendar Group Period</td>
<td>A user-defined period of availability for a group of equipment, e.g., Spring Semester (03/01/08-04/30/08), Monday-Friday, 08:00-16:00</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contact</td>
<td>An address, employee, or customer used to identify the source of contact</td>
</tr>
<tr>
<td>Contact Number</td>
<td>The number the system automatically assigns a new contact</td>
</tr>
<tr>
<td>Customer Request</td>
<td>The record of an individual interaction with a customer, e.g., call record</td>
</tr>
<tr>
<td>Department</td>
<td>A department that offers information or service to customers through the call center</td>
</tr>
<tr>
<td>Knowledge Base (KB) Article</td>
<td>A searchable article that helps the call center employee facilitate customer requests. Knowledge Base Articles often contain a call script or other instructions.</td>
</tr>
<tr>
<td>Layer</td>
<td>When associated with a service problem code, GIS layers are used to filter features on the GIS map, e.g., street lights, water lines, etc.</td>
</tr>
<tr>
<td>Provider</td>
<td>An additional level of a department structure, used to route work to specific service providers within a single department</td>
</tr>
<tr>
<td>Service Category</td>
<td>An additional level of a department structure, used to filter service problem codes or KB articles based on categories of service problem codes.</td>
</tr>
<tr>
<td>Service Delivery Matrix</td>
<td>A pre-defined combination of Department, Provider, Service Category, and Service Problem Code associated to equipment to filter lookups and knowledge base articles.</td>
</tr>
<tr>
<td>Service Problem Code</td>
<td>A code that identifies a specific problem or request. Service problem codes are required when creating a work order from a customer request.</td>
</tr>
</tbody>
</table>

### Understanding Call Center

The call center serves three main purposes: answering requests for information (information request), scheduling an action for requests (action request), and recording customer comments (comment).

Typically, customers call, email, or fax the call center with an issue. The call center employee responds by attempting to solve the customer’s problem, handling it according to the request type.

Record each customer request to provide accurate reporting on request volume. As soon as the customer contacts the call center, click save to create a new record before you take any information. The type of request determines which sections of the form need to be filled in. Many call centers require
employees to perform a KB search for each customer request so that standard procedures are followed (e.g., call scripts).

Information requests

Customers may contact the call center asking for information, e.g., when is the concert in the park?. Perform a search of the knowledge base for the requested information. The knowledge base is a database of articles created by supervisors of the call center to help facilitate the information request process.

A knowledge base article can consist of a call script or phone numbers to read to the customer, an external URL link that will answer the request, or a link to another KB article. Consult the article and relay the requested information to the customer. Typically, information requests do not generate work orders. After the requested information is relayed to the customer, the call usually ends. However, if the customer requires any work to be performed after the information request, the call becomes an action request.

Action requests

Action requests usually involve a problem the customer has. To solve action requests, create a customer request, which typically becomes a work order, or link the customer request to an existing work order, e.g., a customer contacts the call center to request the removal of a washing machine from their driveway. Create a customer request for the problem, filling in the customer’s information as needed. If this is the first report of the problem, create a work order. However, if the problem has already been reported, then create a customer request from the new customer and link it to the existing work order.

Departmental hierarchies

- **Departments**—A department is the umbrella under which providers, service categories, and service problem codes fall. It is the top of the hierarchy. An example of a department is "Environmental Services."
- **Providers**—Providers refer to the levels within a department directly above a service category that handles the service needed. An example of provider is "Solid Waste."
- **Service Categories**—Service categories fall under a provider and help filter service problem codes. Service categories represent the service needed. An example of a service category is "Residential Garbage Pickup."
- **Service Problem Codes**—Service problem codes identify specific problems and any information needed to provide solutions. A service problem code is required in order to create a work order from a customer request. An example of a service problem code is "Appliance Pickup." The appliance pickup problem is assigned a "code" that tells the system that a stove, washer, dryer, or other
appliance needs to be picked up when that code is entered into the system. This service problem code has a standard work order for appliance pickup.

Comments

Occasionally, customers call with comments, but no desire for information or need for work performance. The comment may be about the new call center, an especially helpful employee, or other messages that require no follow-up or action. The call center employee records the comment.

Setting up basic Call Center information

To set up basic call center information, create service problem codes, associate layers with service problem codes, and create providers, service categories, departments, and knowledge base articles.

Entering contact information

Enter contact information for follow up and informational purposes.

Note: Each contact must have either a Name, Address, or Employee Code before the system saves the contact information.

To enter contact information:

1 Open the Contact Information form.
2 Click New Record.
3 Name—Enter a first name, middle initial, and last name for the contact.
4 Company Name—Enter the name of the company where the contact works.
5 Employee—Enter an employee code for the contact if applicable. The system automatically populates the employee name in the adjacent field.
6 Address 1—Enter an address for the contact.
7 Address 2—Enter an address for the contact.
8 City—Enter the city of the contact.
9 State—Enter the state of the contact.
10 Zip Code—Enter the zip code of the contact.
11 Address Alias—Enter a popular name for the address, e.g., Gwinnett Place Mall or Finley Park.
12 Primary E-mail—Enter a primary e-mail address for the contact.
13 Secondary E-mail—Enter a work e-mail address for the contact.
14 Notes—Enter any applicable notes for the contact.
15 Organization—Enter the organization to which the contact belongs.
16 **Class**—Enter the class to which the contact belongs.

17 **Primary Phone**—Enter a primary phone number for the contact.

18 **Secondary Phone**—Enter an alternate phone number for the contact.

19 **Third Phone**—Enter a third phone number for the contact.

20 **Primary Fax**—Enter a home fax number for the contact.

21 **Secondary Fax**—Enter a work fax number for the contact.

22 **E-mail Fax**—Enter the e-mail address for the contact if you use fax software that requires an e-mail address.

23 Click **Save Record**.

**Associating equipment with contact information**

For contacts with specific equipment, associate one or more pieces of equipment with the contact information record.

**Note:** Specific equipment can be a system, position, asset, or location.

To associate equipment with contact information:

1. Open the **Contact Information** form.
2. Select the contact for which to associate equipment, and then click the **Equipment** tab.
3. Click **Add Equipment**.
4. **Equipment**—Enter the equipment to associate with the contact.
   
   The system automatically populates the equipment description and **Organization**.

   **Note:** **Equipment** is multi-select to save time.

5. **Type**—Select the request type for the equipment.
6. Click **Submit**.

**Creating service problem codes**

Service problem codes identify requests, concerns, or problems that customers frequently experience. Create service problem codes that are specific to your customer needs. With any call type your employee can enter a specific service problem code to provide reporting on frequency of that type of call. The service problem code may also contain all the information needed to create a work order.

To create service problem codes:

1. Open the **Service Problem Codes** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the service problem code belongs if you use multi-organization security.
4. **Service Problem Code**—Enter a unique code identifying the service problem, and then enter a description of the service problem code in the adjacent field.
5 **WO Type**—Select a type of work order to create for the service problem code.
6 **Standard WO**—Enter the standard work order with which to associate the service problem code.
7 **Priority**—Select the priority for work orders created from this service problem code.
8 **Class**—Enter the class with which to associate the service problem code. The system automatically populates **Class Org**.
9 **Equipment**—Enter the equipment to associate with the service problem code. The system automatically populates **Equipment Org**.
   
   **Note:** **Equipment** can also be selected on the **Call Center** form or GIS map when processing an action request.

10 **Out of Service**—Select if the service problem code is not used.
11 **WO Class**—Enter the work order class with which to associate the service problem code. The system automatically populates **WO Class Org**.
12 **Temporary Fix Turnaround**—Enter the amount of time it will take for the problem to be fixed temporarily by entering in an amount, and then select the unit of time.
13 **Permanent Fix Turnaround**—Enter the amount of time it will take for the problem to be fixed permanently by entering in an amount, and then select the unit of time.
   
   **Note:** **Temporary Fix Turnaround** and **Permanent Fix Turnaround** are used to calculate promise dates on the **Call Center** form when **Service Problem Code** is selected.

14 **Penalty Factor**—Enter the penalty factor with which to associate the service problem code.
15 **Equipment Usability**—Enter the code identifying the equipment's usability. The system automatically populates **Equipment Usability Org**.
   
   **Note:** **Equipment Usability** is used in penalty reports when penalty amounts depend upon equipment usability.

16 Click **Save Record**.

### Associating GIS map layers with service problem codes

For each service problem code you create, you can associate GIS map layers. Layers might include street lights, water lines, or other features to which a service problem code applies.

When the call taker opens the map for a particular address, the system displays the relevant equipment layer based upon the service problem code.

To associate GIS map layers with service problem codes:

1 Open the **Service Problem Codes** form. The system displays the **List View** page.
2 Select the service problem code for which to associate a layer, and then click the **Layers** tab.
3 Click **Add Layer**.
4 **Layer**—Select a layer with which to associate the service problem code.
5 Click **Submit**.
**Creating providers**

Providers facilitate knowledge base searches in the call center and provide additional levels of reporting for a department.

To create providers:

1. Open the **Providers** form.
2. Click **New Record**.
3. **Organization**—Enter the organization to which the provider belongs.
4. **Provider**—Enter a unique code identifying the provider, and then enter a description of the provider in the adjacent field.
5. **Address 1**—Enter an address for the provider.
6. **Address 2**—Enter an address for the provider.
7. **City**—Enter the city of the provider.
8. **State**—Enter the state of the provider.
9. **Zip Code**—Enter the zip code of the provider.
10. **Primary E-mail**—Enter the primary e-mail address for the provider.
11. **Secondary E-mail**—Enter an alternate e-mail address for the provider.
12. **Contact**—Enter the contact person for the provider.
13. **Preferred Method of Contact**—Select the method by which the contact prefers to receive correspondence.
14. **Class**—Enter the class to which the provider belongs.
15. **Out of Service**—Select if the provider is not used.
16. **Primary Phone**—Enter the primary phone number for the provider.
17. **Secondary Phone**—Enter an alternate phone number for the provider.
18. **Third Phone**—Enter the third phone number for the provider.
19. **Primary Fax**—Enter the primary fax number for the provider.
   - **Secondary Fax**—Enter an alternate fax number for the provider.
20. **E-mail Fax**—Enter the e-mail address for the provider if you use fax software that requires an e-mail address.
21. Click **Save Record**.
Creating service categories

Service categories facilitate knowledge base searches in the call center and provide additional levels of reporting for a department.

To create service categories:

1. Open the Service Categories form.
2. Click New Record.
3. Organization—Enter the organization to which the service category belongs.
4. Service Category—Enter a unique code identifying the service category, and then enter a description of the service category in the adjacent field.
5. Class—Enter the class of the service category.
6. Out of Service—Select if the service category is not used.
7. Click Save Record.

Creating department structures

Create department structures consisting of providers, service categories, and service problem codes.

To create department structures:

Note: Add both a parent and child record at the same time. The system adds both to the structure.

1. Open the Departments form.
2. Select the department for which to create a structure, and then click the Structure tab. The system automatically displays the department in the Department Structure tree.
3. Click Add Record.
4. Provider—Enter the provider for this department.
5. Service Category—Enter the service category.
7. Click Save Record.

Note: If you delete a parent record, the system deletes all of its child records, e.g., deleting Provider 1 will also delete Category 1 and Service Problem Code 1 from the structure.

Creating service delivery matrixes for equipment

Create service delivery matrixes to filter Department, Provider, Service Category, and Service Problem Code lookups on the Call Center form and in the Knowledge Base based on the selected equipment. See "Selecting options for the Call Center form" on page 803.
Note: Service Delivery Matrix must be selected for Service Problem Code Validation on the Call Center Setup form before a service delivery matrix can be created for selected equipment.

To create service delivery matrixes for equipment:

1. Open the Assets, Positions, or Systems form.
2. Select the asset, position, or system for which to create a service delivery matrix, and then click the Service Matrix Delivery tab.
   
   Note: Service Delivery Matrix must be selected on the Record View page of the selected asset before the system displays the Service Delivery Matrix page.

3. Click Add Record.
4. Department—Enter the department that which is valid for the selected equipment. The system automatically populates Department Org.
5. Provider—Enter the provider that which is valid for the selected equipment. The system automatically populates Provider Org.
6. Service Category—Enter the service category that which is valid for the selected equipment. The system automatically populates Service Category Org.
7. Service Problem Code—Enter the service problem code that which is valid for the selected equipment. The system automatically populates Service Problem Code Org.
8. Click Submit.

   Note: To copy a service delivery matrix for child equipment, select the service delivery matrix, and then click Copy to Every Child Matrix. The system copies the service delivery matrix to the Service Delivery Matrix page of every child equipment with Service Delivery Matrix selected on its record in the service delivery matrix already.

   To import a matrix, select the service delivery matrix to import to, and then click Import Matrix. Select the equipment from which to import the matrix, and then click Submit.

Defining calendar groups for equipment

Define a calendar group code for equipment that share periods of availability.

To define calendar groups for equipment:

1. Open the Calendar Groups form.
2. Click New Record.
3. Organization—Enter the organization of the equipment.
4. Calendar Group—Enter the calendar group, and then enter a description in the adjacent field.
5. Class—Enter the class of the equipment.
6. Out of Service—Select if the calendar group is not used.
7. Click Save Record.
Defining calendar periods for calendar groups

Define periods of availability for calendar groups to calculate penalties and for reporting purposes.

To define calendar periods for calendar groups:

1. Open the Calendar Groups form.
2. Select the calendar group for which to define periods, and then click the Calendar Periods tab.
3. Click Add Calendar Period.
4. Calendar Period—Enter the name of the calendar period.
5. Start Date—Enter the date the calendar period starts.
6. End Date—Enter the date the calendar period ends.
7. Monday Start Time—Enter the start time for Mondays during the calendar period.
8. Monday End Time—Enter the end time for Mondays during the calendar period.
9. Tuesday Start Time—Enter the start time for Tuesdays during the calendar period.
10. Tuesday End Time—Enter the end time for Tuesdays during the calendar period.
11. Wednesday Start Time—Enter the start time for Wednesdays during the calendar period.
12. Wednesday End Time—Enter the end time for Wednesdays during the calendar period.
13. Thursday Start Time—Enter the start time for Thursdays during the calendar period.
14. Thursday End Time—Enter the end time for Thursdays during the calendar period.
15. Friday Start Time—Enter the start time for Fridays during the calendar period.
16. Friday End Time—Enter the end time for Fridays during the calendar period.
17. Saturday Start Time—Enter the start time for Saturdays during the calendar period.
18. Saturday End Time—Enter the end time for Saturdays during the calendar period.
19. Sunday Start Time—Enter the start time for Sundays during the calendar period.
20. Sunday End Time—Enter the end time for Sundays during the calendar period.
21. Click Submit.

Creating knowledge base articles

Create knowledge base articles to reference when assisting customers. Knowledge base articles can contain instructions for call center employees, links to websites, or separate documents for the customer.

To create knowledge base articles:

1. Open the Knowledge Base Articles form.
2. Click New Record.
3. Organization—Enter the organization.
4. Knowledge Base Article—Enter a unique code to identify the article, and then enter a title for the article in the adjacent field.

Note: If AUTOKBNUM=YES the system automatically numbers the KB article. Contact your system administrator for more information.
5 **Language**—Select the language for the article text and information.

6 **Status**—Select the status for the article.

   **Note:** The system does not display articles with an Obsolete status during a knowledge base article search.

7 **Department**—Enter the department with which to associate the article.

8 **Provider**—Enter the provider with which to associate the article.

9 **Service Category**—Enter the service category with which to associate the article.

10 **Service Problem Code**—Enter a service problem code with which to associate the article. The system automatically populates **Service Problem Code Org**.

   **Note:** The system copies Department, Provider, Service Category, and Service Problem Code to the customer request when the article is selected from the knowledge base.

11 **Keywords**—Enter words that identify the article when performing KB searches.

12 **Remarks**—Enter remarks about the article.

13 **Article Text**—Enter the body text of the article. Within Article Text you can link documents, other knowledge base articles, and external web pages to the knowledge base article you are creating with the HTML Editor. Click **Hyperlink** to link a document, knowledge base article, or web address.

   **Note:** Copy and paste from existing documents to save time.

14 Click **Save Record**. The system automatically populates Created By, Date Created, Last Updated By, and Date Last Updated.

**Viewing associated service delivery matrixes and knowledge base articles**

Each equipment record can have a service delivery matrix defined with allowable combinations of Department, Provider, Service Category, and Service Problem Code. When a knowledge base article is created with the referenced values for the department, provider, service category, and service problem code, the system creates a viewable record of the association.

To view associated service delivery matrixes and knowledge base articles:

1 Open the **Knowledge Base Articles** form.

2 Select the knowledge base article for which to view an associated service delivery matrix, and then click the **Service Delivery Matrix Equipment** tab.

3 View the information.

**Creating bulletin board notices**

Create, edit, and view bulletin board notices from the **Call Center** form.

To create bulletin board notices:

1 Open the **Bulletin Board Notices** form.
2 Click New Record. The system automatically populates Created By and Date Created.
3 Organization—Enter the organization to which the bulletin board notice belongs.
4 Language—Select the language in which to create the notice.
   Note: To create a notice in more than one language, create separate bulletin board notices for each language.
5 Importance—Select the level of importance for the notice. The system displays icons on the bulletin board indicating the selected level of importance.
6 Knowledge Base Article—Enter the article to which a hyperlink should be displayed on the bulletin board.
7 Start Date—Enter the start date for displaying the notice on the bulletin board.
8 End Date—Enter the end date for displaying the notice on the bulletin board.
   Note: If you do not enter a Start Date and End Date, the system displays the notice on the bulletin board until an End Date is entered or the notice is deleted.
9 Title—Enter the title for the notice.
10 Notice—Enter the details of the notice.
11 Click Save Record. The system automatically populates Bulletin Board Notice.

Defining event log type filters

Define which event log types are selectable in the Event Log Type for combinations of Source (Call Center or WO), WO Type, and WO Class.

To define event log type filters:
1 Open the Event Log Type Filter form.
2 Click New Record.
3 Source—Select the screen for which the event log type will display.
4 Event Log Type—Select the type of event log to display for the Source, WO Type, and WO Class.
5 WO Type—Enter the work order type for which the event log type will display.
6 WO Class—Enter the work order class for which the event log type will display.
7 Click Save Record.

Setting up the Call Center form

Set up the Call Center form by selecting default values and the options to display on the form.
Selecting options for the Call Center form

Select the options for the Call Center form to expedite the customer request process.

To select options for the Call Center form:

1. Open the Call Center Setup form.
2. Select the organization for which to select options, and then click the Record View tab.
3. Default Source—Select the source to display as the default source on the Call Center form.
4. Default WO Status—Select the default status to display when creating a work order on the Call Center form.
5. Default WO Org.—Enter the organization to display as the default work order organization when a work order is created and the system cannot determine the work order organization from the service problem code or equipment.
6. Default Type—Select the default request type.
7. Default Find Customer By—Select the default option to search by when searching for contact information.
8. Use Default Organization—Select to use the call taker's default organization on the Call Center form.

Note: If unselected, the call taker must pick an organization for each caller on the Call Center form.

9. Open Request Status when WO Closes—Select the status to assign to open customer requests when the work order to which they are linked is closed.

Note: This refers only to customer requests that are open.

- Open—Select to keep the customer request open when the work order closes.
- Follow-up—Select to flag the customer request for follow up when the work order closes.
- Closed—Select to close the customer request when the work order closes.
- Cancelled—Select to cancel the customer request when the work order closes.

10. Follow-up Request Status when WO Closes—Select the status to assign to follow-up customer requests when the work order to which they are linked is closed:

Note: This refers only to customer requests marked for follow-up.

- Open—Select to open the customer request when the work order closes.
- Follow-up—Select to flag the customer request for follow-up when the work order closes.
- Closed—Select to close the customer request when the work order closes.
- Cancelled—Select to cancel the customer request when the work order closes.

Note: You may define more statuses to meet your call center requirements. Contact your system administrator for more information.

11. Top Ten Lookback Days—Enter the number of days for which to calculate the top ten knowledge base articles, e.g., enter 10 to view the top ten articles for the last 10 days, or enter 6 to view the top ten articles for the last 6 days.
12 Minimum Penalty—Enter the minimum penalty amount that must be met before a penalty can be deducted from the maintenance fee.

13 Service Problem Code Validation—Select one of the following options:

- **Department Structure**—Select to define a hierarchy of department, provider, service category, and service problem code on the Department Structure page of the Departments form. Equipment and service problem code do not restrict one another, e.g., a service problem code for tree removal does not need to be linked to every possible parcel within a city. Call takers may select tree removal as the service problem code, and then select the property location for the problem.

- **Service Delivery Matrix**—Select to configure a matrix of valid department, provider, service category, and service problem code combinations for equipment on the Service Delivery Matrix page of the Equipment form. If selected, only equipment with service delivery matrix flagged can be selected.

**Note:** Service Delivery Matrix is very restrictive and requires more maintenance.

**Note:** The equipment must be flagged as Service Delivery Matrix in order for the lookups and KB search to be filtered on the equipment.

14 Event Log Type Filter—Select to restrict event types in the Event Log popup on the Call Center form. See "Defining event log type filters" on page 802.

15 Allow Request to be Closed while WO is Open—Select to allow the call taker to close the customer request while the work order is open.

**Note:** If unselected, the system does not allow a status change to Closed on customer requests linked to open work orders.

16 Populate Customer Information on Unsuccessful Search—Select to always copy the information used to search for a customer, e.g., copy customer name or phone number to the customer information section when the customer is not located through Find Customer By.

17 Allow New Contact to be Saved on Customer Request—Select to allow the system to save a new Contact Information record on the Customer Request section of the Call Center form.

**Note:** Unselect if only authorized callers are allowed, or if only addresses are stored on the Contact Information record.

18 Use Department Structure Values Only Once—Select to use each value in the department hierarchy of provider, service category and service problem code only once.

**Note:** Provider, Service Category, and Service Problem Code can appear in the department structure only once. If you select a service problem code, the system automatically populates Department, Provider, Service Category, and Service Problem Code based on the associated department structure. Unselect to use a service problem code for more than one department, service category, or provider.

Follow these steps to select options for the duplicate work order check on the Action Request section.

19 Enable Duplicate WO Check—Select to enable the system to check for duplicate work orders. The system displays the duplicate work orders in Work Order on the Work Orders popup on the
**Call Center** form. When duplicate work orders exist, users can link to an existing work order or create a new one.

**20 Days to Show Closed WOs**—Enter the number of days to show a work order when the work order has closed.

**Note:** Specify the **Days to Show Closed WOs** to reduce the number of possible duplicate work orders to display for the equipment. Leave it blank to show only work orders that are still open. Enter 0 to show work orders that were closed today or enter 1 for yesterday, etc.

**21 Days to Show Open WOs**—Enter the number of days to show the work order after the work order was created, e.g., enter 0 to show work orders created on the current date only, enter 1 to show work orders created one day prior to the current date, or leave it blank to include all open work orders.

**22 WO Types**—Enter the work order types to allow call takers to link to customer requests, e.g., enter Breakdown and Repairable Spare to allow the call takers to select work orders of Breakdown and Repairable Spare type only. Enter null to allow call takers to link customer requests to all work order types.

**23 WO Statuses**—Enter the work order statuses of which to allow call takers to link customer requests.

**24 Match WO Header Equipment Only**—Select to display work orders when at least one equipment record on the **Call Center** form matches the WO header equipment.

**25 Match Equipment on WO Header or Equipment Tab**—Select to display work orders when at least one equipment record on the **Call Center** form appears on the WO header or the **Equipment** page of the **Work Orders** form.

**26 Match Service Category**—Select to display work orders when **Service Category** matches the service category of the customer request.

**27 Match Service Problem Code**—Select to display work orders when **Service Problem Code** matches the service problem code of the customer request.

Follow these steps to select options for the Knowledge Base popup.

**28 KB Results Per Page**—Enter the number of knowledge base articles to display per page after a knowledge base article search.

**29 Show Service Category in Knowledge Base**—Select to display the service category in the knowledge base.

**30 Show Provider in Knowledge Base**—Select to display the provider in the knowledge base.

Follow these steps to select options for the GIS Map Search popup.

**31 Show Service Problem Code in Knowledge Base**—Select to display the service problem code in the knowledge base.

**32 Highlight on Map**—Select to have the option to highlight addresses on the map.

**33 Identify Features**—Select to have the option to identify features on the map.

**34 Show Children**—Select to have the option to show child equipment on the map.

**35 View Nearest Address**—Select to have the option to view the nearest address on the map.

**36 Schedule WOs**—Select to have the option to schedule work orders from the map.

**37 Click Save Record.** The system automatically populates **Date Last Updated** and **Last Updated By**.
Specifying GIS attributes for the Call Center form

Select GIS layer attributes based on the customer address to display on the Additional Info popup of the Call Center form.

To specify attributes for the Call Center form:

1. Open the Call Center Setup form.
2. Select an organization, and then click the GIS Attributes tab.
3. Click Add Attribute. The system inserts a new Attribute Details record.
4. Layer—Select the layer for which to choose attributes.
5. Attribute—Select the attribute to appear on the popup.
6. Alias—Enter an alias for the attribute. If your attribute name is PC_Parcid enter Parcel Number in Alias.
7. Click Submit.

Defining usability codes for equipment

Define usability codes for equipment to calculate penalties for facilities management reports. Use equipment usability codes such as Available for Use or Unavailable to determine equipment usability.

To define usability codes for equipment:

1. Open the Call Center Setup form.
2. Click the Equipment Usability Codes tab.
3. Click Add Equipment Usability Code.
4. Equipment Usability—Enter an equipment usability code, and then enter a description of the equipment usability code in the adjacent field.
5. Penalty Factor—Enter a penalty factor for the equipment usability code.
6. Out of Service—Select if the equipment usability code is out of service.
7. Click Submit.

Processing customer requests

Edit contact information, search a GIS map to retrieve equipment for a work order, create a new work order, link to an existing work order, record customer comments, query the knowledge base search, or view bulletin board notices.
Entering customer requests

To enter customer requests:

1. Open the Call Center form.
2. Click New Record.
3. Organization—Enter the organization of the request.
4. Status—Select the status for the request.
5. Source—Select the request source.
6. Type—Select the request type.
7. Class—Enter the class for the request linked to the work order from the problem code.
8. Assigned To—Enter the Call Center employee assigned to the request. The system automatically populates Request Taken By and Request Date.
9. Click Save Record. See "Viewing customer requests for work orders" on page 486.

Performing a customer search

To perform a customer search:

1. Open the Call Center form.
2. Click New Record.
3. Find Customer By—Choose one of the following options to search for a customer:
   • Phone—Select to locate a customer by phone number in the system. The system searches all phone fields, not just the primary phone.
   • Employee Code—Select to locate call center employees by their codes.
   • Last Name—Select to locate customers by their last names.
   • First Name—Select to locate customers by their first names.
   • Employee Name—Select to locate call center employees by names.
   • Address—Select to locate customers by their address in the system.
4. Enter data in that contains, e.g., if you chose to search by Phone, enter the phone number, and then click Search to begin the search process.

Note: If exactly one match is found, the system populates the information in the Customer Information section.
If more than one match is found, select the correct match from the Customer Information lookup.
If no match is found, the system copies the search criteria information to the Customer Information section.
Entering customer information

To enter customer information:

1. Open the **Call Center** form.
2. Click **New Record**.
3. **Name**—Enter the customer's first name, middle initial, and last name.
4. **Employee Code**—Enter the code for the employee. The system automatically populates **Employee Name**.
5. **Address 1** and **Address 2**—Enter an address.
   - **Note:** Click **Copy to Work Address** to copy **Address 1** or **Address 2** to the work address on the action request.
6. **City**—Enter the city.
7. **State**—Enter the state.
8. **Zip Code**—Enter the zip code.
9. **Primary Phone**—Enter the phone number.
10. **Secondary Phone**—Enter a second phone number.
11. **Third Phone**—Enter a third phone number.
12. **Primary Fax**—Enter fax number.
13. **Secondary Fax**—Enter a second fax number.
14. **Primary E-mail**—Enter an email address.
   - **Note:** Click **Launch E-mail** to send an email message to the customer.
15. **Secondary E-mail**—Enter a second email address.
16. **Address Alias**—Enter a popular name for an address, e.g., Haywood Mall or Cleveland Park.
17. **Notes**—Enter notes specific to the customer.
   - **Note:** Click **Save as New** to save the customer information to a new contact information record. See "Entering contact information" on page 794. The system automatically populates **Customer**. Click **Save Changes** to save any changes made to this customer's information to the existing contact information record.
   - If you do not wish to save the information to a contact information record, leave the information added and navigate to another section. The system saves the new information to the customer request, not to the contact information record.

Viewing additional information

View information based on the **GIS Attributes** page of the **Call Center Setup** form and Address 1 in the **Customer Information** section.

To view additional information:
1 Open the Call Center form.
2 Select the customer request for which to view additional information, and then click the Record View tab.
3 Click Additional Information.
4 View the additional information.
   Note: If the system finds more than one address match, select the address for which to show attributes from the lookup, and then click Next to view the Additional Info popup.
5 Click Close.

Viewing the event log
View the progress of a customer request or work order.

To view the event log:
1 Open the Call Center form.
2 Select the customer request for which to view the event log, and then click the Record View tab.
3 Click Event Log.
4 Click Add Event.
5 Date/Time—Enter a date and time for the event.
6 Event Log Type—Select a type for the event.
7 From Value—Enter a value.
8 To Value—Enter a value.
   Note: From Value and To Value are highly configurable and may represent any value of your choice, for example, From Value could represent the email address of a sender, and To Value could represent the email address of the recipient, etc.
9 Click Close. The system automatically populates User and Field.

Performing a knowledge base search
To perform a knowledge base search:
1 Open the Call Center form.
2 Click New Record.
3 Search Criteria—Enter the words to search for in the knowledge base.
4 Choose one of the following to specify search criteria results:
   • Keyword Search—Select to search the knowledge base for articles with key words that match the criteria.
• **Full Text Search**—Select to search the contents of the knowledge base for the search criteria entered.

5 **Department**—Enter a department to narrow the search.

6 **Provider**—Enter a provider to narrow the search.

7 **Service Category**—Enter a service category to narrow the search.

8 Click **Search**. The system automatically populates **Search Criteria, Keyword Search/Full Text Search, Department, Provider, Service Category**, and **Service Problem Code** with the information from the **Call Center** form.

9 Click the title of the article that closely matches your search.

**Note:** If you are familiar with an article and see the service problem code you need, click **Add Article to Customer Request** next to the article. The system adds the article to the customer request. The system adds the article, **Department, Provider, Service Category**, and **Service Problem Code** to the **Call Center** form.

**Note:** Click **Add Article to Favorites** to add the article to My Favorites.

Click **Remove Article from Favorites** to remove the article from My Favorites.

Click **Print Article** to print the article.

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**Viewing the results of the knowledge base search**

View the results of the knowledge base article search, your favorite articles, or your most recent search results.

**Viewing the results summary**

To view the results summary of a knowledge base search:

1 Perform a knowledge base search. See "Performing a knowledge base search" on page 809.
2 Click **Total Articles Found** to view all articles from the search.
3 Click **Articles w/ Service Problem Codes** to view only the articles that have a service problem code.

**Viewing my recent searches**

To view my recent searches:

1 Perform a knowledge base search. See "Performing a knowledge base search" on page 809.
2 Click the saved search to display the article.

**Note:** The system displays your 5 most recent searches during the period of login. The search is cleared when you log out.
Viewing my favorites

To view my favorites:

1. Perform a knowledge base search. See "Performing a knowledge base search" on page 809.
2. Click the title of the article to display the article.
   
   **Note:** If you log out, the system does not delete this list.

Viewing the top 10 knowledge base articles

To view the top 10 knowledge base articles:

1. Open the **Call Center** form.
2. Click the **Record View** tab.
3. Click **Expand/Collapse** on **Top 10 KB Articles**.
4. Click the title of the desired KB Article to display the article in the Knowledge Base.

Processing an action request

To process an action request:

1. Open the **Call Center** form.
2. Click **New Record**.
3. Choose one of the following options:
   
   - **Work Address**—Enter the address or intersection where work is requested.
   - **Landmark**—Enter a popular landmark to retrieve an address if the exact work address is not known.

   **Note:** If you copied **Address 1** or **Address 2** from Customer Information, the system inserts the address in Work Address.

   Click **Additional Information** to view additional information based on the **Work Address**. See "Viewing additional information" on page 808.

4. **Equipment**—Enter the equipment on which to perform work. The system automatically populates **Equipment Org.** and **Equipment Description**.

   **Note:** Click **View Customer Equipment** to view and select from equipment associated with this customer.

   Click **Additional Equipment** to view and select from all equipment associated with this customer.

   The system automatically populates **Multiple Equipment** if more than 1 equipment is selected.
5 **Service Problem Code**—Enter the service problem code. The system can automatically populate **Service Problem Code** for the work order based on the selected knowledge base article. See "Performing a knowledge base search" on page 809.

6 **Temporary Fix Promise Date**—Enter the date by which the work will be fixed temporarily.

7 **WO Class**—Enter the class of the work order.

8 **Equipment Usability**—Enter the code identifying the equipment's usability. The system automatically populates **Equipment Usability Org**.

   **Note:** **Equipment Usability** is used in penalty reports when penalty amounts depend upon equipment usability.

9 **Permanent Fix Promise Date**—Enter the date by which the work will be fixed permanently.

10 Click **View Map**.

11 Perform a GIS map search. See "Performing a GIS map search (Infor EAM)" on page 721 for information on searching the GIS map.

12 Choose one of the following options:
   - **Return Equipment**—Click to return equipment to the action request.
   - **Return Work Order**—Click to return a work order to the action request. The system associates the customer request with this existing work order.
   - **Close**—Click to close the **GIS Map Search** page.
   - **Associate Map**—Click to attach the map to the customer request as a .PDF file.
   - **Update Work Address**—Click to update the work address on the **Call Center** form with the selected equipment. This is used when the equipment is a physical address.

   **Note:** If you attach the map to the customer request, click the **Documents** tab to view it. If your system does not have the GIS module, select **Equipment** from the list of values.

13 Enter linear reference information. The system only displays Linear Reference Details if the equipment record for which to create the work order is a linear equipment record. See "Defining regular work order headers" on page 389.

14 Click **Create WO**.

15 Choose one of the following options:
   - **Link work order to customer request**—Select the Work Order, and then click **Link to Request**. The system automatically populates **Work Order**, **WO Class**, **Work Order Org.**, **WO Priority**, and selects **Duplicate**.
   - **Generate a new work order**—Click **Create New WO**. The system creates the new work order and automatically populates **Work Order**.

16 Click **Save Record**.

---

**Adding remarks to the customer request**

To add remarks to the customer request:
1 Open the Call Center form.
2 Click New Record.
3 Remarks—Enter any remarks regarding the customer, work order, or request.
4 Copy to WO—Select to copy the remarks to the work order when you click Create WO.
   Note: If Copy to WO is unselected, the system saves remarks made to the customer request only.
5 Click Save Record.

Viewing bulletin board notices

To view bulletin board notices:
1 Open the Call Center form.
2 Click the Record View tab.
3 Click Expand/Collapse next to Bulletin Board.
4 Click Expand/Collapse next to the notices that have additional text to expand them. Notices with knowledge base articles have titles that are links to display the knowledge base articles.
5 View the bulletin board notice information.
System administrators can create user-defined screens that utilize the underlying web services on which the system is architected. See "Defining web service prompts" in the System Administrator's Guide. 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. See "Entering user defined fields" on page 50.

The following apply to screens based on web service prompts:
- They are standalone record view screens with no tabs and no Dataspy filtering features
- Common tabs and pop-ups (Comments, Documents, Addresses, etc.) are not available
- The only toolbar options available are Previous Screen, Save, Reset Screen, and Help
- Right-click options are not available
- Dataspy, Export to Excel, Quick Filter, and Save Layout options are not available
- The system does not automatically display the lookup defined on the selected screen for a chosen field. 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.

To execute web service prompts:

2. Associate the new web service prompt with a user group menu. See in the System Administrator's Guide.
3. Select a Web Service Prompt screen. The system displays the screen in insert mode, based on the underlying web service prompt field defined. The Web Service Prompt description displays as the screen name. The system automatically populates Field Label, Field Type, Display Type, Query Code, and Fixed Data.
   
   **Note**: Each web service defined for the prompt displays in its own section. Each section contains a header containing the name of the web service for which the section is based, i.e., AddWorkOrder, AddActivity, DeletePart.
   
   The system displays the prompt fields for each web service section header in ascending order by Sequence.

   If a Query Code is defined for the prompt field, the system displays a lookup button for the field.

   If the prompt field is Computed, the system uses the statement in Computed Data to populate the field value. These calculations are performed when the transaction is saved.

   If the prompt field is a checkbox, the system displays a checkbox next to the Field Label.

   If a Pattern Match is defined for a prompt field and you leave the field, the system ensures the value entered in the field matches the defined pattern.

   If Use Previous Value is checked for a prompt field and insert mode is entered, the system automatically populates field values from the previous record for any fields that have Use Previous Value checked on the web service prompt.

4. Enter values for the displayed prompt fields.
5. Click Save. The system submits the entered data 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

To execute a web service prompt containing an 'update' web service:

2. Associate the new web service prompt with a user group menu. See in the System Administrator's Guide.
3. Select a Web Service Prompt screen. The system displays the screen in insert mode, based on the underlying web service prompt field defined. The Web Service Prompt description displays 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. Enter the key field data. When you tab out of the last key field or click Save, the system uses the key field information 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

To execute a web service prompt containing a 'delete' web service:


2. Associate the new web service prompt with a user group menu. See in the System Administrator's Guide.

3. Select a Web Service Prompt screen. The system displays the screen in insert mode, based on the underlying web service prompt field defined. The Web Service Prompt description displays 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. Enter the key field data. When you tab out of the last key field or click Save, the system uses the key field information to identify the database record for deletion.

5. Click Save.
Web service prompt execution
Glossary

ABC analysis
An inventory method that enables you to divide your stock inventory items into three groups or classes: A, B, and C. ABC class assignments are used as selection criteria for a number of material management functions, such as EOQ calculations, stock replenishment, repairable spares, and physical inventory counts.

active layer
The layer of a GIS map in which a search originates.

additional charge
Added to pricing schedules in a multi-organization environment. Additional charges are added to every work order that is completed for a customer contract.

address alias
A name (usually more popular name) for an address or place.

archive
The process in which the system will remove data from the viewable screens and into tables for keeping.

asset
A sub-category of equipment. An asset is any physical object for which you want to store data and create work orders, e.g., a pump, a car, an air conditioning unit, etc.

budget
Tools used to track expenses and set spending limits for specified time periods or items. Budgets coordinate with existing inventory. They also can be defined for predetermined time frames such as months, quarters, or years.

Important parts of a budget include budget calendar types, groups, terms, and structures.

buffer layer
The layer of a GIS map in which equipment for which you are searching resides if your search involves multiple layers.

bulletin board
A database of information posted for the benefit of call center employees that lists company-related information, or any information that the call center employee needs to know immediately.

bulletin board notice
An internal notice in the Call Center module.

calibration
The process of comparing the performance of a piece of equipment to a known standard of accuracy.

campaign
A list of jobs that may be performed on a given list of equipment as necessary to complete work.

change notice
Used when specifying defective equipment from vendors, which the vendors replace without charge to the customer for a certain period of time. Change notices can be recorded in forms once they are issued from the vendor.

contract
Purchasing contracts are tools used to detail agreements for parts. Details include such information as suppliers, time-frames, and buyer facts as well as percentage discounts arranged for each contract according to order or duration.

customer charge
The costs calculated for all work performed for a customer contract. Customer charges include the costs of all labor,
parts, fixed charges, and all information specified on a pricing schedule.

**customer contract - work**

An electronic document/record created for commercial service (or asset management services) customers to specify how time, material, and labor costs are charged to a customer for maintenance work. A customer contract can include fixed charge schedules and pricing schedules for custom trade rates, part charges, additional charges, and the criteria by which the system will identify work orders for which to accumulate and bill charges when generating customer charges and invoices.

**maintenance pattern**

A schedule of predefined jobs used to perform a preventive maintenance cycle. A maintenance pattern tells how the system should generate work orders for the maintenance pattern, and whether the resulting PM work order generation is based primarily on a time interval (weekly, monthly, annually), or on a meter interval (ex. 3000 miles) or both.

**adjustment**

Corrections made to charges invoiced to a customer. Adjustments can be in the form of an extra charge for a damaged vehicle or a fee for equipment returned late.

**building maintenance program (BMP)**

One of many policies and procedure templates within Behavioral Health Environment of Care Manual written for the medical office, hospital, and other healthcare organizations. The policies cover: Joint Commission (JCAHO or TJC) • CMS • HIPAA • CDC • AAAHC and more.

**call center**

A place where a customer calls, emails, faxes, or walks in, with a request for information. Call Centers are staffed with employees who are trained to handle the requests that customers have.

**campaign event**

A survey of equipment or job to perform work on equipment.

**charge definition**

The specification of a type of charge and any adjustments to the charge that will be invoiced to a customer. The charges are defined on the customer and rental contracts.

**checklist**

The items listed are used to verify the progress or completion of tasks. The Checklist tab is on the Task, Work Order, and Permit to Work screens.

**clause**

A provision added to a customer contract and used on the customer contract definition.

**confined space**

Area determined as a confined space by OSHA regulations.

**contract item**

A piece of equipment, project, or work order. The Contract Items screen specifies the equipment, project, or, work order included on the customer contract. Also provided are details of the item including the organization that will invoice, contract template, recommended exchange rate, and associated customer.

**core part**

A part you plan to repair on internal repair work orders, or send to a supplier to repair on external repair requisitions. Often referred to as repairable core parts.

**customer contract**

An agreement with a customer detailing charge definitions, contract clauses, comments, and invoice data. The contract also lists a definition of the charges included and excluded, and applicable adjustments. Charges that can be invoiced are work order charges, sale of services, fuel charges, energy charges, and periodic or usage based lease or rental charges. A customer contract can involve a combination of multiple equipment, projects, and work orders.

**customer invoice**

Generated/created to compile and assemble accounts receivable invoices for asset management service customers, work order charges, and fixed payments.

**customer rental**

A contract created when a customer rents equipment. The rental price is listed on the contract and is based on usage or a one-time charge. Customer invoices can be generated from Customer Rental records. Only one piece of rental equipment can be listed on the contract.

**customer request**

Any need that the customer has and contacts the Call Center for help/results. There are three types of customer requests:
1. Action Request (work order)
2. Information Request
3. Commenting on a service or new product/program

**dataspy**
A predefined view of a list of records or set of data.

**decision tree**
Created for a reliability ranking to calculate a reliability ranking score. A decision tree is comprised of four levels which include a reliability ranking level and up to three sub-levels, answers, formulas, and normalization values.

**depreciation**
The reduction of the value of an asset as the result of wear and tear, age, or obsolescence.

**equipment**
Entities for which you store data and create work orders. "Equipment" is a generic, all-encompassing term for assets, positions, systems, and locations, which form a hierarchy of equipment information:
   1. Locations
   2. Systems
   3. Positions
For example, a motor, a line in a factory, a street, etc.

**fields to remember**
This tab refers to the fields and their values that the system will remember and display as the user moves from screen to screen.

**fixed charge**
Can be added to customer contracts to create a set price to be added to a customer invoice based upon a specified due date.

**GIS**
An acronym for Geographical Information Systems.

**hazard**
A biological, chemical, physical, mechanical, environmental agent or situation that threatens life, health, property, or the environment. In EAM hazards typically refer to workplace hazards or potential hazards employees may encounter based on their workplace operations such as falling when working at heights, drowning when welding under water, or electrocution when working with high voltage equipment.

**HIPAA confidentiality**
A federal regulation protecting patient health information and the equipment that safeguard this confidential information.

**incident request**
A record created when a hotel guest or employee contacts the front desk to report a problem or to get information. Work orders can then be generated from these requests when it is necessary to take action.

**isolation point**
Indicates at which areas the equipment can be isolated from its energy sources to prevent injury from unexpected startup. Equipment should be isolated from its energy sources during the lockout/tagout procedure of the permit to work process. Examples of isolation points are circuit breaker, valve, or equipment switch.

**kit**
A collection created from a stock of parts within a store. When a kit is built, component parts are removed from inventory and the kit itself is added to inventory. Kits are individually identified by a unique Lot number.

**knowledge base**
A database of information from which call center employees can search for needed information, to solve a customer's problem or request. Within a knowledge base there are articles, links to websites that offer more information, and directions for call center employees to follow.

**lockout box**
A physical location for employees to safely store all the keys used for a lockout/tagout procedure during which mechanical equipment is disconnected from electricity. The keys are safely stored and locked to prevent unexpected startup of the equipment while employees are performing maintenance. The unexpected startup of equipment while maintenance is performed could cause bodily injury or death to employees performing the work. The keys are safely stored and locked during this time to prevent such injuries or fatalities.

**lockout/tagout**
OSHA regulations on lockout/tagout procedures for equipment, which require that machines are properly shut down and that they are not restarted until service or maintenance on the machine is completed. Tagging and locking out (e.g., securing that mechanical equipment is disconnected from to electricity) while employees are performing required maintenance and work orders, prevents bodily injury and death by employees who might
otherwise startup equipment while maintenance is being performed.

**normalization value**

Acceptable value ranges for levels in the decision tree for which to determine equipment reliability rankings.

**objective**

A specific result that your organization plans to achieve. Objectives specify the expected results and expected result dates. For example, an objective can be to reduce electrical consumption by 10% in fiscal year 2014 at Greenville, SC plant.

**OEM site/system ID**

A site and/or system identification for service companies and original equipment manufacturer of an asset.

**permit to work**

Details the hazards and precautions required to remove or prevent a potential hazard to your employee's safety.

**policy**

Guidelines created by your organization to record a corporate or enterprise-wide initiative. For example, this enterprise is committed to reducing energy consumption and thereby reducing its carbon footprint.

**precaution**

A measurement your operation or employees can take to prevent workplace hazards which have the potential to cause bodily injury and even death. Examples of precautions include wearing a safety harness to prevent falling when working at heights, wearing proper equipment to prevent drowning, or switching off electricity to prevent electrocution.

**reliability ranking**

A method by which users assess equipment criticality or risk to overall production.

**reliability ranking index**

An index of a range of assigned values the system uses when a reliability ranking score has been calculated for equipment using the decision tree formulas.

**reliability ranking score**

The calculated score by which the system determines equipment criticality and reliability.

**reliability ranking survey**

A survey for selected equipment to calculate the Reliability Ranking Score and the Reliability Ranking Index (RRI).

The system calculates the Reliability Ranking Score using the formula of the reliability ranking levels and the answers entered on the reliability survey.

**sequence**

The chronological order of work to be completed on a maintenance pattern based on either a time or meter-based interval for releasing work orders.

**statement of conditions**

A statement of conditions on healthcare equipment as required by The Joint Commission to document that a fire safe environment of care and compliance is maintained.

**strategy**

Utilized to record a corporate or organizational strategic initiative such as the corporate commitment to reduce electrical consumption by an amount and a date. The strategy does not specify how this will be accomplished. For example, a strategy can be to reduce electrical consumption by 35% before fiscal year 2014. To accomplish the strategic initiative, the following can be done:

- Average 35% reduction across the enterprise.
- Minimum reduction of 25% per facility.

**target**

The focus of an objective or initiative.

**UMDNS code**

A code which identifies a healthcare asset in the Universal Medical Device Nomenclature System™ (UMDNS) which is a standard international nomenclature and computer coding system for medical devices.
Index

assets (continued)
unreliability chart 623
unreliability chart report 156
updating observed physical location 164
viewing capital planning requests for objectives 163
viewing objectives for strategies 161
viewing structure details for equipment 171
warranty claim vs. settlement chart report 624
work order repair costs chart 109, 625
assigning parts
purchasing contracts 788
assignment adjustments
creating for fleet bills 753
average monthly usage analysis report 657

B
balance
calculating double declining depreciation 134
batch work orders
adding comments 408
booking labor for work orders 407
issuing parts 427
returning parts 427
updating closing details for work orders 478
work order generation summary report 679
billing
fleet report 641
viewing details for fleet bills 750
bin lookup 46
bins
creating for stores 189
transferring parts between bins 218
blanket orders
clauses 337
creating partial orders from 338
details 333, 335
headers 333
purchase order terms 337
report of approved blanket orders 672
user authorizations 338
budgets
lower level reports 632
analysis report 630
assigning items to groups 781
calculating 783
consistency control reports 631
copying 784
defining 782
defining calendar types 779
defining details 783
defining groups 781
defining periods for terms 781
defining setup information 779
defining structures 779
defining terms 780
list of top level reports 632
position details report 630

C
calculating
depreciation 135
double declining balance depreciation 134
economic order quantity 217
calculation
customer charges 771
calculations
understanding depreciation methods and daily calculations 133
calendar groups
defining for equipment 799
calendar periods
defining for calendar groups 800
calibration
defining basic data 579
defining calibration standards 584
defining or importing test point data 581
defining test point data 579
entering results 582
understanding loops 578
understanding management 575
understanding terms 576
viewing loop instruments for a work order 584
viewing results 585
calibration analysis report 633
calibration due report 634
calibration equipment report 608
calibration history report 608
calibration record report 635
calibration reverse traceability report 636
calibrations reports 633
call center
action requests 793
adding remarks to customer requests 812
associating equipment with contact information 795
associating GIS map layers with service problem codes 796
comments 794
creating a service delivery matrix for equipment 798
creating bulletin board notices 801
creating department structures 798
creating knowledge base articles 800
creating providers 797
call center (continued)
creating service categories 798
creating service problem codes 795
defining calendar groups for equipment 799
defining calendar periods for calendar groups 800
defining event log type filters 802
defining usability codes for equipment 806
defining departmental hierarchies 793
entering contact information 794
entering customer information 808
entering customer requests 807
information requests 793
performing a customer search 807
performing a knowledge base search 809
processing an action request 811
reports 637
selecting GIS attributes for call center setup 806
selecting options for the call center form 802, 803
setting up 794
terms 791
understanding 792
viewing additional information 808
viewing associated service delivery matrixes and knowledge base articles 801
viewing bulletin board notices 813
viewing my favorites from the knowledge base search 811
viewing my recent search articles 810
viewing the event log 809
viewing the results of the knowledge base search 810
viewing the results summary of the knowledge base search 810
viewing the top 10 knowledge base articles 811
work order report 680
caller records 489
editing existing 490
campaigns
adding equipment 598
adding events 597
copying 600
creating 596
creating work orders 599
managing equipment 598
marking equipment 599
viewing work orders 600
capital performance
evaluation report 609
capital performance evaluation hospital report 648
capital planning requests
creating 440
viewing for objectives 163
catalog
creating for supplier 207
parts 197
suppliers 208
change notices
adding lines 141, 142
defining 141
defining locations 142
viewing assets 142
charge definitions
viewing for customer rental contracts 541
charges
creating custom parts 769
charts
project summary report 601, 671
viewing from Start Center 71
check boxes 46
checklist
viewing and entering for permits to work 551
checklists
adding to tasks 376
import from tasks 377
viewing for work orders 412
child work orders
adding to parent work orders 428
claims
warranty reports 624
classes
closing codes 79
clauses
associating with customer contracts 533
defining 318
defining children 318
defining for contract classes 789
closing codes
associating with classes 78, 79
defining 78
defining hierarchies 79
CO2 analysis report 610
CO2 emissions hospitality report 648
CO2 emissions report 610
code levels 486
codes
aspect 558
condition 560
finding 560
inspection management 558
modifying part codes 202
point type 559
shutdown 588
columns
resizing 56
comments
adding 60
entering 60
field 46
modifying 61
viewing audits 62
commodities
associating with suppliers 211
customer contracts 532
recording fuel mixes 211
commodity codes 173
condition codes
  equipment 565
conditions
  adding to part condition templates 269
  changing conditions for parts 270
consignment activity report 657
contact information
  associating equipment in call center 795
  entering in call center 794
contacts
  suppliers 207
contract classes report 639
contract items
  invoices 542
contract reports 639
contracts
  customers 771
    defining clauses 789
    defining order discounts for purchasing contracts 789
    defining part discounts 788
    purchasing 787
  copy record button 41
  core tracked parts 200
    adding to work orders 418
    auto-assignment processes 198
    creating external repair details 200
    creating internal repair details 198
    creating repair details 198
    creating return requisition 284
    manually assigning repair details 235, 419
    viewing unreturned 423, 543
  cost of WOs per equipment report 611
  cost summary by project and area report 668
  cost summary by transaction date report 680
  costs
    viewing work orders 434
    WO list report 703
    WO list-hospitality report 653
    WO summary graph reports 703
    WO summary report 627
    WO summary-hospitality report 654
  creating
    in ESRI 718
  credit cards
    defining 320
    users 320
  crews
    adding employees 371
    defining 371
  critical values
    definition 555
  currency
    defining 174
    exchange rates 174
  custom fields 50
    viewing for equipment from work orders 438
  custom trade rates
    creating 768
  customer charges
    understanding calculation 771
    viewing 774
  customer contracts 528
    associating adjustments 537
    associating clauses 533
    associating clauses with templates 524
    associating commodities 532
    associating discount charges 530
    associating discounts with templates 527
    associating sales prices with templates 524
    copying records 538
    copying templates 527
    creating 765
    creating fixed charge schedules 766
    defining adjustments 522
    defining charges 533
    defining charges for templates 525
    defining contract items 529
    defining rental contracts 539
    defining sales prices 532
    defining templates 523
    defining work order criteria 531
    invoice generation errors 543
    viewing 771
    viewing and modifying invoice details 542
    work order criteria for templates 523
  customer information 484
  customer invoices 542
    creating and generating 774
    creating from work orders 775
      details 542
    generating 776
    generation errors 543
    understanding generation 775
    viewing 542
    viewing an overview of invoice lines 778
    viewing and changing the status 777
    viewing form 778
  customer invoices form
    creating for work orders 777
  customer rentals 539
    associating adjustments 540
    defining adjustments 522
    viewing charge definitions 541
  customer requests
    chart 681
    viewing work orders 486
  customers
    adding remarks to requests in call center 812
    approving and generating customer charges 772
    calculating and approving charges 771
    creating 484
    creating callers 485
    customer request report 637
    defining suppliers 205
customers (continued)
entering information 808
entering requests 807
performing a search in call center 807
processing action requests in call center 811
processing requests in call center 806
service problem codes in call center 795
viewing invoices 770
viewing the event log 809

daily WO scheduling
modifying labor schedules for work order activities 520
daily work orders
scheduling 514
Dataspy 65
hiding from user groups 70
sorting criteria 68
specifying advanced criteria 70
specifying criteria 67
specifying filter criteria 67
specifying layout criteria 69
dates
entering 47
entering via calendar 47
entering via keyboard shortcuts 48
dates and times
entering via calendar 47, 48
deferred maintenance
adding parts 509
creating 508
understanding 507
defining trade rates for employees 365
delete record button 41
departments
associating tools 81
creating structures 798
defining codes 80
depots
creating 503
viewing associated tanks for fuel 507
depreciation
book values 135
calculating book values 137
calculating double declining balance depreciation 134
calculating straight line depreciation 133
calculating sum of years digit 133
calculating units of output depreciation 134
entering data 137
periodic 135
tracking asset depreciation 132
understanding depreciation methods and daily calculations 133
units of output 140
viewing data 139
description
translations 63
design consumption
understanding effective and expiration date calculations 143, 145
details
adding services 328, 336
discounts
associating customer contracts 530
documents
associating forms 58
uploading 60
viewing and modifying associations 297
donc-drop-down lists 46

economic order quantity
calculating 217
emissions
CO2 hospitality report 648
CO2 report 610
employees
adding to crews 371
associating qualifications with employee codes 367
associating types 368
booking labor 406
daily hours worked report 682
defining codes 363
defining information 363
defining trade rates 365
recording labor availability 366
scheduling for PM work packages 455
transferring between organizations 368
viewing outstanding issues 369
WO on-time delivery report 704
energy consumption for equipment
designing 143
entering 146
energy star
ratings chart 149
Energy Star
annual energy reduction comparison report 606
ratings chart 612
setting up 148
understanding 147
viewing messages 149
viewing ratings 148
EOQ
calculating 217
EPAK button 41
equipment
adding safety data 165
adding to campaigns 598
adding to PM plans 502
annual energy reduction comparison report 606
asset failures by service life report 607
associating permits 119
Index

equipment (continued)
associating warranties 115
associating with contact information in call center 794, 795
batch reliability surveys 155
batch updates for reliability ranking values 154
book values 137
calculating units of output depreciation 134
calibration report 608
categories 78
CO2e emissions by greenhouse gas report 611
copying reliability ranking values in a batch 155
copying reliability rankings 155
costs, viewing 168, 169
creating facilities 158
creating reliability rankings 150
creating rooms 156
creating service delivery matrixes 798
creating vehicles 159
creating work order 109
decision tree for reliability rankings 150
defining assets 85
defining calendar groups 799
defining for PM work packages 454
defining hierarchies 106
defining isolation points 546
defining usability codes in call center 806
defining using profiles 84, 97
defining VMRS codes 380
defining VMRS details 97
definitions 77
depreciation report 613
Energy Star 147
Energy Star messages 149
Energy Star ratings 148
Energy Star setup 148
hazard chart 617
hazard chart report 156
hierarchies, viewing 107
hierarchy reports 613
history report 614
importing lockout/tagout details from equipment 167
initial information 78
inspection information 565
list details healthcare report 644
lookup 49
maintenance patterns 512
managing for campaigns 598
marking for campaigns 599
material usage, viewing 168, 170
performance by cost chart report 614
performance by downtime chart report 615
PM completion report for life support equipment 646
PM work order repair costs chart 110, 620
print reliability survey report 621
probability density chart report 156
profile report 683
profiles 83
equipment (continued)
purchase orders, viewing 168, 170
ranks for reliability rankings 153
reliability calculations report 156, 622
reliability chart 622
reorganizing hierarchies 106
returning parts 259
safety review required report 697
setting up warranties 81
straight line depreciation 133
toggling cost rollup 108
transfer log report 615
transfer, understand 123
transferring 124
understanding reliability rankings 150
unlinking 107
unreliability chart 623
unreliability chart report 156
viewing all work orders per equipment 168
viewing for reliability rankings 153
viewing parent of a location 108
viewing parents 108
viewing structure details for equipment 171
WO cost report 626
work order repair costs chart 109, 625
equipment configuration
adding calendar-based warranty coverage 129
adding usage-based warranty coverage 129
associating child equipment 127
creating 124
defining logical meters 128
generating equipment 130
viewing equipment configuration hierarchies 128
equipment depreciation report 613
equipment generation
defining equipment details 131
previewing equipment generation 131
equipment hierarchies 106
report 613
equipment history report 614
equipment inspection aspects
defining 562
equipment list details healthcare report 644
equipment lookup 46, 48, 49
equipment transfer log report 615
eRecords
tooling 63
evaluation
capital performance hospitality report 648
capital performance report 609
events
adding to campaigns 597
defining log type filters in call center 802
viewing for Inf EAM and ESRI 721
viewing logs for permits to work 552
viewing the call center log 809
exceptions
labor availability 365
expired warranties report 684
extreme values 555

F
facilities
creating for hospitality 158
fault trend analysis report 616
fields
entering information 45
hidden 45, 46
updating 45
finding codes
classes 560, 561
definition 555
fleet billing report 641
fleet management
associating billing exceptions with vehicle tickets 749
billing process 746
creating assignment adjustments for fleet bills 753
creating pool and loaner adjustments for fleet bills 752
creating vehicle tickets 747
modifying fleet bills 750
understanding motor pool management 746
understanding terms 743
viewing billing adjustments for vehicle tickets 749
viewing billing details for fleet bills 750
viewing fleet bill adjustment transactions 751
viewing fleet bill transactions 751
viewing fleet bills 750
fleet reports 641
fleet work orders
booking labor automatically 414
formulas
associating parameters 572
forecasting
PMs 460
formula parameters
editing 573
formulas
defining 571
fuel
issuing 505
fuel management 504, 505, 506, 507
creating fuel 503
depots 503
managing 503
pumps for depots 504
tank volumes 506
future maintenance cost report 684

generating
work orders 464
generation errors 543
GIS
adjusting the range of linear equipment 732
associating comments 720
associating departments to maps 741
associating users to maps 741
attributes 710, 712
copying labor schedules 735
copying maps 741
creating 732
creating filters 731
creating maps 740
creating multiple equipment work orders 733
creating work orders (Infor EAM) 733
creating work orders in ESRI 718
data filter 715
defining activities 719
defining equipment for existing features: Infor EAM toolbar 709
defining equipment in ESRI 709
defining linear reference details 720
defining map parameters 740
entering custom fields 720
equipment with features 710
features with equipment 710, 711
features within Infor EAM 710
identifying features 730
linking Infor EAM equipment 707
locating equipment 737
locating work orders 737
map search toolbar 725
performing a basic map search (Infor EAM) 722
performing a map search 721
performing an advanced map search (Infor EAM) 724
processing rules for defining equipment records within ESRI 707
processing rules for defining GIS features within Infor EAM 709
routes 736
running 715, 717
saving 716
scheduling 734
selecting features 729
specifying attributes for call center 806
synchronizing attribute details (ESRI) 713
viewing Analytics data 737
viewing child equipment 738
viewing GIS maps from equipment records (Infor EAM) 738
viewing GIS maps from work orders (Infor EAM) 739
viewing Infor EAM events 718, 721
viewing maps (Infor EAM) 738
viewing nearest address 731
viewing results 717

Index | 829
Index

GIS map layers
  associating with service problem codes 796
GIS maps
  copying 741
  goods received note report 657
  goods return note report 658
granting
  purchasing authorization permissions for projects 592

H

hazards
  adding to permit to work 549
  adding to standard work orders 388
  adding to work orders 432
  associating precautions 545
  defining 197, 544
  defining lockout boxes for permits 547
  defining permits to work 548
  defining permits to work setup 543
  setting up revision control 482
  viewing usage 545

header
  help 40
  logout 40
  my account 40
  start center 40

healthcare
  defining assets 98
  defining properties 100
  defining systems 103
  equipment list details report 644
  labor productivity report 645
  medical equipment work orders by criticality 645
  print work orders report 643, 651
  reports 643

help button 41

hidden fields 46

hierarchies
  equipment reorganizing 106
  viewing equipment hierarchies with the equipment lookup 49

history
  calibration report 608

hospitality
  actual labor hours against estimated 647
  annual energy use report 647
  capital performance evaluation 648
  CO2 emissions report 648
  creating facilities 158
  creating incident requests 382
  creating rooms 156
  creating vehicles 159
  degree day analysis report 649
  GAS index analysis report 650

hospitality (continued)
  heating and cooling degree days vs. energy consumption type analysis 650
  heating and cooling degree days vs. energy costs analysis 651
  incident response time chart report 652
  incident summary chart report 652
  reports 647
  WO backlog report 653
  WO cost list 653
  WO cost summary report 654
  hours needed for tasks report 685

I

inboxes
  viewing from Start Center 71

incident
  response time chart report 652

incident requests
  hospitality 382

incident summary
  hospitality report 652

information
  requests call center 793

information requests
  creating 497
  inspection aspects 555
  codes 558
  defining properties 558
  inspection methods
    codes 559
    definition 555
  inspection point conditions
    definition 555
  inspection point types 555
  inspection points
    approving results 571
    comments 568, 570
    custom fields 570
    definition 555
    work orders 567, 568
  inspection reports 654
  inspection results 566
  inspection route report 655
  inspection routes
    defining 567
    for work order, definition 555
    templates, definition 555
  inspection units, definition 555

inspections
  custom fields 568, 570
  defining formulas 571
  relating to work orders 567, 568
  viewing and modifying for parts 300
  viewing instructions 301

instructions
  adding for tasks 373
instructions (continued)
viewing for part inspections 301
inventory
refreshing existing physical inventory data 293
inventory results
adding assets to lists 164
approving sessions 165
canceling sessions 165
creating work orders for assets 165
defining parameters 165
updating observed physical location 164
inventory standard report 658
inventory valuation
LIFO/FIFO 180
understanding time-based 180
invoice allocations
booking 345
invoice vouchers
adding items 342
adjusting charges 342
creating costs 343
creating regular 339, 340
defining utility bills 343
recording 339
viewing line items 345
invoices
booking allocations 345
details report 681
short customer report 700
viewing 770
viewing and modifying details 542
viewing customer lines 778
viewing for customers 542
iProcure
adding items to requisitions 314
associating Infor EAM suppliers with vendors 313
associating items to parts 313
creating Infor EAM suppliers 313
creating vendors 312
managing items in Infor EAM 312
updating items 314
viewing sync errors 315
viewing tracking for purchase orders 331
iProcure part items
adding to purchase orders 326
isolation points
defining for equipment 546
setting up revision control 483
viewing permits to work 547
issuing and returning parts
to work orders in a batch 427

K
key performance indicators 73
keyboard shortcuts 43
screen designer 44
screen-level 43
keyboard shortcuts (continued)
system 43
kits
breaking up 272
building kits 271
defining templates for parts 270
list of expired report 659
print build kit list report 663
print restock list report 663
reports 660
templates list report 659
knowledge base
performing a search in call center 809
knowledge base articles
creating in call center 800
viewing associated service delivery matrixes 801
knowledge base articles report 637
knowledge base search
viewing favorites 811
viewing recent searches 810
viewing the results 810
viewing top 10 articles 811
KPIs
accessing screens from the Start Center 74
adding 74
modifying the sequence 74
setting up 73
setting up the Start Center 73
viewing from Start Center 71

L
labor
booked by activity report 679
booking automatically for fleet work orders 414
booking for employee 406
booking for purchase orders 439
calculating availability 469
daily hours worked per employee report 682
recording employee availability 366
required per day or trade report 685
labor hours
actual against estimated (hospitality) report 647
actual against estimated report 678
labor productivity healthcare report 645
labor utilization
viewing 470
LIFO/FIFO
viewing stock values for parts 304
linear equipment
adding references 110
defining 96
references 110
searching for references 111
linear equipment range
adjusting 732
lines
adding parts 226
Index

list layout
  saving 52, 57
list of all PM schedules report 686
list of categories per class report 617
list of classes report 617
list of debit discounts report 639
list of equipment details report 618
list of equipment report 618
list of existing contracts report 640
list of inspection results 655
list of invoices report 672
list of outstanding requisition items report 660
list of permit issues report 686
list of points to be inspected 656
list of purchases under report 640
list of stock report 661
list of WO for project report 668
list of work orders report 687
list of WOs bypassed due to nesting report 687
lists 52
  columns 56
  filters 52
  selecting rows 52
  sorting 56
locations
  defining for change notices 142
  defining locations 84, 95
  viewing structure details for equipment 171
locations, definition 77
lockout/tagout
  defining details for equipment 166
  defining lockout boxes 547
  implementing for permit to work 550
  importing details from equipment 167
  importing details from permits to work 168
log in 39
log out 39
logical meters
  defining 112, 113
long term WO list report 688
lookup
  fields 46
  lookup values
    user defined fields 50
lookup
  filters 54
loops
  understanding and calibration 578
lots
  defining 175

M

maintenance costs
  future maintenance costs report 684
maintenance pattern
  viewing work orders 513
maintenance patterns
  activating for equipment 513
  adding equipment 512
  adding sequences 510
  copying 514
  creating 510
  deactivating for equipment 513
  managing equipment 511
  print maintenance pattern record report 621
managing
  iProcure items in Infor EAM 312
manufacturer
  associating with parts 204
  defining 203
manufacturers
  associating with parts 194
  defining lots 175
  viewing associated parts 309
maps
  associating users to GIS maps 741
  creating for GIS 740
  defining GIS parameters 740
  GIS departments 741
  viewing GIS maps (Infor EAM) 738
  viewing GIS maps from equipment records (Infor EAM) 738
  Viewing GIS maps from work orders (Infor EAM) 739
material lists 379
material requirements analysis report 688
materials
  copying lists 380
materials management
  creating and managing parts information 190
  pick tickets 289
  requisitions 224
  returning 251, 266
  setting up initial information 173
  stock 212
  suppliers 204
  viewing and modifying information 296
materials reports 656
mean time between failures per equipment report 619
mean time between failures report 619
measuring units 179
menu bar 40, 41
message bar 40, 43
meter based PM due report 689
meter history report 620
meter readings
  deleting 112, 114
  entering in a batch 428
meters
  definition 112
  equipment-linked readings 112, 114
  viewing history 112, 114
modifying
  fleet bills 750
monitored data
viewing 561
monthly scheduling details report 689
monthly usage trends report 661
MS Project
associating priority codes 757
canceling sessions 763
creating a work order activity and adding it to an existing scheduling session 760, 761
creating a work order and adding it to an existing scheduling session 760
creating scheduling sessions 757
exporting sessions 762
importing sessions 759
importing work orders 762
installing 755
setting up connection information 756
multiple equipment work orders
adding equipment 398
GIS 733
multiple parts
purchase orders 325

N
navigation 40
new record button 41
next record button 41
next screen button 41
nominal values 555

O
objectives 161
 defining energy targets 162
 viewing capital planning requests 163
 viewing strategies 161
operators
quick filter 52, 54
options
user defined fields 50, 51, 52
organizations
transferring employees 368
outstanding issues
employees 369
outstanding parts
unreturned core parts 423, 543

P
packing slips
 recording information for PO receipts 242
 retrieving outstanding PO lines 243
parameters
associating formulas 572
deleting saved 606
part condition templates
 defining 269
part failures
 manually adding to work orders 420
part failures report 690
part numbers 202
 viewing history 203
part reservations
 viewing 187
part stockouts report 662
parts
 adding store-to-store receipts 283
 adding to a supplier return 268
 adding to deferred maintenance 509
 adding to non-purchase order receipts 249
 adding to work orders 415
 assigning to purchasing contracts 788
 associating 64
 associating manufacturers 194, 204
 associating stores with parts 212
 associating suppliers 195
 breaking up kits 272
 building kits 271
 changing conditions 270
 creating 190
 creating a pick ticket 422
 creating internal repair receipt headers 286
 creating pick tickets 289
 creating requisitions 229, 423
 creating store-to-store issue headers 278
 defining discounts for purchasing contracts 788
 defining kit templates 270
 defining multiple prices 193
 defining reasons for returns 179
 defining substitute parts 201
 defining tax rates 177
 entering stock information 215
 expired parts kits report 659
 from a stock record 265, 266
 from multiple equipment work orders 251, 262
 from stores 251, 254
 importing a parts list for a pick ticket 290
 internal repair receipts 287
 issuing and returning 424
 issuing and returning to work orders in a batch 427
 list of kits report 660
 managing stock information 212
 manually creating for requisitions 229
 modifying codes 202
 non-purchase order receipts 249
 pick tickets 290
 pick tickets to an issue/return 258
 print kit restock list report 663
 receiving 241
 recording packing slips 241, 242
 recording stockouts 217
 reserving for work orders 421
 returning from service requests 494
Index

parts (continued)
- returning from work orders, equipment, or projects 259
- revaluing multiple prices of parts (MOS) 296
- safety review required report 697
- scrapping 201
- selecting substitutes 231
- store-to-store issues 279
to suppliers 251, 266
- transferring between bins 218
- transferring without requisitions 219
- updating iProcure items 314
- viewing and modifying associated stores 298
- viewing and modifying information 296
- viewing and modifying inspections 300
- viewing and modifying multiple prices of parts (MOS) 299
- viewing and modifying stock information 299
- viewing associated manufacturers 309
- viewing associated suppliers 309
- viewing details 302
- viewing history for part numbers 203
- viewing instructions for inspections 301
- viewing processed lines for PO Receipts 247
- viewing purchase order history 303
- viewing purchase orders 303
- viewing purchasing contracts 303
- viewing reservations 308
- viewing reservations for stores 189, 203
- viewing stock in-transit 307
- viewing stock levels 302
- viewing stock transactions 305
- viewing stock values for LIFO/FIFO parts 304
- viewing usage and demand 301
- viewing when and where usage 304
- parts currently reserved/allocated report 662
- passwords
  - changing 75
  - entering 39
- penalty deduction detail report 638
- penalty deduction summary report 638
- permit body comments
  - deleting 359
  - modifying 359
- permit to work
  - report 693
  - adding safety hazards and precautions 549
  - associating precautions with hazards 545
  - copying and replacing 552
  - defining 548
  - defining hazards 544
  - defining isolation points 546
  - defining lockout boxes 547
  - defining lockout/tagout details for equipment 166
  - defining precautions 545
  - defining setup 543
  - importing lockout/tagout details for equipment 168
- permit to work (continued)
  - importing lockout/tagout details from equipment 167
  - lockout/tagout procedures 550
  - resolving conflicts 551
  - understanding and managing 543
  - viewing and entering checklist items 551
  - viewing event logs 552
  - viewing for isolation points 547
  - viewing hazard usage 545
- permits
  - adding body comments 359
  - adding to work orders 429
  - associating with equipment 119
  - associating with standard work orders 387
  - defining 358
  - setting up revision control 483
- permits for WOs report 690
- permits to work
  - safety review required report 697
- personnel
  - shifts 369, 370
- physical inventory 291
  - discrepancy report 662
  - entering quantities 293
  - performing 291
- physical meters
  - defining 112
- pick tickets
  - adding parts 289, 290
  - creating 422
  - defining headers 289
- PM
  - work packages 453
- PM forecasting
  - defining equipment parameters 455, 458
  - options 461
  - report 691
  - understanding 457
  - viewing resource load 463
- PM plans
  - copying 498
  - creating 498
  - creating activities for PM schedules on PM plans 500
  - creating headers 498
  - moving activities 501
- PM schedules 120
  - adding safety hazards and precautions 451
  - associating with PM plans 499
  - profile report 691
  - report 686
  - safety review required report 697
  - viewing work orders 450
- PM work orders
  - compliance report 691
  - creating 441
  - viewing comments for PM work order activities 450
PM work packages
  defining equipment 454
  scheduling employees 455
  understanding 453
PMs
  approving revisions 481
  copying 498
  defining 443, 446, 447
  delinquent summary report 683
  forecasting 460
  performing revision control 480
  releasing 452
  requesting tools for work orders 451
  revision control 481
  routes 442
PO cost summary report 674
PO status report 675
point type codes
  equipment 561, 562
points
  defining 561
policies 160
  viewing strategies 160
POs awaiting invoicing report 676
positions
  defining 89
  defining positions 84
  energy star ratings chart report 149
  Energy Star ratings chart report 612
  hazard chart 617
  hazard chart report 156
  probability density chart report 156
  reliability calculations report 156, 622
  reliability chart 622
  unreliability chart 623
  viewing structure details for equipment 171
precautions
  adding to permit to work 549
  adding to PM schedules 451
  adding to standard work orders 388
  adding to work orders 432
  associating with hazards 545
  defining 197, 545
  setting up revision control 483
previous record button 41
previous screen button 41
prices
  common parts 193
pricing schedules
  creating 767
pricing schedules form
  adding additional charges 769
  defining work order criteria 770
pricing variance report 673
print contract report 640
print customer charges report 628
print customer contract report 629, 692
print invoice report 629
print physical inventory list report 664
print pick ticket report 664
print PO report 673
print preview button 41
print purchase requisition report 665
print record button 41
print short WO cards report 693
print work order report 695
profiles
  creating 83
project
  basics 588
  defining basics 589
project budget code cost summary report 669
project cost breakdown report 669
project cost summary report 670
Project POs report 670
project reports 668
projects
  budgets 590, 593
  creating new work orders 593
  default budgets 591
  define budget codes 587
  defining budget codes 587
  defining parent and child projects 589
  generating shutdown 594
  granting purchasing authorization permissions 592
  new work orders 593
  returning parts 259
  summary chart report 601, 671
  viewing associated work orders 595
  viewing cost summaries 596
  viewing hierarchy 593
  viewing purchase orders 595
properties
  associating with customers 485
  associating with employees 486
  defining for healthcare 100
property information 487
providers
  creating in call center 797
pumps
  associating to tanks and fuel for depots 505
  depots 504
purchase history per item/supplier report 665
purchase history per PO/supplier report 674
purchase orders
  adding 322
  adding requisitioned parts 239, 240
  associating assets 327
  awaiting delivery report 671
  blanket orders 333
  booking labor 439
  clauses 330
  copying 330
  creating 321, 324
  creating and revising 320
  creating non-purchase order receipts 242, 249
purchasing
  - adding iProcure part items to purchase orders 326
  - defining children for clauses 318
  - defining clauses 318
  - defining clauses for contract classes 789
  - defining contracts 787
  - defining order discounts 789
  - updating iProcure items 326
  - vendor lead time report 678
  - viewing clause hierarchies 319
purchasing management
  - defining contract text 790
  - defining initial information 317
  - recording invoice vouchers 339
  - regular 339
purchasing reports 671

Q
qualification expiration report 696
qualification requirement report 697
qualifications
  - associating qualifications with employee codes 367
  - associating with tasks 376
  - associating with trades 361, 362
  - associating with work orders 401
  - defining 360
  - importing unlinked 401
queries
  - copying 66
  - creating 66
  - deleting 67
  - editing 65
  - specifying advanced criteria 70
quotation summary report 676
quotations
  - defining parts price information 356
  - defining services price information 355
  - editing 354

R
radio buttons 46
rates
  - defining for suppliers 210
  - defining trade 361
  - reasons for return defining 179
  - receipt
    - store-to-store 284
  - receipts
    - creating for internal repairs 286
    - creating internal repair 286
    - creating store-to-store 281
  - record count
    - displaying 58
    - recording invoice vouchers 339
  - records
    - adding documents 58
    - copying 57
    - exporting 58
    - uploading documents 60
  - reliability rankings
    - adding answers 150
    - adding formulas 150
    - adding levels 150
    - adding normalization values 150
    - assigning ranking index 153
    - completing surveys in a batch 155
    - completing the survey 153
    - copying 155
    - copying ranking values to equipment in a batch 155
    - creating decision tree 150
    - creating for equipment 150
    - equipment
      - completing reliability ranking survey 153
      - ordering questions 150
      - print reliability survey report 621
      - understanding 150
      - update values in a batch 154
      - viewing equipment 153
  - remarks
    - adding to customer requests in call center 812
  - repairable core parts
    - generating work orders 467
  - repairable parts
    - scrapping 201
  - repairable spare parts
    - creating internal receipts 286
    - creating receipt headers 286
  - reports
    - actual labor hours against estimated 678
    - actual labor hours against estimated (hospitality) 647
    - annual energy reduction comparison 606
    - annual energy use 607
    - annual energy use (hospitality) 647
    - approved POs awaiting delivery 671
    - asset failures by service life 607
    - asset management services 628
    - assets 606
    - average monthly usage analysis 657
    - batch work order generation summary 679
reports (continued)
blanket order list 672
booked labor by activity 679
budget 630
budget analysis 630
budget structure codes list 632
budget summary 631
budgets consistency control 631
calibration analysis 633
calibration due 634
calibration equipment 608
calibration history 608
calibration record 635
calibration reports 633
calibration reverse traceability 636
call center reports 637
call center work order 680
capital performance evaluation 609
capital performance hospitality evaluation 648
CO2 analysis 610
CO2 emissions 610
CO2 emissions hospitality 648
CO2e emissions by greenhouse gas report 611
consignment activity 657
contract classes 639
cost of WOs per equipment report 611
cost summary by project and area report 668
cost summary by transaction date report 680
customer invoice details 681
customer request 637
customer request chart 681
daily hours worked per employee 682
daily trade schedules 682
degree day hospitality analysis 649
deleting saved report parameters 606
delinquent PM summary 683
downtime tracking 612
ergy star ratings chart 149
Energy Star ratings chart 612
equipment depreciation 613
equipment hierarchies 613
equipment history 614
equipment list details healthcare 644
equipment performance by cost chart 614
equipment performance by downtime chart 615
equipment profile 683
equipment transfer log 615
expired warranties 684
fault trend analysis 616
fleet 641
fleet billing 641
future maintenance costs 684
GAS index analysis 616
GAS index hospitality analysis 650
generating 603
goods received note 657
goods return note 658
hazard chart 617
reports (continued)
healthcare 643
healthcare work orders 643, 651
heating and cooling degree days vs. energy consumption type hospitality analysis 650
heating and cooling degree days vs. energy costs hospitality analysis 651
hospitality 647
hours needed for tasks 685
incident response time chart 652
incident summary chart 652
inspection 654
inspection routes 655
inventory standards 658
kit templates list 659
knowledge base articles 637
labor productivity healthcare 645
labor required per day or trade 685
list of all PM schedules 686
list of budgets (lower level) 632
list of budgets (top level) 632
list of categories per class 617
list of classes 617
list of debit discounts 639
list of equipment 618
list of equipment details 618
list of existing contracts 640
list of expired kits 659
list of inspection results 655
list of invoices 672
list of outstanding requisition items 660
list of part kits 660
list of permit issues 686
list of points to be inspected 656
list of purchases under contract 640
list of stock 661
list of WO for project 668
list of work orders 687
list of WOs bypassed due to nesting 687
long term WO list 688
material requirements analysis 688
materials 656
mean time between failures 619
mean time between failures per equipment 619
medical equipment work orders by criticality 645
meter based PM due 689
meter history 620
monthly scheduling details 689
monthly usage trends 661
part failures 690
part stockouts 662
parts currently reserved/allocated 662
penalty deduction detail 638
penalty deduction summary 638
permits for WOs 690
physical inventory discrepancy 662
PM completion for life support equipment 646
PM compliance 691
Index

reports (continued)
PM forecasting 691
PM schedule profile 691
PM work order repair costs 110, 620
PO cost summary 674
PO status 675
POs awaiting invoicing 676
pricing variance 673
print build kit list 663
print contract 640
print customer charges 628
print customer contract 629, 692
print invoice 629
print kit restock list 663
print maintenance pattern record report 621
print permit to work 693
print physical inventory list 664
print pick tickets 664
print PO 673
print reliability survey report 621
print requisition 665
print short WO cards 693
print work orders 695
project 668
project budget code cost summary 669
project cost breakdown 669
project cost summary 670
project POs 670
project summary chart 601, 671
proof of delivery 696
purchase history per item/supplier 665
purchase history per PO/supplier 674
purchasing 671
qualification expiration 696
qualification requirement 697
quotation summary 676
reliability calculations report 156, 622
reliability chart 622
request discount based on purchases 641
request for quotation 677
requests
creating information requests 497
customer chart report 681
entering for customers 807
information call center 793
requests for quotations
associating parts 348
calculating costs 346, 348
copying 354
creating parts 349
defining 346
defining clauses 348
defining services 353
defining suppliers 353
generating POs 352
generating requisitions 351
selecting items 350
selecting multiple parts 350
selecting substitute parts 350
updating a supplier catalog 351
requisitions
adding parts to store-to-store 274, 276
approving 236, 237

stock issues history by part 666
stock transactions 667
stock value listing by part type 667
table of equipment with custom fields 622
tool usage 702
total annual energy use 623
unreliability chart 623
vehicle ticket 642
vendor lead time 678
VMRS activities 643
warranty claim vs. settlement chart 624
warranty claims 624
weekly booked hours by department 625
WO aging 703
WO backlog 702
WO backlog-hospitality 653
WO cost by equipment 626
WO cost by type, cost code, or dept 626
WO cost list 703
WO cost list-hospitality 653
WO cost of equipment per location 627
WO cost summary 627
WO cost summary graph 703
WO cost summary-hospitality 654
WO on-time delivery by employee 704
WO on-time delivery by trade 705
WO statistics 705
work 678
work by employee 706
work order list-detail 646
work order repair costs 109, 625
request discount based on purchases report 641
request for quotation report 677
request for quotation summary report 677
requests
creating information requests 497
customer chart report 681
entering for customers 807
information call center 793
requests for quotations
associating parts 348
calculating costs 346, 348
copying 354
creating parts 349
defining 346
defining clauses 348
defining services 353
defining suppliers 353
generating POs 352
generating requisitions 351
selecting items 350
selecting multiple parts 350
selecting substitute parts 350
updating a supplier catalog 351
requisitions
adding parts to store-to-store 274, 276
approving 236, 237
requisitions (continued)
copying 234
creating for parts 422, 423
creating store-to-store 274
creating store-to-store requisition headers 274
creating work orders and activities on the Services page 234
generating 221
headers 224, 225
manually adding parts 226, 229
rejecting 236, 237
selecting substitute parts 226, 231
services 231
transferring parts 219
viewing for parts 303
viewing transactions 236
reservations
viewing for parts 308
reset screen button 41
resource load graph 697
result type, definition 555
retrieving saved report parameters 605
return summary report 666
returns
defining reasons 179
revision control
approving parent PMs 481
approving revisions 481
defining approval lists 480
defining approvers for approval lists 480
hazards 482
isolation points 483
performing 480
permits 483
PM work orders 482
precautions 483
rejecting 481
viewing approval history 482
viewing approvers 481
RFQ service
retrieving WO services 353, 354
RFQs 348
requisitions 236
viewing totals by supplier 352
right-click options 45
rooms
creating 156
route status, definition 555
routes
defining PM and equipment 442
inspection points 567
sales prices
defining for customer contracts 532
save record button 41
saving report parameters 605
schedule
activities, freezing 473
schedule attainment report 698
scheduled activities report 699
scheduled vs. actual - detail report 699
schedules
daily trade report 682
screen designer
keyboard shortcuts 44
screen designer button 41
search
call center customers 807
knowledge base in call center 809
sequences
maintenance patterns 510
service categories
creating in call center 798
service delivery matrixes
creating for equipment 798
viewing associated knowledge base articles 801
service problem codes
associating GIS map layers 796
creating in call center 795
service request details
viewing 438
service requests 484
assigning personnel 491
associating properties with customers 484, 485
associating properties with employees 486
booking hours 492
closing 492, 495
creating 488
creating callers 484, 485
creating service codes 487
defining structures 486
issuing parts 493
log entries 496
returning parts 494
viewing work order details 492
services
adding to suppliers 209
creating work orders and activities 234
settlement details 117, 118
shift employee report 700
shifts
defining 369
defining days 370
short term WO list (activities) report 701
short term WO list (WOs) report 701
shutdown codes
associating with equipment 588
defining 588
defining initial project information 587
specifying report fields layout 603

S
safety
adding data to parts 197
safety review required report 697
safety review required report 697
specifying report group order 605
specifying report parameters 603
specifying report sort order 604
spell checker 46
standard work orders
  adding safety hazards and precautions 388
  associating permits 387
  defining 384
  managing 386
  safety review required report 697
standards
  calibration 584
Start Center
  accessing screens from the inbox 73
  adding entries to the inbox 72
  adding KPIs 74
  assessing KPI screens 74
  KPIs 73
  modifying the sequence of entries 72
  modifying the sequence of KPIs 74
  setting up inboxes 72
  setting up KPIs 73
  understanding the inbox 71
  viewing 71
start Infor EAM 39
statistics
  WO report 705
status of inspection points report 656
stock
  entering information for parts 215
  issuing parts from a stock record of a part 265
  recording stockouts for parts 212, 217
  returning parts from a stock record of a part 266
  stock in bins 312
  viewing and modifying information for parts 299
  viewing for stores 309
  viewing in-transit for parts 307
  viewing stock level by part 302
stock issues history by part report 666
stock transactions report 667
stock value listing by part type report 667
store groups
  defining transfer fees 273
stores
  creating 187
  creating bins 187, 189
  creating groups 273
  creating receipts 281
  creating store-to-store issue headers 278
  creating store-to-store receipt headers 281
  creating store-to-store requisition headers 274
  creating store-to-store requisitions 274
  defining pick ticket headers 289
  store-to-store issues 277
  viewing and modifying information 297
  viewing stock levels 309
strategies
  defining 160
strategies (continued)
  viewing policies 160
structures
  defining for budgets 779
sub-level budgets
  copying 784
substitutes
  defining for parts 201
supervisors
  defining 358
suppliers
  adding parts to a return 268
  adding services 209
  alternate catalog references 195, 197, 208
  associating account numbers 211
  associating commodities 211
  catalog 207
  copying 207
  defining 204, 205
  defining contacts 207
  defining rates 210
  defining trade rates 362
  return header 267
  returning parts 266
  trade rates 361
  viewing associated parts 309
  viewing purchase order history 209
survey work orders
  campaigns 599
sync errors
  iProcure 315
systems
  defining assets for healthcare 98
  defining for healthcare 103
  defining systems 84, 92
  viewing structure details for equipment 171
T
  table of equipment with custom fields report 622
  tabs 40, 42
tanks
  depots 504
  physical inventories 506
  receiving fuel 506
  viewing associated depots for fuels 507
task instructions
  deleting 374
  modifying 374
task lookup 46
tasks
  adding instructions 373
  associating qualifications 376
  completing checklists for work orders 376
  defining 372, 374
  defining prices 375
  hours needed report 685
  import checklists 377
tasks (continued)
  viewing checklists for work orders 412

tax codes
  defining 176

tax rate codes 177

tax rate types 176

tax rate values 177

taxes
  defining code 178
  defining rates 178

templates
  associating clauses with customer contracts 524
  associating discounts for customer contracts 527
  associating sales prices for customer contracts 524
  breaking up kits 272
  building kits 271
  copying for contracts 527
  defining charges 525
  defining for customer contracts 523
  defining for part kits 270
  kit list report 659
  work order criteria for customer contracts 523

terms
  call center 791
  defining for budgets 780
  defining periods for budgets 781
  fleet management 743

test point data
  defining for calibration 579
  defining or importing for calibrations 581

text boxes 46

tickets
  vehicle report 642


time dependence, definition 555

tolerances
  definition 555

tool usage report 702

toolbar 40, 41

tools
  associating with departments 80, 81
  defining 378
  defining simple 378
  requesting for work orders 430, 451
  standard work orders 386
  viewing transactions 378

tracking
  asset depreciation 132

trade rates
  defining 361

trades
  associating qualifications 362
  daily schedule report 682
  defining 361
  defining rates for supplier 362
  WO on-time delivery report 705

transactions
  tools 378
  viewing fuel 507

transactions (continued)
  viewing stock transactions per store 310

transfer equipment
  understand 123
  transferring equipment 122

U

units of measure
  conversion 180

units of output
  calculating depreciation 134
  equipment 140
  user defined fields 50
  user defined number fields
    options 51
  user interface 40

V

vehicle ticket report 642

vehicle tickets
  associating billing exceptions 749

vehicles
  creating for hospitality 159
  creating tickets 747
  viewing billing adjustments 749

vendor
  lead time report 678

vendors
  creating for iProcure 312
  creating Infor EAM suppliers for iProcure 313

verticals
  medical equipment work orders by criticality 645

VMRS 507
  activities report 643
  associating codes with warranties 82
  defining codes 380
  defining equipment 84, 97

W

warranties
  associating VMRS codes 82
  associating with equipment 115
  calendar-based 115, 129
  creating 117
  expired warranties report 684
  setting up 81
  usage-based 116, 129
  warranty claim vs. settlement chart report 624
  warranty claims report 624

web service prompts
  executing 816
  executing a 'delete' web service 817
  executing an 'update' web service 816

weekly booked hours by department report 625
Index

WO aging report 703
WO backlog report 702
WO cost by equipment report 626
WO cost by type, cost code, or dept report 626
WO cost list report 703
WO cost list-hospitality report 653
WO cost of equipment per location report 627
WO cost summary graph report 703
WO cost summary report 627
WO cost summary-hospitality report 654
WO daily scheduling
  defining parameters 514
  modifying labor schedules for employees 521
  modifying work order details 520
  scheduling labor 518
  selecting employees 518
  selecting equipment 517
  selecting work order activities 517
  viewing booked labor for employees 522
  viewing booked labor for work order activities 521
  viewing planned part availability for work order activities 521
  viewing planned part availability for work orders 416
WO on-time delivery by employee report 704
WO on-time delivery by trade report 705
WO statistics report 705
work
  defining initial information 357
  reports 678
work management
  booking hours 402, 412
  booking vendor hours 404
  creating PM work orders 441
  creating regular work orders 388
  creating standard work orders 383
  monthly scheduling details report 689
  PM work orders 443
work order
  changing route statuses 568, 569
work order activities
  qualifications 401
work order criteria
  defining for customer contracts 531
work order parts
  retrieving 350
work order status
  changing 472
work orders
  adding checklists to tasks 376
  adding permits 429
  adding planned parts 415
  adding safety hazards and precautions 432
  assigning child work orders 386
  associating permits with standard work orders 387
  batch adding comments 408
  batch generation summary report 679
  booked labor by activity report 679
  booking labor 402, 412
work orders (continued)
  booking labor in a batch 407
  booking vendor hours 404
  call center reports 680
  campaigns 599
  closing 475, 477
  completing 475
  copying labor schedules 398
  copying standard 385
  cost per equipment report 611
  creating activities 410
  creating customer invoices 775
  creating for GIS 733
  creating in GIS 718
  creating labor requisitions 396, 422, 423
  creating regular 388
  creating standard 383
  creating, updating, and completing 408, 409
  defining 389
  defining activities 384, 393, 446
  defining additional costs 395
  defining headers 383
  defining parameters for daily scheduling 514
  deleting child relationships 428
  generating 464
  importing equipment from an existing equipment route 400
  importing parts lists 421
  importing unlinked qualifications 401
  issuing parts 424
  list detail report 646
  list report 687
  load balancing 473
  maintenance patterns 513
  managing parts 415
  managing tools 386
  manually assigning repair details for core tracked parts 419
  medical equipment by criticality report 645
  modifying labor schedules for employees for WO daily scheduling 521
  monitored data results 424
  print healthcare report 643, 651
  proof of delivery report 696
  quick entry form 408, 414, 424
  recording tool usage 431
  releasing PMs 452
  reopening 479
  repairable core parts 467
  rescheduling 471
  reserving parts 421
  returning parts 259, 424, 425
  scheduling 471
  scheduling daily 514
  scheduling labor 397
  scheduling work 468
  updating 433
  viewing 433
work orders (continued)
viewing associations with projects 595
viewing checklists 412
viewing child work orders 438
viewing comments 472
viewing costs 434
viewing customer requests 486
viewing details for service requests 492
viewing details while balancing the workload 474
viewing equipment custom fields 438
viewing for campaigns 600
viewing loop instruments and calibration 584
viewing per PM Schedule 450

work orders (continued)
viewing planned part availability for WO daily scheduling 416, 521
viewing purchasing 439
viewing the schedule 468
work orders batch
updating closing details 478
work orders, quick
creating 732
work packages
creating and editing 453
work requests
approving 381
rejecting 381