Infor10 Enterprise Asset Management

System Administrator's Guide

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System Configuration

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

> **Important:** This chapter describes Infor Enterprise Asset Management functions that only a system administrator has rights to perform.
>
> This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Defining Installation Parameters

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

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

Follow these steps to define installation parameters.

1 Open the Install Parameters form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Install Parameter—Enter a unique code identifying the installation parameter, and then enter a description of the installation parameter in the adjacent field.

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

4 Value—Enter the default value for the parameter.
5 Click Save Record. The system saves record.

Understanding Entities

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

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

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

Defining System Codes

Define system codes to tailor the system to the entity. System codes allow you to define your own business processes; i.e., to create the steps for work order administration. The number of steps you create may be fewer than the ones created by the system codes at installation. You can also edit existing user codes.

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

Follow these steps to define system codes.

1 Open the System Codes form.
2 Setup—Select the type of setup for which to define system codes.
3 For Entity—Enter the entity for which to define system codes. The system displays the entity information.
   The system automatically populates the entity description.
4 Click Add User Code. The system inserts a new User Code Details record.
5 User Code—Enter a new user code to represent one of the system codes.
6 System Code—Enter the system code representing the user code.
7 Description—Enter a description of the user code.
8 System Default—Select one of the user codes as the system code if there are multiple user codes for one system code.
   The system uses this code as the default value for the Type or Status entity.
9 Out of Service—Select to designate system codes as out of service.
10 Click Submit. The system saves the record and updates the User Codes list.

   Note: To update the translations by language, click Translations. Refer to Entering Description Translations Chapter 1 Basics of the Infor EAM User's Guide.

Creating and Modifying Screens

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

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

Follow these steps to create or modify screens.

1 Open the Screens form. The system displays the List View page.
   The system automatically populates Class, Form Type, and Startup Mode.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Screen—Enter a unique six-character mnemonic code for the new screen, and then enter a brief description of the screen in the adjacent field.
4 Class—Enter the class of the screen.
   The system automatically populates Class Org.
5 Form Type—Select the form type for this screen.
6 Parent—Enter the screen on which this new screen is based.
7 Last Value—Enter the entity used by the system to "remember" the primary key field in this screen.
8 Icon—Enter the name of an existing icon file to associate an icon with the screen.
9 Report—Enter a report that prints (in the background) using the selected data on a screen. Also, specify background report parameters to use with this functionality.
10 Invoke Dataspy—Select to allow users to utilize dataspy filters on this screen.
11 Startup Mode—Select the stage of the query process in which the screen opens.

   • No Action—Select to open the form without running a Dataspy or displaying records.

   • Enter Insert Mode—Select to open the form on the Record View tab and in Insert Mode.

   • Run Dataspy—Select to open the form with the default Dataspy and to highlight the first record in the list.

   • Remember Dataspy—Select to open the form with the last remembered Dataspy (within the current session) with quick filter and quick sort for the form and to highlight the first record in the list.

   • Remember Last Value—Select to open the form with the last remembered value for the screen.

12 Employee Filter—Enter the employee type to apply to the screen.
13 URL Path—Enter the URL location of the screen.

   Note: Enter up to three parameters (:user, :password, or :org) in the URL Path to pass values to the new screen. These values must be entered in lowercase.
   Example: http://yourapp.yourserver.com?USERID=:user&PWD=:password

14 Open URL in New Window—Select to display the URL in a new browser window.
15 Click Save Record. The system saves the record.

> **Important:** After defining a new screen, you must authorize users to use the new screen. Refer to *Granting Screen-Level Permissions to User Groups* Chapter 2 System Security.

Changing Text On a Specific Screen

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

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

Follow these steps to change text on a specific screen.

1   Open the Screens form. The system displays the List View page.
2   Select the screen for which to change text, and then click the Text tab. The system displays the Text page.
3   Select the record for which to change text.
4   Text—Change the text as necessary.
5   Click Submit. The system saves the record and updates the Text list.

Remembering Fields for Forms

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

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

Follow these steps to remember fields for forms.

1   Open the Screens form. The system displays the List View page.
2   Select the screen for which to remember fields, and then click the Fields to Remember tab. The system displays the Fields to Remember page.
3   Click Add Field. The system inserts a new Field Details record.
4   Field—Enter the field of the value for the system to remember.
5   Entity—Enter the entity of the value for the system to remember.

    The system automatically populates the entity description.

6   Click Submit. The system saves the record and updates the Fields to Remember list.

    Note: To remove a field, select the field to remove, and then click Remove Field. The system removes the record and updates the Fields to Remember list.

Defining Custom Fields Information

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

Defining Custom Fields

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

Specify valid lookup values for a custom field using the Associate Custom Fields form. Refer to Associating Custom Fields with an Entity or Class.

Follow these steps to define custom fields.

1 Open the Custom Fields form.

2 Click Add Custom Field. The system inserts a new Custom Field Details record.

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

4 Type—Select one of the following field types:

- **Character**—Any alphanumeric characters.
- **Numeric**—Numeric values.
- **Date Field**—Date values in DD-MON-YYYY format.
- **Date/Time**—Date and time values in DD-MON-YYYY HH24:MI format.
- **Code+Description**—Unique code and a description of the code. Refer to Defining Lookup Values for Custom Fields.
- **System Entity**—Code description of an Infor EAM entity. The system enables the System Entity field.

5 System Entity—Enter the code description of the entity for which to define custom fields.

6 Minimum Value and Maximum Value—Specify the range of values users can enter.

7 Click Submit. The system saves the record and updates the Custom Fields list.

Note: To delete a custom field, select the custom field to delete, and then click Delete Custom Field. The system deletes the record and updates the Custom Fields list.

To view translations information, select the custom field for which to view translations, and then click Translations. The system displays the translation information. Refer to Entering Description Translations Chapter 1 Basics of the Infor EAM User's Guide.

Defining Global Text Changes

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

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

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

Follow these steps to define global text changes.

1 Open the Global Text Changes form.
2 Enter the search criteria in the Dataspy, and then select the record to update. The system displays the Boiler Text Details.
   The system automatically populates Current Text, Original Text, Language, Code, and Last Updated.
3 Alternate Text—Enter the text for the new boiler text.
4 Click Submit. The system saves the record and updates the Global Text Changes list.

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

   To reverse all of the system boiler text changes, click Undo All. The system makes the Original Text the Current Text for all records.

   To update all of the system boiler text changes, click Redo All. The system makes the Current Text the Alternate Text for all records.

Displaying Boiler Text Where Used

Follow these steps to display boiler text where used.

1 Open the Global Text Changes form.
2 Enter the search criteria in the Dataspy, and then select the record to update. The system displays the Boiler Text Details.
   The system automatically populates Current Text, Original Text, Language, Code, and Last Updated.
3 Click Where Used. The system displays the Where Used popup.
4 The system displays all screens where the selected record appears.

Defining Cost Codes

Define cost codes for the organization, and then reference them along with any data involving costs, such as work orders, purchases, material issues, etc. Charge maintenance costs to the correct area

by specifying cost codes. The cost for repairing a unit air conditioner, for example, might come out of a particular department's budget.

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

Follow these steps to define cost codes.

1 Open the Cost Codes form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Organization—Enter the organization to which the cost code belongs if you use multi-organization security.
4 Cost Code—Enter a unique code identifying the cost, and then enter a description of the cost code in the adjacent field.
5 Class—Enter the class of the cost code.
6 Non-billable—Select to prevent the cost code from being included when bills are generated. Transactions associated with non-billable cost codes will not be included in fleet bills.
7 Out of Service—Select to prevent the cost code from being displayed in lookups.
8 Account Segment Value—Enter the general ledger account code segment that represents the organization in your accounting structure. Refer to your chart of accounts for more information.
9 Click Save Record. The system saves the record.

Selecting Languages

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

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

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

Adding a New Language

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

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

Follow these steps to add a new language.

1 Open the Languages form. The system displays the Record View page.

2 Click New Record. The system displays the List View page.

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

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

4 Out of Service—Select to indicate the language is out of service.

5 Click Save Record. The system saves the record and updates the Languages list.

Note: To make a language Available, click Make Language Available. The system displays the Make Language Available popup.

To install an available language, click Install Available Language.

To refresh an installed language, click Refresh Installed Language. The system displays the Refresh Translated Text popup.

Making a Language Available

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

Follow these steps to make a language available.

1 Open the Languages form. The system displays the List View page.

2 Select a language to make available, and then click the Record View tab. The system displays the Record View page.

3 Click Make Language Available. The system displays the Make Language Available popup.

4 Language—Select the language from which to copy the available language.

5 Click Submit. The system makes the language Available and then closes the popup.

Installing an Available Language

Install a language after it has been made Available.

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

Follow these steps to install an available language.

1 Open the Languages form. The system displays the List View page.

2 Select a language to install, and then click the Record View tab. The system displays the Record View page.

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

Refreshing an Installed Language

Prior to refreshing a language, the language must be added, made available, and installed. Refer to Adding a New Language earlier in this chapter.

Follow these steps to refresh an installed language.

1 Open the Languages form. The system displays the List View page.
2 Select a language to refresh, and then click the Record View tab. The system displays the Record View page.
3 Click Refresh Installed Language. The system displays the Refresh Translated Text popup.
4 Choose one of the following options:

- Refresh All Dates—Select to refresh all translated text.
- Refresh Since—Select to refresh translated text beginning with the selected Date.

5 Boiler Text—Select to refresh boiler text.
6 Code Description Text—Select to refresh code description text.
7 Error Text—Select to refresh error text.
8 Menu Text—Select to refresh menu text.
9 Click Submit. The system refreshes the languages and closes the popup.

Viewing the Current Status of Boiler Text Records for New Languages

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

Follow these steps to view the current status of boiler text records for new languages.

1 Open the Languages form. The system displays the List View page.
2 Select the language for which to view current status of boiler text records, and then click the Boiler Text tab. The system displays the Boiler Text page.
3 Comparison Language—Enter the language for which to compare the boiler text.
4 View the translated and nontranslated boiler text.

Note: To download all selected records to MS Excel, click ▣. The system exports the translated text into Ms Excel for one-to-one translations.

Viewing the Current Status of Code Description Text Records for New Languages

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

Follow these steps to view the current status of code description text records for new languages.

1   Open the Languages form. The system displays the List View page.
2   Select the language for which to view current status of code description text records, and then click the Code Description Text tab. The system displays the Code Description Text page.
3   Comparison Language—Enter the language for which to compare the code description text.
4   View the translated and nontranslated code description text.

   Note: To download all selected records to MS Excel, click ⊠. The system exports the translated text into Ms Excel for one-to-one translations.

Viewing the Current Status of Error Text Records for New Languages

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

Follow these steps to view the current status of error text records for new languages.

1   Open the Languages form. The system displays the List View page.
2   Select the language for which to view current status of error text records, and then click the Error Text tab. The system displays the Error Text page.
3   Comparison Language—Enter the language for which to compare the error text.
4   View the translated and nontranslated error text.

   Note: To download all selected records to MS Excel, click ⊠. The system exports the translated text into Ms Excel for one-to-one translations.

Viewing the Current Status of Menu Text Tab for New Languages

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

Follow these steps to view the current status of menu text tab records for new languages.

1   Open the Languages form. The system displays the List View page.

2 Select the language for which to view current status of menu text tab records, and then click the Menu Text tab. The system displays the Menu Text page.

3 Comparison Language—Enter the language for which to compare the menu text tab.

4 View the translated and nontranslated menu text tab.

Note: To download all selected records to MS Excel, click ⊞. The system exports the translated text into Ms Excel for one-to-one translations.

Defining Closing Periods

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

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

Follow these steps to define closing periods.

1 Open the Closing Periods form.

2 Click Add Closing Period. The system inserts a new Closing Period Details record.
The system automatically populates Date Entered with the current server system date.

3 Closing Date—Enter the closing date for the period.

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

4 Click Submit. The system saves the record and updates the Closing Periods list.

Note: You cannot delete closing periods.

Creating and Modifying Locales

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

Follow these steps to create or modify locales.

1 Open the Locales form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

4 Monetary Decimal Separator—Enter the symbol used as the monetary decimal separator of the locale.

5 Monetary Group Separator—Enter the symbol used to separate monetary groupings in the locale.

6 Monetary Group Digits—Enter the number of digits needed to separate monetary groups in the locale.

7 Monetary Decimal Places—Enter the number of digits to appear after a monetary decimal in the locale.

8 Negative Symbol—Enter the symbol used to indicate a negative number in the locale.

9 Date Format—Select the date format of the locale.

10 Numeric Decimal Separator—Enter the symbol used as the numeric decimal separator of the locale.

11 Numeric Group Separator—Enter the symbol used to separate numeric groupings in the locale.

12 Numeric Group Digits—Enter the number of digits needed to separate numeric groups in the locale.

13 Numeric Decimal Places—Enter the number of digits to appear after a numeric decimal in the locale.

14 Positive Symbol—Enter the symbol used to indicate a positive number in the locale.

15 First Day of Week—Select the first day of the week in the locale.

16 Click Save Record. The system saves record.

Defining Documents

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

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

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

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

Follow these steps to define documents.

1 Open the Documents form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

4 Document—Enter a unique code identifying the document, and then enter a description of the document in the adjacent field.

5 Revision Number—Enter the revision number of the document, e.g., if you have updated the document since the document was entered in the system, enter 1.

6 Original Code—Enter the original code of the document.

7 File Location—Enter the location of the file.

8 File Type—Enter the type of file, i.e., word document (DOC), spreadsheet (XLS), etc.

9 Class—Enter the class of the document.
The system automatically populates Class Org.

10 Revision Date—Enter the date of the latest document revision.

11 Pages—Enter the number of pages in the document.

12 File Path—Enter the file path of the document, i.e., URL (www.infor.net), filename (infor.doc), etc.
The system automatically populates Original Filename and Uploaded.

13 Click Save Record. The system saves the record.

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

Click View Document to view the document.

To view or remove a document association, click the Where Used tab. The system displays the Where Used page. Refer to Removing Document Associations.

Setting Up Access to External Documents

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

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

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

Follow these steps to set up access to external documents.

1 Open the Install Parameters form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

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

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

5 Click Save Record. The system saves the record.

Setting Up Printers

Follow these steps to set up printers.

1 Open the Printers form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

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

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

5 Destination—Enter a unique destination identifying the path to the printer.

6 Special—Select to prevent the printer from being displayed in the Printer lookup when printing reports.

7 Click Save Record. The system saves the record.

Defining Classes

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

Note: If you are defining classes in Infor EAM Business Edition refer to Defining Classes and Custom Fields.

Follow these steps to define classes.

1 Open the Classes form.

2 Entity—Enter the entity for which to create classes. The system automatically populates the entity description.

3 Click Add Class. The system inserts a new Class Details record.

4 Class—Enter a unique code identifying the class.

5 Description—Enter a description of the class.

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

6 Organization—Enter the organization of the class if you use multi-organization security.

7 Coding Entity—Select the coding entity with which to associate the class.

8 Level—Enter the level of the class.

9 Out of Service—Select to prevent the class from being displayed in lookups.

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

10 Click Submit. The system saves the record and updates the Classes list.

    Note: To delete a class, select the class to delete, and then click Delete Class. The system deletes the record and updates the Classes list.

    To update the translations by language, click Translations. Refer to Entering Description Translations Chapter 1 Basics of the Infor EAM User's Guide.

Defining Classes and Custom Fields

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

Note: Classes can be created only for certain screens in Infor EAM Business Edition.

Follow these steps to define classes and custom fields.

1 Open the Classes and Custom Fields form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

4 Organization—Enter the organization if you use multi-organization security.

5 Screen—Select the form for which to create the class.

6 Out of Service—Select to indicate the class is out of service.

7 Click Save Record. The system saves the record.

Creating Part Hierarchy Codes

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

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

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

Follow these steps to create part hierarchy codes.

1 Open the Part Hierarchy Codes form.

2 Click Add Hiearchy Code. The system inserts a new Hiearchy Code Details record.

3 Description—Enter a description of the part code hierarchy.

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

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

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

  To update the translations by language, click Translations. Refer to Entering Description Translations.

5 Click Save Record. The system saves the record.

Defining Account Details

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

Note: Account detail codes are defined for use with Databridge and external accounting systems. Refer to Defining Account Detail Codes Chapter 5 General Ledger Administration of the Databridge System Administrator's Guide.

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

Follow these steps to define account details.

1 From any form for which account details is activated, click the Account Details tab. The system displays the Account Details page.

2 Select the entity for which to access account details. The system displays the Record Details. The fields for the selected entity are displayed for information only and are protected. Only the account detail fields are editable.

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

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

4 Segment 01 through Segment 30—Enter the account code segment(s) for the account detail record as you have defined the account code segment codes on the Account Detail Setup form.

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

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

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

5 Click Submit. The system saves the record and updates the Account Details list.

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

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

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

Defining Capital Request Categorization Codes

Define capital request categorization codes for use on the Capital Planning Request form. Refer to Creating Capital Planning Requests Chapter 5 Work Management.

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

Follow these steps to define capital request categorization codes.

1 Open the Capital Request Categorization Codes form.
2 Click Add Categorization Code. The system inserts a new Categorization Code Details record.
3 Description—Enter the description of the capital request categorization code.

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

4 Major Group Element—Enter the major group element.
5 Group Element—Enter the group element.

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

6 Individual Element—Enter the individual element.

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

7 Click Submit. The system saves the record.

Note: To delete a categorization code, select the code to delete, and then click Delete Categorization Code. The system deletes the record and updates the Capital Request Categorization Codes list.

Auditing Attributes

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

Note: The number of audits might grow very fast; purge data frequently to aid system performance. Refer to Purging Audit Records.

Setting Up Audit Triggers

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

Follow these steps to set up audit triggers.

1 Open the Audit Setup form. The system displays the Tables page.
2 Table—Enter the table for which to set up audit triggers.
3 Click Add Trigger. The system inserts a new Trigger Details record.
4 Field—Enter the field to audit, and then enter a description in the adjacent field.
5 Update—Select to track updates.
6 Insert—Select to track insertions.
7 Delete—Select to track deletions.
8 Comments—Enter additional comments concerning the trigger.
9 Click Submit. The system saves the record and updates the Audit Setup list.

Note: To delete a trigger, select the trigger to delete, and then click Delete Trigger. The system deletes the record and updates the Audit Setup list.

Defining Flex SQL Statements

Define Flex SQL statements to define validation rules that are specific to your organization. You can set up one or more statements to be processed for postinsert or postupdate events.

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

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

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

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

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

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

Follow these steps to define Flex SQL statements.

1   Open the Flex SQL form. The system displays the List View page.
2   Click New Record. The system inserts a new record and displays the Record View page.
3   Table—Enter the database table.
4   Sequence Number—Enter the sequence number for the Flex SQL statement.
5   Trigger—Select one of the following options:

   •   Post Insert
   •   Post Update

6   SQL Statement—Enter the SQL statement for the selected database table.
7   Failure Message—Enter the failure message.
8   Comments—Enter comments regarding the Flex SQL statement.
9   Must Exist—Select if the Flex SQL statement must exist in the database table.
    If Must Exist is selected, the system runs SQL statements in order of Sequence Number. If one statement fails, the remainder do not run.

    If Must Exist is not selected, each statement runs separately.

10 Abort on Failure—Select for the system to abort the statement upon failure.
    If Abort on Failure is checked, the system returns the **Failure Message** field value, does not process any remaining SQL statements, and cancels the save that triggered the flex SQL.
11 Reverse Return Code—Select for the system to automatically reverse the returned value upon statement completion, i.e., Null becomes Not Null.
    Reverse Return Code is used only with **Abort on Failure**.

12 Active—Select to set this Flex SQL statement record to active.

13 Click Save Record. The system saves the record.

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

Setting Up Messenger

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

Defining Installation Parameters for Messenger

Follow these steps to define installation parameters for Messenger.

1 Open the Install Parameters form. The system displays the List View page.

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

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

3 Click Save Record. The system saves the record.

Creating E-mail Templates for Messenger

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

Follow these steps to create e-mail templates for Messenger.

1 Open the E-mail Templates form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

4 E-mail Recipients—Select the recipients of the e-mail message. Separate e-mail addresses with a space or a ;. Refer to Selecting Multiple Recipients for E-mail Notification.

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

5   E-mail Subject—Enter the subject of the e-mail message.
6   E-mail Body—Compose the e-mail message. Identify the parameter number(s) that corresponds to the column of the system table to be displayed with this e-mail. Enter %1 - %15 for each parameter.
7   Click Save Record. The system saves the record.

Selecting Multiple Recipients for E-mail Notification

Follow these steps to select multiple recipients for e-mail notification.

1   Open the E-mail Templates form. The system displays the List View page.
2   Click New Record. The system inserts a new record and displays the Record View page.
3   Click the E-mail Recipients lookup. The system displays the E-mail Recipients popup.
4   Select recipients from the list.
5   Click OK. The system saves the record and displays the E-mail Templates form.

Creating E-mail Notifications for Messenger

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

Follow these steps to create e-mail notifications for Messenger.

1   Open the E-mail Notification Setup form.
2   Table—Enter the table for which to create the e-mail notification.
3   Click Add E-mail Notification. The system inserts a new Trigger Details record.
4   E-mail Template—Enter the e-mail template to send when this e-mail notification is activated. The system automatically populates the E-mail Template description and Created By.
5   Select one or more of the following events:

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

6   From Status—Enter any status for which to send an e-mail.
7   To Status—Enter the updated status for which to send an e-mail.
8   Active—Select to make the selected record active. The system may clear this checkbox if you add, modify, or delete parameters or conditions.
9   Include URL—Select to include the URL in the notification. This checkbox is available only for the following tables:

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

10 Comments—Enter any comments to include in the body of the e-mail notification.
11 Click Submit. The system saves the record and updates the E-mail Notifications list.
The system automatically selects Update if either From Status or To Status is entered.

Note: To delete an e-mail notification, select the e-mail notification to delete, and then click Delete E-Mail Notification. The system deletes the record and updates the E-mail Notifications list.

Purging E-mail Records

Follow these steps to purge e-mail records.

1 Open the E-mail Notification Setup form.
2 Table—Enter the table for which to purge e-mail records, and then click Purge E-mail Records. The system displays the Purge E-mail Records popup.
3 From Date and To Date—Enter the date range of the e-mail records to be purged.
4 Click Submit. The system deletes all existing e-mail records that were sent during the defined time period for all tables.

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

5 Click Close. The system closes the Purge E-mail Records popup.

Setting Up E-mail Notification Parameters

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

Parameters must also be set up in the template e-mail body. Refer to Creating E-mail Templates for Messenger.

Follow these steps to set up e-mail notification parameters.

1   Open the E-mail Notification Setup form.
2   Table—Enter the table for which to set up e-mail notification parameters.
3   Select the record for which to set up parameters, and then click Create Parameters. The system displays the E-mail Parameters popup.
4   Click Add Parameter. The system inserts a new Parameter Details record.
5   Parameter—Enter the parameter number for the e-mail notification.

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

6   Column—Enter the name of the column of the system table to be used when creating the e-mail content for the e-mail body.
7   Click Submit. The system saves the record and updates the Parameters list.

   Note: The system clears Active on the associated E-mail Notification record.
   To delete a parameter, select the parameter to delete, and then click Delete Parameter. The system deletes the record and updates the Parameters list.

8   Click Close. The system closes the E-mail Parameters popup.

Setting Up E-mail Notification Conditions

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

Follow these steps to set up e-mail notification conditions.

1   Open the E-mail Notification Setup form.
2   Table—Enter the table for which to setup e-mail notification conditions.
3   Select the record for which to set up conditions, and then click Create Conditions. The system displays the E-mail Conditions popup.
4   Click Add Condition. The system inserts a new Condition Details record.
5   Column—Enter the name of the column on the system table that applies to the e-mail notification.
6   Condition—Select the criteria for the e-mail notification.

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

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

7 Value 1 and Value 2—Enter the value of the e-mail notification condition.

8 Enter values according to the following formats:

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

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

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

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

- Characters—'engine'

- Contains—'%pump%'

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

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

9 Click Submit. The system saves the record and updates the Conditions list.

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

To delete a condition, select the condition to delete, and then click Delete Condition. The system deletes the record and updates the Conditions list.

10 Click Close. The system closes the E-mail Conditions popup.

Viewing Initiated E-mails for Messenger

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

Follow these steps to view initiated e-mails for Messenger.

1 Open the E-mail Viewer form.
2 Select the record for which to view the initiated e-mail.
3 View the following information regarding the e-mail record:

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

Alert Management

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

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

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

> **Important:** Create an active Alert Management grid on the Grid Designer form before setting up an alert on the Alerts form. Refer to Defining Grids Chapter 3 Interface Configuration.

Creating Alerts

Follow these steps to create e-mail and work order alerts for specific equipment.

1 Open the Alerts form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Enter a description for the alert.
4 Active—Select to set this alert to active.
5 Grid Name—Enter the grid name defined for the Alerts form on the Grid Designer form. Refer to Defining Grids Chapter 3 Interface Configuration.
   The system automatically populates the grid description and Grid Active.
6 Dataspy—Select the Dataspy for the grid.
7 Exception Entity—Enter the exception entity.
8 Grid Key Field 1—Enter the mapping to the corresponding grid column that should be used as a key field in the grid, e.g., if analying equipment this would map to the equipment column in the grid. The system automatically populates the grid key field 1 description.
9 Grid Key Field 2—Enter the mapping to the corresponding grid column that should be used as a key field in the grid, e.g., if analying equipment this would map to the equipment column in the grid. The system automatically populates the grid key field 2 description.

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

10 Use Min/Max—Select to use a minimum and maximum range for this alert.
11 Min/Max Value Field—Enter the mapping to the corresponding grid column. During the alert process the system analyzes the result of the field for each row in the grid and compares it to the min/max selections on the form.

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

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

14 Trigger within Min/Max Values—Select to trigger alerts when the result value is within the Min Value and Max Value.

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

Enter the user-defined fields. Refer to Entering User Defined Fields Entering User Defined Fields of the Infor EAM User's Guide.

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

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

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

17 Work Order—Select to create a work order alert based on specific parameters. Refer to Creating Work Order Alerts.

18 E-mail—Select to create an e-mail alert based on specific parameters. Refer to Creating E-mail Alerts.

19 Click Save Record. The system saves the record.
The system automatically populates Alert, Created By, and Date Created.

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

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

Creating Region Codes

Create and update region codes for tracking degree days.

Follow these steps to create and edit region codes.

1 Open the Regions form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

3 Region—Enter a name for the new region.

4 Region Description—Enter a unique description for the region.

5 Postal Code—Enter the postal code for the specific region.

6 Organization—Select an organization for the region.

7 Class—Select a class for the region.

8 Out of Service—Select to designate this region as out of service.

9 Degree Day Reference Point—Enter a value for the degree day reference point.

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

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

12 Click Save Record. The system saves the record and creates and initializes 366 records for the Historical Temperatures tab.

Recording Actual Temperatures for Regions

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

Follow these steps to record actual temperatures.

1 Open the Regions form. The system displays the List View page.

2 Select the region for which to record actual temperatures, and then click the Actual Temperatures tab. The system displays the Actual Temperatures page.

3 Click Add Actual Temperature. The system inserts a new Actual Degree Day Details record.

4 Date—Enter the date for which to record actual temperatures.

The system automatically populates Day of Year, Month, Day, and Year.

5 Temperature Minimum—Enter the minimum temperature for which to record actual temperature data.

6 Temperature Maximum—Enter the maximum temperature for which to record actual temperature data.

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

7 Click Submit. The system creates the record.

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

To purge actual temperature records to a specific date, click Purge Actual Temperature Records. The system displays the Purge Degree Day Records popup. Up To Date—Enter the date for which to purge the system of all records up to and including this date. Click Submit. The system purges the records and closes the popup.

Updating Historical Temperatures for Regions

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

Follow these steps to update historical temperatures for regions.

1 Open the Regions form. The system displays the List View page.

2 Select a region code for which to update historical temperatures, and then click the Historical Temperatures tab. The system displays the Historical Temperatures page.

3 The system automatically populates Temperature Average, Day of Year, Month, and Day.

4 Temperature Minimum—Enter the new minimum temperature.

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

6 Click Submit. The system updates the record.

Configuring Infor EAM to Generate Oracle Forms Reports

Configure Infor EAM to run reports that are in the Oracle Forms version of the product, e.g., the Print work order cards report (WRJOBF). Refer to Chapter 15 Module Reports of the (Oracle Forms) User's Guide for more information about the reports that are available in the Oracle Forms version of the product.

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

Creating the Oracle Forms Report Configuration for Infor EAM

Follow these steps to create the Oracle Forms report configuration for Infor EAM.

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

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

2 Open the formsweb.cfg file in a text editor.

3 Create a baseHTMLjinitiator parameter that includes the value of the base Java Initiator page according to the following example:

```
[d7irep]
```

```
envfile=D7i.env
```

```
baseHTMLjinitiator=7irep.htm
```

4 Save and exit the file.

System Security

2

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

> ⭐ **Important:** This chapter describes Infor Enterprise Asset Management functions that only a system administrator has rights to perform.
>
> This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Implementing Multi-organization Security (MOS)

Multi-organization security (MOS) is a feature that allows the system administrator to set up separate, secured, logical databases within the organization. There is one logical database for each organization; however, there is still one physical system database. To activate MOS, you must set the MULTIORG installation parameter to YES. Refer to "Defining Installation Parameters" on page 11 Chapter 1 System Configuration. After activating MOS, you cannot deactivate it. Depending on the type of security set up, the system does not allow users to view or influence data from organizations to which they do not belong.

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

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

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

> ⭐ **Important:** MOS affects many system functions, and some sections in the user documentation apply only to MOS.

Defining Organizations

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

Follow these steps to define organizations.

1 Open the Organizations form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

3 Organization—Enter a code identifying the organization, and then enter a description of the organization in the adjacent field.

4 Currency—Enter the currency to attach to the organization.

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

6 Set of Books Name—Enter the name for your general ledger books.

7 Choose one of the following options for invoice matching:

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

   • Match Tolerance %—Enter the percentage allowed as the difference between the purchase order line cost and the invoice line cost when matching cost lines. If no value is specified, the system automatically sets the value to 0.

   • Match Quantity Tolerance %—Enter the percentage allowed as the difference between the purchase order line quantity and the invoice line quantity when matching line quantities. If no value is specified, the system automatically sets the value to 0.

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

9 Code Reference—Enter the code identifying the code reference for the organization.

10 Server Time Offset—Enter the number of hours difference between the system server and your local time if the system server is in a different time zone.

11 Account Segment Value—Enter the general ledger account code segment that represents the organization in your accounting structure. Refer to your chart of accounts for more information.

12 Accounting Entity—Enter an accounting entity for the organization.

13 Depreciation Type—Select the depreciation type for assets within the organization. The system automatically populates Depreciation Type based on the setting of the ASDEPTYP installation parameter. However, selecting a depreciation method at the organization level overrides the setting of the ASDEPTYP installation parameter.

14 Common—Select to indicate that the organization is common, i.e., the system shares information defined for this organization among all organizations.

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

15 Click Save Record. The system saves the record.

Defining Fiscal Years for Asset Depreciation

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

After defining fiscal years, you can update them as necessary. However, updating an existing fiscal year can invalidate records associated with equipment for which unit of output is the depreciation method. Refer to "Tracking Asset Depreciation" Chapter 2 Asset Management of the *Infor EAM User's Guide*.

Follow these steps to define fiscal years for asset depreciation.

1 Open the Organizations form. The system displays the List View page.
2 Select the record for which to define fiscal years, and then click the Fiscal Years tab. The system displays the Fiscal Years page.
3 Click Add Fiscal Year. The system inserts a new Fiscal Year Details record.
4 Start Date—Enter the date on which the fiscal year begins.
5 End Date—Enter the date on which the fiscal year ends.
6 Click Submit. The system saves the record and updates the Fiscal Years list.

Note: To delete a fiscal year, select the fiscal year to delete, and then click Delete Fiscal Year. The system deletes the record and updates the Fiscal Years list.

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

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

Activating Multi-Organization Security

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

Example:

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

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

Refer to Defining Installation Parameters Chapter 1 System Configuration.

Follow these steps to activate multi-organization security.

1 Open the Multi-org Security form.
2 Select the entity for which to activate multi-organization security.
3 Multi-org—Select to activate the entity.

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

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

4 Click Save Record. The system saves the record.

Setting Up User Groups

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

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

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

Creating User Groups

Follow these steps to create user groups.

1 Open the User Groups form The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

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

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

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

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

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

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

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

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

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

8 Department—Enter a default department for the user group.

9 Session Timeout (minutes)—Enter the amount of time in minutes in which the system will timeout.

10 Corrections Allowed—Select to allow users to make corrective hour bookings in the work management module.

11 Click Save Record. The system saves the record.

Viewing Users

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

Follow these steps to view users.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to view users, and then click the Users tab. The system displays the Users page.

3 View the user information.

Granting Interface Permissions to User Groups

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

Follow these steps to grant interface permissions to user groups.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to grant interface permissions, and then click the Interface Permissions tab. The system displays the Interface Permissions page.

3 Click Add Permission. The system inserts a new Function Permissions record.

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

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

- Query—Select to allow users to retrieve records.
- Update—Select to allow users to update records. Users must have query permission to update records.
- Insert—Select to allow users to insert new records.
- Delete—Select to allow users to delete records. Users must have query permission to delete records.

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

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

6 Click Submit. The system saves the record and updates the Interface Permissions list.

Note: To remove a permission, select the function to remove, and then click Remove Permission. The system removes the record and updates the Interface Permissions list.

Associating Business Processes with User Groups

Configure which business processes are available for each user group.

Follow these steps to associate business processes with user groups.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to associate business processes, and then click the Business Processes tab. The system displays the Business Processes page.

3 Click Add Business Process. The system inserts a new Business Processes Details record.

4 Sequence Number—Enter the number identifying the sequence in which the business process should appear for this user group.

5 Business Process—Enter the business process to set up for this user group.

6 Click Submit. The system saves the record and updates the Business Processes list.

Note: To remove a business process, select the business process to remove, and then click Remove Business Process. The system removes the record and updates the Business Processes list.

Adding Inboxes to User Groups

Follow these steps to add inboxes to a user group.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to add an inbox, and then click the Inbox tab. The system displays the Inbox page.
3 Click Add Inbox. The system inserts a new Inbox Details record.
4 Inbox—Enter the inbox name.

   The system automatically populates the inbox description.

5 Click Submit. The system saves the record and updates the Inbox list.

   Note: To remove an inbox, select the inbox to remove, and then click Remove Inbox. The system removes the record and updates the Inbox Details list.

Adding KPIs to User Groups

Follow these steps to add KPIs to user groups.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to add a KPI, and then click the KPI tab. The system displays the KPI page.
3 Click Add KPI. The system inserts a new KPI Details record.
4 Inbox—Enter the KPI name.
   The system automatically populates KPI description.
5 Click Submit. The system saves the record and updates the KPI Details list.

   Note: To remove a KPI, select the KPI to remove, and then click Remove KPI. The system removes the record and updates the KPI Details list.

Granting Work Order Authorization Permissions to User Groups

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

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

Follow these steps to grant work order authorization permissions to user groups.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to grant work order permissions, and then click the WO Authorizations tab. The system displays the WO Authorizations page.

3 Click Add Authorization. The system inserts a new Authorization Details record.

4 WO Type—Select the work order type for which to grant permissions.

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

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

6 Click Submit. The system saves the record and updates the WO Authorizations list.

Note: To delete an authorization, select the authorization to delete, and then click Delete Authorization. The system deletes the record and updates the WO Authorizations list.

Granting Store Transaction Permissions to User Groups

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

Follow these steps to grant store transaction permissions to user groups.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to grant store transaction permissions, and then click the Store Security tab. The system displays the Store Security page.

3 Click Add Store. The system inserts a new Store Security Details record.

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

5 Issues/Returns—Select to allow users to issue parts from this store and to return parts to this store.

6 Store-to-Store Issues (From Store)—Select to allow users to transfer parts from this store on the Quick Store-to-Store Transfer form and the Store-to-Store Issues form.

7 Store-to-Store Receipts (To Store)—Select to allow users to transfer parts to this store on the Quick Store-to-Store Transfer form and on the Store-to-Store Receipts form.

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

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

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

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

12 Update Stock Records—Select to allow users to update Qty. on Hand on the Stock page of the Parts form.

13 Scrap Parts from Stock—Select to allow users to scrap parts directly on the Scrap popup.

14 Click Submit. The system saves the record and updates the Store Security Details record.

> **Note:** To remove a store, select the store to remove, and then click Remove Store. The system removes the record and updates the Store Security list.

Creating Security Filters

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

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

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

For information about basic Dataspy functions, refer to "Dataspy" Chapter 1 Basics of the *User's Guide*.

After creating a security filter, assign the security filter to a user group. Refer to "Granting Screen-level Permissions to User Groups" on page 49.

Granting Screen-level Permissions to User Groups

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

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

Follow these steps to grant screen-level permissions to user groups.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to grant screen-level permissions, and then click the Screen Permissions tab. The system displays the Screen Permissions page.

3 Click the plus sign (+) beside the menu and/or submenu you wish to view. The system expands the menu and/or submenu and displays the folders and screens that reside at various levels below the

main menu and/or submenu structure. Refer to Setting Up Menus for User Groups for more information about the user group security hierarchy.

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

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

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

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

If you select a screen or tab that has system-defined security, certain fields will remain protected. For example, the Issue/Return Parts screen does not allow deletes. The system protects Delete.

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

- Query—Select to allow users to retrieve data from the database.
- Insert—Select to allow users to insert new data into the database.
- Update—Select to allow users to update data previously retrieved from existing records in the database. Users must have query permission to update database information.

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

- Delete—Select to allow users to delete data from the database. Users must have query permission to delete data from the database.
- Tab Available—Select to make a tab available to the user group.
- Tab Always Displayed—Select to display the tab to the user group at all times.
- Security Filter—Enter the necessary Dataspy to prevent the user group from accessing specific records. Refer to Creating Security Filters.

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

When you select Tab Always Displayed, the system automatically selects Tab Available.

6 Click Submit. The system saves the record.

Setting Up Menus for User Groups

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

the items may be a mix of folders and screens. Finally, the Screen level may contain up to 30 items, but the items must be screens.

Follow these steps to set up menus for user groups.

1   Open the User Groups form. The system displays the List View page.
2   Select the user group for which to set up menus, and then click the Menus tab. The system displays the Menus page.
3   View the tree structure, and then click the plus sign (+) beside the menu and/or sub-menu you wish to view. The system expands the menu and/or sub-menu and then displays the folders and screens that reside at various levels below the main menu and/or sub-menu.

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

4   Available Screens—From the right panel of the form, select the screen to add to the menu structure.
5   Drag and drop the screen name into the desired menu structure location on the tree structure. The system checks the number of screens applied to the menu structure. If less than 30 screens exist, the system adds the screen to the tree structure and expands to illustrate the level of the screen as necessary.

    The system also inserts the screen into the Screen Permissions table and the Tab Permissions table as necessary.

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

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

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

Showing Menu Items

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

Follow these steps to show menu items.

1   Open the User Groups form. The system displays the List View page.
2   Select the user group for which to show menu items, and then click the Menus tab. The system displays the Menus page.
3   Select the folder, screen, or tab to show, and then click Show Menu Item. The system displays the hidden item.
4   Click Save Record. The system saves the record and updates the tree structure.

Hiding Menu Items

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

Follow these steps to hide menu items.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to hide menu items, and then click the Menus tab. The system displays the Menus page.
3 Select the folder, screen, or tab to hide, and then click Hide Menu Item. The system hides the item.
4 Click Save Record. The system saves the record and updates the tree structure.

Adding Main Menu Folders

Follow these steps to add main menu folders.

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

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

4 Label—Enter the name of the new folder.
5 Click Submit. The system saves the record and updates the tree structure.

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

Adding Sub-menu Folders

Follow these steps to add sub-menu folders.

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

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

4 Label—Enter the name of the new folder.
5 Click Submit. The system saves the record and updates the tree structure.

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

Changing Label Names

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

Follow these steps to change label names.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to change label names, and then click the Menus tab. The system displays the Menus page.
3 Select the menu item for which to change the label name, and then click Change Label. The system displays the Change Label popup.
4 New Label—Enter the new label of the menu item.
5 Click Submit. The system saves the record and updates the tree structure.

Changing Screen Tab Orders

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

Follow these steps to change screen tab orders.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to change screen tab orders, and then click the Menus tab. The system displays the Menus page.
3 Select the screen for which to change the tab order, and then click Change Tab Order. The system displays the Change Tab Order popup.
4 Error Message—The system displays any error messages associated with the tab.
5 Click Submit. The system saves the record and updates the tab order.

Copying Menus

Copy menus from one user group to another user group.

Follow these steps to copy menus.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group to which to copy menus, and then click the Menus tab. The system displays the Menus page.
3 Click Copy Menu. The system displays the Copy Menu popup.
  The system automatically populates To Group with the current user group.
4 From Group—Enter the the user group from which to copy the menu.
5 Click Submit. The system saves the record, copies the menu, and copies all Screen Permissions and Tab Permissions.

Viewing Form-level Help

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

Follow these steps to view form-level help.

1 Open the User Groups form. The system displays the List View page.
2 Click the Menus tab. The system displays the Menus page.
3 Select the screen for which to view help, and then click Help. The system displays the screen-specific Help.
4 View the help information.

Setting Up Scanner Menus for User Groups

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

In order to create folders of the menu structure, you must first create a screen for each folder. Refer to "Creating and Modifying Screens" on page 13 Chapter 1 System Configuration for more information on creating screens.

Follow these steps to set up scanner menus for user groups.

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

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

4 Specify a Dataspy or Filter as necessary. Refer to Chapter 1 Basics in the *User's Guide* for more information.
5 Available Prompts—From the right panel of the form, select the prompt to add to the menu structure.
6 Drag and drop the prompt into the desired menu structure location on the tree structure.
   The system also inserts the prompt into the Screen Permissions table.

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

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

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

Adding Scanner Main Menu Folders

Follow these steps to add scanner main menu folders.

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

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

4 Menu Code—Enter the name of the new folder.
   The system automatically populates Description.
5 Click Submit. The system saves the record and updates the tree structure.

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

Adding Scanner Sub-Menu Folders

Follow these steps to add scanner sub-menu folders.

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

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

4 Menu Code—Enter the name of the new folder.
   The system automatically populates Description.
5 Click Submit. The system saves the record and updates the tree structure.

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

sub-menu folder to another scanner sub-menu folder, the system adds the scanner sub-menu folder directly below the existing scanner sub-menu folder.

Defining Status Authorizations for User Groups

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

Note: The Status Authorizations page of the User Groups form is available only in Infor EAM Business Edition.

Follow these steps to define status authorizations for user groups.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to grant status change authorizations, and then click the Status Authorizations tab. The system displays the Status Authorizations page.
3 Click Add Authorization. The system inserts a new Authorization Details record.
4 Screen—Select the screen for which to define status authorizations.
5 From Status—Enter the status from which to change authorizations.
   The system automatically populates the description.
6 To Status—Enter the status to which to change authorizations.
   The system automatically populates the description.
7 Click Save Record. The system saves the record and updates the Status Authorizations list.
   To remove an authorization, select the authorization to remove, and then click Remove Authorization. The system removes the record and updates the Status Authorizations list.

Administering 7i Buy Security for User Groups

Administer 7i Buy security for user groups by specifying which 7i Buy buttons the system enables security.

Follow these steps to administer 7i Buy security for user groups.

1 Open the User Groups form. The system displays the List View page.
2 Select the user group for which to administer 7i Buy security, and then click the 7i Buy Security tab. The system displays the 7i Buy Security page.
3 Active—Select to administer 7i Buy security per button. By selecting Active for a user group, the system denies the user group access to the specified button functionality.

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

4 Click Save Record. The system saves the record.

Setting Up Users

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

Creating Users

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

Follow these steps to create users.

1 Open the User IDs form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
   The system automatically populates Locale, Success Msg. Timeout, and Infor EAM.
3 User ID—Enter a unique code identifying the user, and then enter a description of the user in the adjacent field. The description is usually the user's full name.
4 Language—Select the default language for the user.
5 User Group—Enter the user group to which the user is assigned.
6 User ID Expiration Date—Enter the date on which the User ID expires.
7 Password—Enter a six to twelve character password for the user. The system masks the password with asterisks as you type.

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

   To unlock the user record, open the User IDs form, which will display the Unlock User button (under normal circumstances, the Unlock User button is hidden). Click the Unlock User button. The system will unlock the user and hide the Unlock User button.

8 Password Expiration Date—Enter the date on which the password expires.
9 E-mail Address—Enter the user's e-mail address.
10 Buyer—Select if the user can buy materials/services.
11 Infor EAM Mobile Administrator—Select if the user is an administrator for Infor EAM Mobile.
12 Class—Enter the class code for the user.
13 Locale—Select the locale of the user.

14 Department—Enter the default department for the user.

15 Session Timeout (minutes)—Enter the amount of time in minutes in which the system will timeout.

16 Success Msg. Timeout—Select the amount of time in which success messages will timeout.

17 First Screen—Enter the code identifying the function to which the system defaults when the user logs in to the system.

18 Screener—Select if the user can screen work requests.

19 Screen Designer—Select if the user can set up the appearance of screens.

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

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

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

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

23 Infor EAM Requestor—Select to indicate that this user is a Requestor user.

> **Note:** Enter the Requestor user group in User Group to associate the Requestor user with the Requestor user group.
>
> The Requestor user may only submit work requests and/or purchase requests.

24 Author—Select to indicate that the user is a reporting author.

25 Requisition—Enter the maximum amount the user can enter on a requisition or requisition line.

26 Requisition Approval—Enter the maximum amount the user can approve for a requisition.

27 Invoice Approval—Enter the maximum amount the user can approve on invoices and invoice lines.

28 Non-PO Inv. Approval—Enter the maximum amount the user can approve on nonpurchase order invoices.

29 Purchase Order—Enter the maximum amount the user can enter on a purchase order or purchase order line.

30 PO Approval—Enter the maximum amount the user can approve for a purchase order or purchase order line.

> **Note:** Set Requisition, Purchase Order , Requisition Approval, and PO Approval at either the header level or the line-item level in Installation Parameters. You do not need to define them for every user.
>
> If you are setting up a new user in a multi-organization environment the fields are set on the Organizations page of the User Groups form and the Roles form.

31 Pick Ticket Approval—Enter the maximum amount of parts that the user can approve for pick tickets.

> **Note:** If multi-organization security is activated, you must define purchase order and requisition limits on the Organization page of the User form.

32 Click Save Record. The system saves the record.

> **Note:** Click Unlock User to unlock locked users and make them active in the system.

Changing Passwords

Change passwords for individual users. Passwords are encrypted in the .xml configuration files and are preceded by '{ENCR}' in the .xml file. The following types of passwords will be encrypted: database schema passwords, Websphere/Weblogic administrator passwords, and LDAP access-user passwords.

Follow these steps to change passwords.

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

Associating Users with Organizations

After setting up new system users, associate them with specific organizations. When the user logs in to the system, the default organization determines to what user group the user belongs for that system session.

Follow these steps to associate users with organizations.

1 Open the User IDs form. The system displays the List View page.
2 Select the user with whom to associate the organization, and then click the Organizations tab. The system displays the Organizations page.
3 Click Add Organization. The system inserts a new Organization Details record.
4 Organization—Enter the organization to associate with the user.
The system automatically populates the organization's description in the adjacent field and selects Commonif the organization is a common organization.
5 User Group—Enter the user group to which the user belongs.
6 Default—Select to indicate that this organization is the default organization for this user, i.e., the system automatically displays this organization when the user logs in to Infor EAM and on most forms that have an Organization lookup.

   Note: The system allows only one default organization.

7 Requisition—Enter the user's requisition limit.
8 Requisition Approval—Enter the user's requisition approval limit.
9 Invoice Approval—Enter the user's invoice approval limit.
10 Non-PO Inv. Approval—Enter the user's non-purchase order invoice approval limit.
11 Purchase Order—Enter the user's purchase order limit.
12 PO Approval—Enter the user's purchase order approval limit.
13 Pick Ticket Approval—Enter the user's pick ticket approval limit.
14 Click Submit. The system saves the record and updates the Organizations list.

Note: To remove an organization, select the organization to remove, and then click Remove Organization. The system removes the record and updates the Organizations list.

You cannot remove the system organization.

Creating LDAP Roles

Lightweight Directory Access Protocols (LDAP) can store hierarchical data definitions across platforms. LDAP is most often used to store user credentials across many applications. Create LDAP roles for automatic user creation.

Note: If LDAP authentication is enabled, Call Center module log ins are authenticated by Infor EAM and LDAP settings are ignored.

Follow these steps to create LDAP roles.

1 Open the Roles form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Role—Enter a unique code identifying the role, and then enter a description of the role in the adjacent field.
4 User Group—Enter the user group to which users of the role are assigned.

   Note: If you enter a Requestor user group in User Group, the system automatically selects Infor EAM Requestor and automatically unselects Infor EAM.

5 Default Org.—Enter the default organization of the role.
6 Language—Select a default language for the role.
7 Success Msg. Timeout—Select the amount of time in which success messages will timeout.
8 Infor EAM Mobile Administrator—Select if users of the role are administrators of Infor EAM Mobile.
9 Locale—Select the default locale for the role.
10 Department—Enter a default department for the role.
11 First Screen—Enter the code identifying the screen to which the system defaults when users of the role log in.
12 Buyer—Select if the user of the role can buy materials or services.
13 Screener—Select if the users of the role can screen work requests.
14 Infor EAM—Select if the user of the role is an Infor EAM user.
15 Infor EAM Requestor—Select if the user of the role is a Requestor user.

   Note: Enter the Requestor user group for User Group to associate the Requestor user with the Requestor user group.

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

   You cannot select Infor EAM and Infor EAM Requestor for the same user; however, you must select either Infor EAM or Infor EAM Requestor.

16 Infor EAM Connector—Select if the user of the role is a Connector user.

17 Infor EAM Barcoding—Select if the user of the role is an Infor EAM Barcoding user.

18 Infor EAM Mobile—Select if the user of the role is an Infor EAM Mobile user.

19 Infor EAM Analytics—Select if the user of the role is an Infor EAM Analytics user.

20 Consumer—Select if the users of the role are Advanced Reporting consumers.

21 Author—Select if the users of the role are Advanced Reporting authors.

22 Requisition—Enter the maximum amount users of the role can enter on a requisition or requisition line.

23 Requisition Approval—Enter the maximum amount users of the role can approve for a requisition or requisition line.

24 Invoice Approval—Enter the maximum amount users of the role can approve on invoices and invoice lines.

25 Non-PO Inv. Approval—Enter the maximum amount users of the role can approve on non-purchase order invoices.

26 Purchase Order—Enter the maximum amount users of the role can enter on a purchase order or purchase order line.

27 PO Approval—Enter the maximum amount users of the role can approve for a purchase order or purchase order line.

28 Pick Ticket Approval—Enter the maximum amount users of the role can approve for pick tickets.

29 Click Save Record. The system saves the record.

Creating Electronic Records and Signatures

The system allows you to create electronic records, or "snapshots," of events that occur in the database. A snapshot preserves the entire record, including information related to other database tables, to provide historical information related to the progress of your operation. For example, a snapshot of a work order header will include all information on the header as well as the associated activities. The system also provides the ability to print and export snapshots to external formats such as Adobe Acrobat Portable Document Format (.PDF).

In addition to creating electronic records of information in the database, you can set up the system to require an electronic signature to authorize status changes to specific records. The electronic signature is attached to an entity, and when a system user changes the status of a record based on specific criteria, the system prompts the user for an ID, password, and a reason for the signature (e.g., review, approval, responsibility, etc.).

You can also select to associate certifications with electronic signatures to facilitate the proper authorization of status changes by requiring authorized users to enter a certification number and certification type when entering their signature, which is required by the Federal Aviation Administration (FAA) for electronic signatures. The FAAMOD installation parameter determines whether you are required to enter a certification number and certification type for electronic signatures. If FAAMOD is set to ON, the system displays Certification Number and Certification Type on the Electronic Signature dialog box and you must enter a valid certification number and type to sign the record. Refer to "Signing Records" on page 62.

Defining Entities for Electronic Records and Signatures

Define entities to take a snapshot of the record or require an electronic signature when you change the status of the record attached to the entity. For example, if your organization requires electronic records of the specific stages of a purchase order, you can define the snapshot for the PORD entity. Or, if your organization requires electronic signatures of status changes to work orders, you can define the electronic signature for the EVNT entity. The system takes the snapshot of the record and/or prompts you (or any user) for an ID, password, and reason when you save the change to the database.

The following table lists the entities for which you can create electronic records and signatures:

Entity	Description	Information Recorded
EVNT	Event	Work order, activities, repairable parts, permits
OBJ	Equipment	Equipment and warranties
RECV	Receipts	Receipt and receipt lines
RETN	Returns	Return and return lines
STOS	Store-to-Store	Store-to-store transaction and lines
PROJ	Project	Project and budget
PICK	Pick Ticket	Pick tickets and lines
PORD	Purchase Order	Purchase order and lines
REQ	Requisition	Requisition and lines
INV	Invoice	Invoice and lines

Follow these steps to define entities for electronic records and signatures.

1   Open the eRecords Setup form. The system displays the List View page.
2   Click New Record. The system inserts a new record and displays the Record View page.
3   Entity—Select the entity for which to define electronic records and/or signatures. The system automatically populates the entity description.
4   Signature Required—Select to indicate that the status change requires a signature.
5   From Status—Enter the old status of the entity.
6   To Status—Enter the new status of the entity.
7   Click Save Record. The system saves the record.

Signing Records

Upon changing the status of a record that has been defined as requiring an electronic signature, the system prompts you to enter a user ID, password, and reason for the signature. The user ID and password are the same ID and password used to enter the system; however, any person with a valid

user ID and password can sign electronic records, even if they are not physically logged in to the system. After verification of the user information, the system takes a snapshot of the record and stores it in the database. If you update multiple records at one time, the system prompts you for a signature for every record.

Follow these steps to sign records.

1 Open any form requiring electronic signatures for status changes.
2 Query for the record for which to change the status. Status changes can include record insertion, deletions, or any specific change as defined on the eRecords Setup form. Refer to "Defining Entities for Electronic Records and Signatures" on page 62.
3 Change the status of the selected record, and then click Save Record. The system displays the eSignature popup.
4 User ID—Enter the user ID.
5 Password—Enter the password associated with the user ID.
6 Signature Type—Enter the reason for the electronic signature, e.g., review, approval, etc. Define signature types for the ESTP entity on the System Codes form. Refer to "Defining System Codes" on page 12 Chapter 1 System Configuration.
7 Certification Number—Enter the unique certification number for the eSignature.
The system automatically populates Certification Type.
8 Certification Type—Modify the certification type as necessary.

Note: The FAAMOD installation parameter determines whether you are required to enter a certification number and certification type for electronic signatures. If FAAMOD is set to ON, the system displays Certification Number and Certification Type on the eSignature popup, and you must enter a valid certification number and type to sign the record. The system automatically populates Certification Type based on the selected Certification Number. Certification numbers and types are associated with employee records on the Qualifications tab of the Employees form. The Qualifications tab is not available in Infor EAM for SQL Server.

The system only displays certification numbers and types that are associated with training records for which the employee is currently qualified in the lookups for Certification Number and Certification Type.

Additionally, the system associates certification numbers and types with employees based on the user group of the employee on the Employees form. Therefore, if FAAMOD is set to ON, you must select a User for each employee who is required to enter a certification number and type when signing electronic records.

9 Click OK. The system verifies the eSignature information.

Important: If you click Cancel, the system closes the form and does not record changes.

The system does not allow changes to the record without entering an electronic signature. Further, if you enter an invalid or expired ID and password, or if you do not enter a valid certification number and type if applicable, or if you do not have status change authorization, the system records an access violation and the electronic signature will not be recorded. If the number of unsuccessful signature attempts exceeds the number specified in the SECUVIOL

> installation parameter, the system locks the user. Contact your System Administrator to unlock users.

Configuring Electronic Records and Signatures for cGMP Equipment

Create electronic records and/or require electronic signatures for work performed on cGMP equipment. Current Good Manufacturing Practices (cGMP) are a set of standards established by the United States Food and Drug Administration (FDA) to regulate the manufacturing processes of the food, pharmaceutical, and medical equipment industries.

Many companies have a combination of equipment regulated by cGMP standards as well as equipment not regulated by cGMP standards. Configure the system to take a snapshot of a record or require an electronic signature only when the work is performed on cGMP equipment.

Note: To indicate that a piece of equipment is subject to cGMP standards, select cGMP on the Record View page of the Assets, Positions, or Systems form. Refer to *Defining Assets*, *Defining Positions*, or *Defining Systems* in Chapter 2 Asset Management of the *User's Guide*.

To configure the system to create electronic records and/or require signatures for only cGMP equipment, set the CGMPONLY installation parameter to YES. Refer to Appendix   Installation Parameters of the *User's Guide*. You must also define the electronic records/signatures for the EVNT entity on the eRecords Setup form. Refer to "Defining Entities for Electronic Records and Signatures" on page 62. If CGMPONLY is set to YES and you have configured electronic records/signatures for the EVNT entity, the system creates an electronic record and/or requires a signature for work orders created/generated only for cGMP equipment.

Note: If you create a PM route that is associated with a work order containing cGMP equipment, the system creates an electronic record and/or requires a signature for the work order associated with the cGMP equipment in the PM route. The system does not create a separate electronic record or require a signature for each child work order on the PM route.

The electronic signatures for cGMP equipment configuration apply to work orders created/generated for cGMP equipment using the following forms:
* Work Orders form
* Work Orders Quick Close form
* Service Requests form
* Generate/Release Work Orders form

Granting Status Change Authorization Permissions

Users have different levels of authority within the system. For example, a manager might have authority to approve purchase requisitions. A planner might have authority to cancel a work order. A project manager might have authority to freeze a project.

Set up authorization levels for entity status values when records for the entity are created or when their status is modified. Set authorization levels for user groups or individual users.

Follow these steps to grant status change authorization permissions.

1 Open the Status Change Authorizations form.

2 Click Add Authorization. The system inserts a new Authorization Details record.

3 User Group—Enter the user group for which to define the status change authorization. Enter * if the authorization applies to all groups.
The system automatically populates the user group description.

Note: User Group and User cannot both have a value of *.

4 User—Enter the user for whom to define the status change authorization. Enter * if the authorization applies to all users in the user group.
The system automatically populates the user description.

5 Entity—Enter the entity over which the user has authority.
The system automatically populates the entity description.

6 From Status—Enter the status code the user can change.
The system automatically populates the from status description.

7 To Status—Enter the status code to which the user can change the old status code.

The system automatically populates the to status description.

Note: If you want the group to have authorization over all aspects of a particular process, enter all of the available status changes for that process. Enter * for any status and - for "No status yet" (i.e., to indicate a new record).

8 User Specific Auth.—Select to indicate that the authorization is for this user only.

9 Click Submit. The system saves the record and updates the Status Change Authorizations list.

Note: To remove an authorization, select the authorization to remove, and then click Remove Authorization. The system removes the record and updates the Status Change Authorizations list.

Interface Configuration

<div style="text-align: right">**3**</div>

This chapter provides information about configuring the Infor Enterprise Asset Management interface. Personalize the Start Center by setting up inbox entries and KPIs. Modify the page layout of record view, detail view, and list-detail view pages. Customize your Operations Overview page to display portlets to quickly access the records that are most important to you. Finally, set up business processes to configure a series of screens into a flow that you can follow.

> **Important:** This chapter describes Infor Enterprise Asset Management functions that only a system administrator has rights to perform.
>
> This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Personalizing the Start Center

Personalize the Start Center to display inbox entries and KPIs. Inbox entries notify you of changes in the database, and KPIs measure productivity or efficiency with processes or work-related activities.

Personalizing the Inbox

The inbox displays notifications (inbox entries) of changes in the system database on the Start Center. An example of inbox entries is the number of work orders with associated warranties for which there have been no claims submitted.

Users can open screens necessary to complete actions or activities associated with inbox entries by double-clicking the inbox entry. For example, launch the Work Orders form directly from the inbox entry to approve the work orders requiring approval. A Dataspy entered for inbox entries automatically searches for and retrieves the records associated with an inbox entry to the called screen.

Inbox entries can be assigned to specific user groups or defined as public entries that are displayed for all users. After personalizing the inbox, set system privileges for users to modify their inbox by adding and/or deleting entries and modifying the order and sequence in which entries are displayed.

Export and Import Configuration

Create an export file for KPIs, inbox items, custom fields, and custom reports using the export configuration feature. Import the files created into another Infor EAM implementation.

Exporting KPIs

Export a set of KPIs to an export file.

Follow these steps to export a set of KPIS to an export file.

1   Open the Export Configuration form. The system displays the Export KPIs page.
    The system does not display any KPI 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. Refer to Dataspy in Chapter 1 Basics in the System Administrator's Guide.
    •   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 . The system displays KPI records that are not Out of Service or Withdrawn. For more information about entering search parameters, refer to Defining Quick Filters on Lookups Chapter 1 Basics in the System Administrator's Guide.
3   Select the KPI to export, and then click Export. The system creates the file and then displays the Save As popup.
4   Select the folder in which to save the file, and then click Save. The system saves the export file.

Configuration Manager

Export Configuration allows users to export a large number of configuration items to a specially formatted file. Import Configuration allows users to import these files.

Exporting Base Configuration

Export a large number of configuration items to specially formatted files.

Follow these steps to export base configuration.

1   Open the Configuration Manager form. The system displays the Export Base Configuration page.
2   Select one of the following options:
    •   Save on Client—Select to save the files on the client's machine.
        The system automatically populates Path on the server where the file will be initially saved.

Note: The export process may take a while to successfully process and the system could timeout during the process. If this happens, click the Status tab to check the results of the import.

- Save on Server—Select to save the files on the server.

  Email Address—Enter the email address to which to have email notifications sent when the configuration process is complete.

  Include file in Email—Select to receive a second email with the file attached.

  The system automatically populates Path on the server where the file will be initially saved.

  Note: Click Select All to select all of the export options.

3 User Groups and Permissions—Select to export user groups and their permissions, including hyperlinks, screen designer changes, and menus.

4 Export Single User Group—Enter a single user group to export. Only permissions for this user group will be included in the export file.

5 Status Authorizations—Select to export status authorizations.

6 Users—Select to export users and their related organizations, including personal Dataspies and report filters.

7 Organizations—Select to export organizations.

8 Multi-org Security—Select to export multi-org security.

9 Install Parameters—Select to export install parameters.

10 Audit Setup—Select to export audit setup.

11 Screens and Reports—Select to export screens and reports, including changes made to existing screens and any new screens. New reports are not included.

12 Departments—Select to export departments.

13 Locales—Select to export locales.

14 Custom Fields—Select to export custom fields, including classes.

15 Flex SQL—Select to export Flex SQL.

16 Updated Text—Select to export updated text.

17 System Codes—Select to export system codes.

18 Infor EAM Mobile—Select to export Infor EAM Mobile configuration settings.

19 Messenger Setup—Select to export messenger setup.

20 KPIs and Inboxes—Select to export KPIs and Inboxes.

21 Account Detail Setup—Select to export account detail setup.

22 Data Collection Setup—Select to export data collection setup.

23 eRecord Setup—Select to export eRecord Setup.

24 Click Export. The system creates the file, and then displays the Save As popup.

25 Select the folder in which to save the file, and then click Save. The system saves the record in .XML format.

Screen Designer

Modify the page layout of record view, detail view, and list-detail view pages. You can move fields, modify the display type of fields, and rename field labels.

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.

Function	Shortcut
Save layout	CTRL+S
Open group selection	CTRL+G
Switch to preview mode	CTRL+W
Switch to screen designer mode	ALT+E
Exit screen designer mode	CTRL+I

Defining Grids

Create a new grid or copy an existing grid and modify the grid definition. A grid can be added to the menu as a new screen or as a tab on another form.

⭐ **Important:** To define grids that all users can see, you must be logged in as the R5 user.

Follow these steps to define grids.

1 Open the Grid Designer form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Grid Name—Enter the name of the grid, and then enter a description in the adjacent field.

   Note: Names of List type grids must be six characters in length, with 'U' as the second letter. Names of Tab type grids must be three characters in length and begin with 'X'.

4 Copy From—Enter an existing grid to copy.
   The system populates Description, Grid Type, Parent Screen, Parent Screen description, FROM Clause, WHERE Clause, and SELECT Statement.
5 Grid Type—Choose one of the following options:
   • List View
   • Tab
   • Alert Management

6 Parent Screen—Enter the parent screen for the grid if the new grid will be added as a tab on an existing form if Grid Type Tab is selected.
The system automatically populates parent screen description.

7 FROM Clause—Enter the FROM Clause for the grid, including each table and table alias.

8 SELECT Statement—Enter the SELECT Statement for the grid. On the Record View page, fields can be selected only from the lookup. To modify the fields selected or to add fields and functions expressions individually, click the Fields tab.

9 WHERE Clause—Enter the WHERE Clause for the grid, including parameters as necessary.

10 Enable Custom Field Selection in Dataspy—Select to enable custom field selection in the dataspy for the grid.

11 Mobile Grid—Select to set the grid as a Mobile grid on the Record View page.

12 Custom Field Table—Enter the custom field table used for the dataspy lookup for the grid if custom field selection is enabled.

13 Active—Active is selected if the grid has been validated on the Validation page.

14 Click Save Record. The system saves the record.

Defining Fields for Grids

Define fields for grids to modify the SELECT statement for the grid. Fields in the SELECT statement can be true fields or function calls (including parameters).

Follow these steps to define fields for grids.

1 Open the Grid Designer form. The system displays the List View page.

2 Select the grid for which to add fields, and then click the Fields tab. The system displays the Fields page.

3 Click Add Field. The system inserts a new Field Details record.

4 Field—Enter the field to add to the grid.

   Note: Lookup Dataspies allow you to choose the following:
   • fields from the tables in the FROM clause
   • any fields in the whole database including any you created
   • functions

5 Alias—Enter the alias for the field.

   Note: Field Alias can include only letters, numbers, and '_'. The same Field can be added twice if it appears in two different tables, but only with a different field alias each time.

6 Header Location—Choose one of the following options to display a field in the header section above the grid:

   Note:

- None
- Code
- Description
- Header 1
- Header 2
- Header 3

7 Field Label—Enter the label for the field.

8 Data Type—Choose one of the following options:
- Upper Case
- Mixed Case
- Numeric
- Date
- Currency
- Decimal
- Date/Time
- Duration
- Time
- Boolean
- Long
- Dependent

9 Lookup Entity—Enter the entity used to populate the Dataspy lookup for the field.
The system automatically populates entity description.

10 Lookup Query—Enter the query used to populate the Dataspy lookup for the field.
The system automatically populates Lookup Query Text.

11 Grid Key—Select to identify the field as a key field for the grid.

12 Click Submit. The system updates the record.

Note: To remove a Field for a grid, select the Field to remove, and then click Remove Field. The system removes the record and updates the Fields list.

Defining Parameters for Grids

Map parameters to fields on parent screens for user-defined grids with Grid Type = Tab. This tab shows both system parameters and user-defined parameters from SELECT and WHERE statements.

Follow these steps to define parameters for grids.

1 Open the Grid Designer form. The system displays the List View page.

2 Select the grid for which to define parameters, and then click the Parameters tab. The system displays the Parameters page.

3 Select a parameter to map to the parent screen.
The system automatically populates Parameter, System, and Data Type.

4 Parent Grid Field—Enter the parent screen field for the parameter. For example, map parameter :wonum to WO No. on the Work Orders form when adding a new tab with child records to that form.

5 Click Submit. The system updates the record.

Defining Validation for Grids

Define a default Dataspy for a grid, and then mark the grid as active.

Follow these steps to define validation for grids.

1 Open the Grid Designer form. The system displays the List View page.

2 Select the grid to validate, and then click the Validation tab. The system displays the Validation page.

3 Click Create Default Dataspy. The system validates the full query statement for the grid record and creates the default dataspy for the new grid as "All records".

4 Active—Select to validate the grid definition and make the grid available for use.

Note: If you unselect Active, the system saves the record and makes the grid inactive.

Managing Portlets

Portlets are a concise list of records that are sorted and arranged to match your specifications using pre-existing, modified, or new Dataspies. You can view the current status of work requests or requisitions that you have submitted as well as instantly access records that require your approval from a single screen. By customizing your Operations Overview page to display portlets, you can quickly access the records that are most important to you.

Setting Up HTML Content

Follow these steps to set up HTML content.

1 Open the HTML Content Setup form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

3 Name—Enter the title name to use for the portlet selection and window.

4 URL—Enter the URL of the content.

5 Horizontal Size—Select the horizontal size of the portlet window.

  • Single—Approximately 1/3 of screen width

  • Double—Approximately 2/3 of screen width

- Triple—Approximately full screen width

6 Vertical Size—Select the vertical size of the portlet window.

- Single—Approximately 1/3 of screen height
- Double—Approximately 2/3 of screen height
- Triple—Approximately full screen height

7 ClickSave Record. The system saves the record.

Adding List Portlets

Specify the list portlets to display on your Operations Overview form.

Follow these steps to add list portlets.

1 Open the Operations Overview form.
2 Click New Record. The system displays the Add Portlet popup.
3 Portlet Type—Select List to display the portlet content in a list view. The system displays two additional fields.
4 Source Name—Select the source of the portlet content.
5 Dataspy Name—Select the Dataspy for which to display the portlet content.
6 Click Save. The system closes the popup and displays the portlet.

Adding HTML Content Portlets

Specify the HTML portlets to display on your Operations Overview form.

Note: You must set up the HTML content before adding an HTML content portlet. Refer to Setting Up HTML Content.

Follow these steps to add HTML content portlets.

1 Open the Operations Overview form.
2 Click New Record. The system displays the Add Portlet popup.
3 Portlet Type—Select HTML Content to display the portlet content in an HTML view. Infor EAM displays one additional field
4 Source Name—Select the source of the portlet content.
5 Click Save. The system closes the popup and displays the portlet.

Adding Analytics Graph Portlets

Specify the graph portlets to display on your Operations Overview form.

Follow these steps to add analytics graph portlets.

1 Open the Operations Overview form.

2 Click New Record. The system displays the Add Portlet popup.

3 Portlet Type—Select Analytics Graph to display the portlet content in a graph view. The system displays two additional fields.

4 Source Name—Select the source of the portlet content.

5 Horizontal Size—Select the size for which to display the portlet.

6 Click Save. The system closes the popup and displays the portlet.

Deleting Portlets

Follow these steps to delete portlets.

1 Open the Operations Overview form.

2 Click ▣ on the header of the portlet to delete. The system deletes the portlet and rearranges the Operations Overview page.

Assigning a New Dataspy to a Portlet

Select a new Dataspy to associate with a portlet.

Follow these steps to assign a new Dataspy to a portlet.

1 Open the Operations Overview form.

2 Click Editon the portlet containing the Dataspy to edit. The system displays the Add Portlet popup.

3 Dataspy Name—Select a different Dataspy from the drop-down list.

4 Click Save. The system closes the popup and displays the portlet with the new Dataspy.

Navigating to a List View or Record View From a Portlet

Quickly open a list view or a specific record from a portlet.

Follow these steps to navigate to a list view or record view from a portlet.

1 Open the Operations Overview form.

2 Choose one of the following options:

• *Open a specific record from the list of records in the portlet*—Double-click the row containing the record to display. The system displays the record on the corresponding Record View page.

• *Open a complete list of the records*—Click >>> on the portlet footer. The system displays the results of the Dataspy on the corresponding List View page.

Setting Up Business Processes

Set up business processes to configure a series of screens into a flow that you can follow. After the initial business process setup, define which screens appear in the flow and in what order.

Note: Only systems administrators should set up screen flows.

Follow these steps to set up business processes.

1 Open the Business Process Setup form.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Business Process Code—Enter the code that identifies the business process flow. The system populates the description. Edit the description if necessary.

   The system automatically populates Sequence Number.

   Note: Changes made to the description are permanent for the specified business process code and affect all instances of the business process code.

   When you create or modify the descriptionand/or Icon for a business process code that is already in use, the system updates all other records associated with the business process code to have the description and/or icon.

4 Icon—Enter the icon to associate with the business process code. You must include the image file extension.
5 Sequence Number—Enter the sequence number to associate with the business process code.
6 Screen—Enter the screen to associate with the business process code.
7 Click Save Record. The system saves the record.

Setting Up Alternate Flows for a Business Process

Create alternate flows within a business process.

Follow these steps to set up alternate flows for a business process.

1 Open the Business Process Setup form. The system displays the List View page.
2 Select the screen for which to set up alternate flows, and then click the Alternate Flows tab. The system displays the Alternate Flows page.
3 Click Add Record. The system inserts a new Alternate Flow Details record.
4 From Sequence—Enter a sequence number for the starting point in the alternate flow screen sequence.
   The system automatically populates the from sequence description.
5 Then Sequence—Enter a sequence number for the next point in the alternate flow screen sequence.
   The system automatically populates the then sequence description.
6 Else Sequence—Enter a sequence number for the final point in the alternate flow screen sequence.
   The system automatically populates the else sequence description.

7 Click Edit If Statement to add or edit the If conditional statement. The system displays the Filter Condition popup.

Note: Refer to *Specifying Data Criteria* in Chapter 1 Basics of the *Infor EAM User's Guide* for more information about selecting an operator or adding parentheses.

When a business process is initiated with alternate flows, if the If conditional statement is true, the system moves to the screen specified in Then Sequence.If the If conditional statement is false or null, the system moves to the screen specified in Else Sequence.

8 Click Submit. The system saves the record and updates the Alternate Flows list.

Note: To remove a record, select the record to remove, and then click Remove Record. The system removes the record and updates the Alternate Flows list.

Setting Up Hyperlinks

Create or edit hyperlinks to connect a form to another form. Hyperlinks allow access to related forms or reports from a link on the original form.

Follow these steps to set up hyperlinks.

1 Open an Infor EAM form. The system displays the List View page.
2 Select a record, and then click the Record View tab. The system displays the Record View page.
3 Click Screen Designer. The system displays the calling screen in Screen Designer mode.
4 Right-click in a field, and then choose Hyperlink. The system displays the Hyperlink popup.
The system automatically populates Source Screen Name and Source Field Name.
5 Hyperlink—Enter a unique name for the hyperlink.
6 Destination Screen Mode—Select to set hyperlink as query pages or to set hyperlinks to display in insert mode.
7 Destination Screen/Report—Enter the name of the hyperlink screen or report.
The system automatically populates the destination screen/report description.

Note: If you select a report for Destination Screen/Report, the system empties and protects Default Dataspy. The system also selects Query for the Destination Screen Mode and protects the Destination Screen Mode options.

8 Destination Field—Select the field for which to create a hyperlink.
9 Sequence Number—Enter the sequential order for the hyperlink.
10 Default Dataspy—Select the global dataspy for the hyperlink.
11 Click Submit. The system creates a hyperlink record for the selected field.

Screen Designer for Web Service Prompts

Modify the layout of screens and properties of web service prompt fields. In addition, you can select the groups for which the changes apply. While tab sequence and display properties are established initially on the Fields page for Web Service Prompts, fields can be moved around the screen and display types can be changed using the screen designer feature. Refer to *Screen Designer* in Chapter 1 Basics.

Note: Re-sequencing fields via screen designer may cause the prompt to function differently than the administrator originally intended. Exercise caution when re-sequencing fields via screen designer.

The following functionality is specific to screen designer for web service prompts:

1   If you have access to the screen designer feature on system delivered screens, you also have access to screen designer on web service prompt screens.
2   Make screen design changes with caution as certain changes can adversely affect the intended behavior of the screen. For example, if you move a controlling organization or class/class organization field to the bottom of a prompt, the system may not display any class-specific custom fields until the entire prompt has been navigated.
3   Any field-level changes on the Web Service Prompt Definition form overwrite the corresponding field on the Prompt form for all groups when the screen is next opened, regardless of changes made via screen designer. For example, creating and updating prompt definitions impact the corresponding screen for all user groups.
4   Hyperlinks are not available.
5   "User Defined Field Options" and "User Defined Field Lookup Values" right-click options are not available.
6   The "Not Available" attribute is not available.
7   The "View Field Details" option is not available.
8   When editing field names, translating to other languages is not available.
9   Lookup Filters can be applied only to user defined fields. In addition, the user defined field must have the lookup defined on the base screen for which the web service is related.
10 There is no web service prompt screen designer option for links and generic buttons as these cannot be displayed on a web service prompt-based screen.

Defining Web Service Prompts

Define web service prompts representing web services and fields rendered on the user-defined screen using the Web Services Prompt Engine. System administrators can use web services to create user-defined screens for use within Infor EAM. Web service prompts contain the definitions for these screens.

The following rules apply to forms for which web service prompts are available:

• The system displays the functions of all system-delivered Infor EAM List View and Record View pages.
• BSCOMM (Comments) is displayed.

- No user-created screens are available.

The system displays all screens meeting the above criteria if a web service has not been specified; otherwise, only screens related to the web service will be displayed.

Follow these steps to define web service prompts.

1 Open the Web Service Prompts form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Web Service Prompt—Enter a unique code for the web service prompt, and then enter a description of the prompt in the adjacent field.
4 Out of Service—Select to indicate the web service prompt is out of service.
5 Click Save Record. The system saves the record.

   Note: The system automatically creates a screen record whose code and description correspond with the web service prompt. The user-defined screen can now be placed into the menu for one or more user groups. These new screens are not visible on the Screens form.

Defining Web Services for Web Service Prompts

Define the Infor EAM web services available for use on the user-defined screen representing the selected web service prompt.

Follow these steps to define web services for web service prompts.

1 Open the Web Service Prompts form. The system displays the List View page.
2 Select the web service prompt for which to define web services, and then click the Web Services tab.
   The system displays the Web Services page.
3 Click Add Web Service. The system inserts a new Web Service Details record.
4 Screen—Enter the screen for which to define web services details. The system automatically populates the screen description.
5 Tab—Enter the tab to be specified for the selected screen.
   The system automatically populates the tab description.

   Note: Tab should be left blank if the web service is to be based on the Record View of the selected Screen.

   If the Comments Tabis selected, the system replaces the selected Screen with BSCOMM and clears the Tab value because the insert, update, and delete Comment web services do not actually reside on the Comments tab. These web services exist on the Comments pop-up (BSCOMM), a screen within Infor EAM. Because Comments are generic and can apply to many screens, the Entity and Record for which the Comments are related need to be entered when inserting, updating, or deleting Comments using the Web Service Prompt Engine. The system administrator can make the Entity field 'fixed' via Field Type and supply the correct Entity value so that it is not necessary to enter it with each Comment record. In addition, the Entity field can be 'protected' via Display Type so that users can only enter Comments for the appropriate Entity.

6 Action Code—Select the action code for the selected screen, e.g., insert, update, delete.

7 Process Group—Enter the process group for the selected screen. Fields related to the lowest process group will be displayed first on the Web Service Prompt Engine, and so on. The default value for this field is based on the INCRLINO installation parameter.

8 Web Service—Enter the web service for the selected screen.

Note: The system defaults the Web Service if only one Web Service exists for the Screen, Tab, and Action Code.

If you enter the Web Service without entering Screen, Tab, and Action Code, the system populates Screen, Tab, and Action Code when the Web Service is selected.

9 Click Submit. the system saves the record.
The system automatically creates a field record on the Fields tab for each controlling organization in the selected web service. Controlling Org. will be selected for these records.

Note: In determining the sequence for Controlling Org. for each process group/web service, the system multiplies the value in the WSPFSEQ parameter by the web service process group. This new parameter will be used as a multiplier to ensure adequate field sequence separation between web services defined for the prompt allowing users to add the remaining prompt fields as necessary. The default value for this parameter is 100.

Defining Fields for Web Service Prompts

Add, update, or delete fields for each web service that will be available on the Web Services Prompt.

Fields available for use will be those related to the web services defined on the Web Services page of the Web Service Prompts form.

Note This form contains no capability for defining language translations for field labels displayed. When the prompt is executed, field labels display as entered on the Fields form for the selected web service prompt. To display prompts in multiple languages, a separate Web Service Prompt must be created for each language.

User defined fields are available for web service prompts. The fields display in a list of all fields under the appropriate web service for some insert/update web services. These user defined fields inherit properties from the associated reference form. Right-click in Screen Designer mode to define options for user defined fields. When you highlight a user defined field in the grid, the system protects Field Type and Query Code. This information is defined on the base screen for which the web service is related. Refer to Entering User Defined Fields Chapter 1 Basics.

Entity lookup user defined fields show records for all organizations in the user's organization list when a controlling organization is not available. A record cannot be submitted if the controlling organization and the user defined field organization are in conflict.

Follow these steps to define fields for web service prompts.

1 Open the Web Service Prompts form. The system displays the List View page.

2 Select the web service prompt for which to define fields for web services, and then click the Fields tab. The system displays the Fields page.

3 Click Add Field. The system inserts a new Field Details record.

4 Process Group–Web Service—Enter the process group for which to add the web service field. The system automatically populates Screen and Tab.

5 Field—Enter the field to add to the process group. Available fields are based on the selected web service.

6 Field Label—Enter the name for the field. This information will be displayed as the field boiler text for the Web Services Prompt Engine. The default Field Label is equivalent to the Field.

7 Field Type—Enter the field type based on the selected field and web service. The default Field Type is the system-delivered type for the selected Field. However, you may change this value. The system displays the user-defined Field Type on the Web Service Prompt Engine. You can change the default to one of the following options:

- Alphabetic
- Computed
- Date
- Fixed
- Free format text
- Key Field
- Numeric
- Retrieved Field

Note: Key Field is available only when an "update" or "delete" web service is selected. When setting up a web service prompt that uses an update and/or delete web service, the system administrator must create a Field for each key field the web service requires to uniquely describe a record. Field Type should be Key Field. The web service prompt engine first prompts you to enter the key field value(s) for the record to process, i.e., Equipment and Equipment Organization. For updating web services, the system queries for the record to display the results. You may update and then submit the record. For deleting web services, after you enter all key field values, the system deletes the record.

Retrieved Field is available only when an "insert" web service is chosen. When setting up a web service prompt that uses an insert web service, one or more key field values must be retrieved from a web service previously processed in the current prompt record. The administrator needs to create a Field of type Retrieved Field for each of the key fields. For example, a web service prompt is created that allows you to create a work order and an activity for the work order simultaneously. You want the activity to be associated with the work order that is created in a previous process group; however, the data will be entered into the web service prompt engine and processed simultaneously. To ensure the activity is associated with the correct work order, the system must first process the "insert" work order web service, then pass (retrieve) the work order number and work order organization back to the create activity web service. This key field information, along with other required activity data, is used to create the activity and relate it to the proper work order. Retrieved Field (Field Type = Retrieved Field) records would be created for the activity work order number and activity work order organization because the work order number and organization are required to associate the activity.

Retrieve From Process Group–Web Service should be populated with the web service from which these key field values are retrieved. In this example, they are retrieved from the "insert" work order web service. Retrieve Field will be the key field in the retrieve from web service from which the data is retrieved. In this example, WO Number is one of the retrieved fields. Another Field should be created similarly to define how to retrieve the work order organization for use in creating the activity. Field values can only be retrieved from web services with a lesser process group number, i.e., a value cannot be retrieved for use in the current web service unless a previous web service was processed to provide the information.

Retrieved Field and Key Field are not available when Unmapped is checked.

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

If a field is defined as Checkbox, it appears as a checkbox on the Web Service Prompt Engine page.

8   Display Type—Enter how the field will be displayed using the Web Service Prompt Engine. The default value will be the system default for the selected field. The user can change the default to one of the following options:

- Optional
- Required
- Hidden
- Protected

Note: If Field Type is Fixed or Computed, only Protected and Hidden will be available for Display Type.

If Field Type is Retrieved Field, only Hidden will be available for Display Type.

9   Sequence—Enter a numeric value for the sequence. Fields are displayed using the Web Service Prompt Engine in ascending order by their Sequence. The default value provided by the system is based on the INCRLIND parameter.

Note: It is important to ensure that the web service prompt fields are displayed grouped together, using the Web Service Prompt Engine, by Process Group–Web Service. The system controls the Sequence range available for fields for the selected Process Group–Web Service. The Sequence must not overlap with a Sequence associated with a previous or subsequent process group, i.e., web service prompt fields are grouped on the Web Service Prompt Engine by Process Group–Web Service, then by Sequence.

10 Minimum Length—Enter the minimum number of characters for the field.

11 Maximum Length—Enter the maximum number of characters for the field.

12 Next Sequence—Enter the number at which to begin the next sequence.

13 Query CodeEnter the query code. The Query Code defines values available for selection in a list of values field when a server connection is available, i.e., the query and list of available values will be based on the Infor EAM tables.

14 Mobile Query Code—Enter the mobile query code that defines a list of values that is available for the field.

Note: The mobile device uses the Query Code list of values if an application server connection exists; otherwise, the Mobile Query Code list of values is used, i.e., local data populates the list of values.

15 Retrieve Field—Enter the name of the field from which to retrieve data.
The system automatically populates Retrieve From Group–Web Service and Retrieve Field X-Path.

16 Query Web Service—Enter the query web service. A Query Web Service applies only when defining key field for an "update" web service. The Query Web Service is used to query the data in the record to display to the user for possible updates.
The system automatically populates Query Field X-Path.

17 Unmapped Field—Select if specified field is not mapped to any field in web service. The field value can then be processed further by the Prompt as part of a calculation or retrieved values.

18 Use Previous Value—Select to use the previous field value.

19 If Data Is—Enter the Go To condition. This field describes the condition in which the system does not access the field defined by Next Sequence but instead places focus on the Go To Sequence.

20 Pattern—Enter the pattern that should be met for the Go To condition.

21 Go To—Enter the field sequence that the system will follow, versus Next Sequence, if the condition is met.

22 Clear Previous Values Starting From Go To Target Field—Select to enable the system to carry forward values for fields with Use Previous Value selected, when the prompt sequence is less than (<) the "Go To" target field sequence (i.e. previous values for prompt fields >= "Go To" target field sequence will be cleared). Otherwise, the system will carry forward values for fields with Use Previous Value selected, when the prompt sequence is less than (<) the "Go To" source field sequence (i.e. previous values for prompt fields <= "Go To" source field sequence will be cleared).

23 Retrieve From Group–Web Service—Enter the web service from which key field values will be returned and used in a subsequent process group.
The system automatically populates Field X-Path.

24 Computed Data—Enter the computed data for the field when Field Type is Computed.

25 Pattern Match—Enter a pattern for Field Type of Alphabetic for which entered data must match in order to be valid.

Note: The system also supports the following "wild card" characters when defining a Pattern Match:

- . (period): single alphabetical characters, A through Z
- # (pound sign): any single number, 0 through 9
- _ (underscore): any single alphanumeric character, A through Z and 0 through 9
- % (percent): a string of alphanumeric characters
- , (comma): OR condition
- : (colon): THROUGHOUT condition
- ! Any character(s) or numbers(s): data entered should not match what follows the "!" NOT condition.

Refer to Defining Retrieved Values for Web Service Prompts for more information on referencing the prompt field inside SQL statements contained within Query Code, Mobile Query Code, and Computed.

26 Click Submit. The system saves the record.

> **Note:** To remove a field, select the field to remove, and then click Remove Field. The system removes the field and updates the Fields list. Fields corresponding to the Controlling Organization for a web service cannot be removed from this page because they are critical to processing the web service. However, if the web service itself is removed from the Web Service page, the system automatically removes all related fields including Controlling Organization.

> ⭐ **Important:** This page does not display errors if all necessary required, key, or retrieved fields are not defined for the web service prompt to function properly using the Web Service Prompt Engine. An error is displayed when the Web Service Prompt Engine processes records with insufficient prompt fields. An error also displays from the Web Service Prompt Engine if a next sequence is defined that does not exist within the prompt definition.

Defining Retrieved Values for Web Service Prompts

Create, edit, and delete retrieved values for a web service prompt. Values can be retrieved from the database and automatically populated into the Destination field when you enter data into the Source field. Using retrieved values saves data entry time and prevents potential key stroke mistakes.

A good example for using retrieved values would be when an employee regularly creates a work order and activity for which they will complete. When the employee enters his or her user name for the work order Created By field, the system can locate the employee associated with the entered user name and populate that employee's Trade on the activity automatically.

> ⭐ **Important:** Setting up retrieved values requires identifying the Source, the Destination, and the SQL Statementused to query the information related to the supplied data. SQL statements can be defined on the Queries screen.

Follow these steps to define retrieved values for web service prompts.

1 Open the Web Service Prompts form. The system displays the List View page.
2 Select the web service prompt for which to define retrieved values, and then click the Retrieved Values tab. The system displays the Retrieved Values page.
3 Click Add Retrieved Value. The system inserts a new Retrieved Value Details record.
4 Source—Enter the source field sequence. The system automatically populates the source description.
5 Destination—Enter the field sequence for which to populate the retrieved data. The system automatically populates the destination description.
6 Query Code—Enter the query code on which the retrieved value will be based.
The system automatically populates SQL Statement.

Note: The system allows referencing other prompt fields inside the user-defined SQL statement. The syntax is ":<prompt sequence #>. For example, if you want to reference a prompt field whose Sequence = "2" inside the 'where' clause of their SQL statement, enter ":2".

7 Click Submit. The system saves the record.

Note: To delete a retrieved value, select the value to delete, and then click Delete Retrieved Value. The system deletes the record and updates the Retrieved Values list.

Copying Web Service Prompts

The copy web service prompt feature copies a web service prompt, including all details.

Follow these steps to copy web service prompts.

1 Create a web service prompt. Refer to "Defining Web Service Prompts" on page 78.
2 Right-click, and then select Copy Web Service Prompt. The system displays the Copy Web Service Prompt popup.
3 New Web Service Prompt—Enter the name for the new web service prompt.
  The system automatically populates the New Web Service Prompt description.
4 Select the record types to copy, and then click Submit. The system copies all web service prompt details to the new web service prompt.

Note: Some exceptions apply to the header details copied.

Out of Service value is not copied.

If the detail record contains a Query Code or Mobile Query Code that is not valid at the time the record is copied, the system does not copy the record.

Viewing Log Files

View and save Infor EAM log and configuration files. Saved files are copied to a specified location on the local drive.

Follow these steps to view log files.

1 Open the View Log Files form. The system displays the Details page.
2 File Type—Choose one of the following options:
  • All
  • Log
  • Configuration

3 Log Type—Choose one of the following options:
  • Ejcron

- Session
- Session List
- Server
- Grid Query
- Apache
- Report
- Axis

4 Click Display Files.
The system automatically populates File Name, File Type, and Log Type.

5 Select—Click to select the files to save.

Note: If multiple files are selected, the system automatically compresses and saves them as one file.

6 Click Save. The system creates the file and then displays the Save As popup.

7 Select the folder in which to save the file, and then click Save. The system saves the record in .XML format.

Reports Configuration

4

Define new parameters for existing reports, modify parameters for existing reports, or create entirely new reports.

> ⭐ **Important:** This chapter describes Infor Enterprise Asset Management functions that only a system administrator has rights to perform. For more information about basic reports functions, refer to Chapter 9 Reports in the *User's Guide*.
>
> This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Creating Reports

Author users can create new reports by passing Infor EAM parameters to external report applications. Only system administrators should create new reports because the process involves modifying critical Infor EAM features.

After creating a report, define the report parameters and generate the authored report.

Note: Infor EAM reports do not support numbers with more than 16 digits.

Follow these steps to create reports.

1 Open the Reports form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Report—Enter a unique code identifying the report, and then enter a description of the report in the adjacent field.
4 Class—Enter the class of the report.
5 File Name—Enter a name for the report definition file.
6 Click Save Record. The system saves the record.

Defining Report Parameters

After creating a report, define new report parameters or modify the properties of system-supplied report parameters as necessary.

Note: Infor EAM reports do not support numbers with more than 16 digits.

Follow these steps to define report parameters.

1. Open the Reports page. The system displays the List View page.
2. Select the report for which to define parameters, and then click the Parameters tab. The system displays the Parameters page.
3. Click Add Parameter. The system inserts a new Parameter Details record.
4. Line—Enter the sequence number of the report parameter.
5. Parameter—Enter the parameter value for the report.
6. Data Type—Select the data type of the parameter, e.g., character, data, numeric, etc.
7. Length—Enter the maximum length of the parameter.
8. System Screen—Enter the code of the entity that corresponds to the report parameter.
9. Type—Enter the code of the type entity that corresponds to the report parameter.
10. Parameter Default or Radio Button Default—Enter the default value of the parameter.
11. Custom Label—Enter a custom name for the parameter to be used on the Report Parameters page.
12. Mandatory—Select to make the parameter mandatory.
13. Uppercase—Select to enforce uppercase characters for the parameter.
14. Remember—Select to carry over a remembered value (from a preceding screen) as a default value.
15. Click Save Record. The system saves the record.

   Note: To delete a parameter, select the parameter to delete, and then click Delete Parameter. The system deletes the record and updates the Parameters list.

Defining Text for Reports

After creating a report, define text for form names, tab labels, and field labels.

Follow these steps to define text for reports.

1. Open the Reports form. The system displays the List View page.
2. Select the report for which to define text, and then click the Text tab. The system displays the Text page.
3. Select a text label from the grid.
   The system automatically populates the text details.
4. Text—Enter a new text label.
5. Click Submit. The system saves the record and updates the Text list.

Generating Authored Reports

After creating a report and defining the report parameters, generate the authored report. Only Consumer and Author users can generate an authored report.

Note: Before generating an authored report, add the report to the system menu bar. Refer to *Setting Up Menus for User Groups* Chapter 2 System Security of the *Infor EAM System Administrator's Guide*.

Follow these steps to generate authored reports.

1 Open the report to generate.
2 Enter the report parameter criteria for the report as necessary. The parameters displayed are those defined on the Parameters page of the Reports form.

   Note: You must use the same parameter name on the report as is specified on the Parameters page of the Reports form. Otherwise, when running the report, the system will display the Parameters page instead of generating the report.

3 Click Print Record. The system generates the report.

Administrative Reports

Generate reports related to administrative functions. Refer to Chapter 9 Reports in the Infor EAM User's Guide for information about generating reports and saving report parameters.

Access Violations

Description

Displays a list of access violations per user during a given time period. Access violations occur when users enter incorrect passwords on the login page.

Menu Path

Administration > Reports > Access Violations

Parameters

Enter the User ID for whom to generate the report, or leave the field blank to generate the report for all users.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type

Consumer

Audit Log

Description

Displays a list of audited status changes

Menu Path

Administration | Reports | Audit Log

Parameters

Table—Enter the table for which to generate the list of audited status changes. Table is a required field.

Key Field 1—Enter the field within the selected table. Key Field 1 is a required field.

Key Field 2—Enter the field within the selected table.

Report Type

Consumer

Electronic Records

Description

Displays a list of snapshots including the parent and child record

Menu Path

Administration | Reports | Electronic Records

Parameters

Enter the Organization, Entity, and Entity Code.

Report Type

Consumer

List of Documents

Description

Displays a list of documents and their information

Menu Path

Administration > Reports > List of Documents

Parameters

Enter the Organization, Document, Description, Class, and File Location for which to view documents.

Report Type

Consumer

List of Electronic Records

Description

Displays a list of electronic signature records

Menu Path

Administration > Reports > List of Electronic Records

Parameters

Enter the Organization, Entity, and Entity Code.

Report Type

Consumer

List of Functions

Description

Displays a list of functions and their information

Menu Path

Administration > Reports > List of Functions

Parameters

Enter the Class and Function for which to view function information.

Report Type

Consumer

List of Infor EAM Codes

Description

Displays a list of Infor EAM entity codes

Menu Path

Administration > Reports > List of Infor EAM Codes

Parameters

Enter the Entity for which to view Infor EAM code information.

Report Type

Consumer

List of Tampered Records

Description

List of records that have been altered abnormally or tampered

Menu Path

Administration > Reports > List of Tampered Records

Parameters

Enter the Organization and Entity.

Start Date and End Date—Enter the starting and ending date for which to retrieve data.

Report Type

Consumer

User Group Configuration

Description

Displays a list of users in each user group and the screen or report permissions specified for the user group

Menu Path

Administration > Reports > User Group Configuration

Parameters

Enter the User Group for which to view user and group information.

Screen/Report—Enter the screen or report for which to display permissions and field attributes.

Note: Enter % after the Screen/Report name to display permissions for the entire form, including all tabs on the form. For example, enter WSJOBS% to display permissions for the Work Orders form, including the Activities, Book Labor, Schedule Labor, etc. tabs.

Show Permissions—Select to display the general permissions for the screen or report.

Show Field Attributes—Select to display all components of the screen or report and the attributes for each.

Show Status Authorizations—Select to display the status change authorizations for the users in the user group.

Show WO Authorizations—Select to display the work order authorizations per work order type.

Report Type

Consumer

Data Collection

5

The data collection module enables you to track the movement of goods for asset and maintenance management. Define queries using existing Infor Enterprise Asset Management data or SQL statements. Use transaction prompts to define where and in what order the data collection module populates information in the system. View scanner transactions to be processed and set up predefined jobs. Finally, correct transaction errors.

> ⭐ **Important:** This chapter describes Infor Enterprise Asset Management functions that only a system administrator has rights to perform.
>
> This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Overview

The data collection module speeds the system acquisition of business information by offering shortcuts in the form of scanned input, minimized operator activity, and system-generated prompts to guide users to accomplish a system function quickly. The data collection module reports on the movements and activities of the organization's equipment, including recording locations and modifications to equipment, thus serving as an audit trail for an asset's lifecycle. The data collection module can be a valuable tool for businesses seeking to take charge of their serialized assets and to enhance their financial reporting on difficult-to-manage item movements.

The following diagram illustrates the flow of data to and from the data collection device and among the system tables:
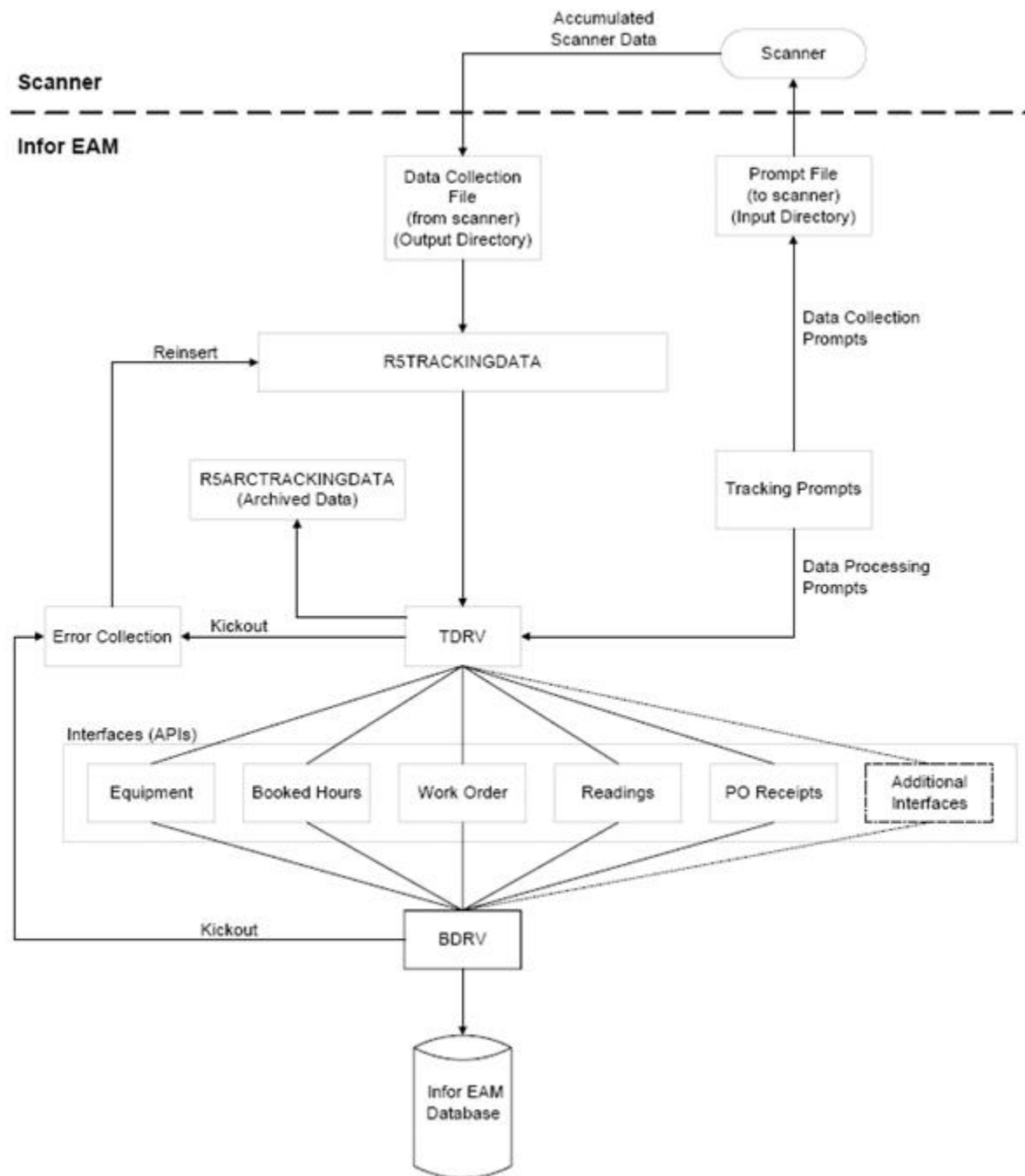
Defining Queries

Define queries using existing Infor EAM data or SQL statements. Use SQL statements to define complex validation queries or validation queries to multiple system tables.

Note: Define this type of validation only if you are familiar with the Infor EAM data model and have a good working knowledge of SQL.

Follow these steps to define queries.

1 Open the Queries form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Query—Enter the code for which to define a query.
4 SQL Statement—Enter the SQL statement.

   Note: To verify the SQL Statement, click Test SQL. The system displays a message indicating the accuracy of the statement.

5 Normal—Select if you want this query to appear in the Normal lookups.
6 Data Collection —Select if you want this query to appear in the data collection lookups.
7 Lookup—Select if you want this query to appear in all lookups.
8 KPI—Select if you want this query to appear in the KPI lookups.
9 Inbox—Select if you want this query to appear in the Inbox lookups.
10 Click Save Record. The system saves the record.

Defining Transaction Prompts

Transaction prompts define where and in what order the data collection module populates information in the system. You can validate incoming data at the field level, as well as at conditional navigation between prompts.

Referring to the data collection diagram, determine what data to enter, in what sequence it should be gathered, and how to group data for processing to Application Programming Interfaces (APIs). Define data prompts for each barcode transaction type.

If you use GIS functionality, you will need to load GIS assets into the system at the system initialization. Ensure that the GISOBJID is manually assigned for each asset you need to integrate during the system initialization. These manually assigned GISOBJIDs must have values in a range of 0 to 100,000,000. The GISOBJID Sequence Generator begins automatically numbering equipment records that are created through Infor EAM or the GIS system with `100,000,001`.

Note: You cannot load a GIS asset into the system with a GISOBJID greater than 100,000,000.

For equipment audits, create scanner prompts with the Interface Type A (Equipment Audits) and L (Equipment Audit Lines).

Follow these steps to define transaction prompts.

1 Open the Transaction Types form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page. The system automatically populates Forms SQL Code.
3 Transaction Type—Enter the transaction type for which to define prompts.

The system automatically populates the transaction type description.

4 Line—Enter a unique code identifying the prompt/processing definition line within the scanning transaction.

5 Data Type—Select one of the following options:

- **Alphabetic**—Select for alphabetic characters.
- **Computed**—Select for the system to automatically make a calculation.
- **Date**—Select for the system to prompt for data that has a time component.
- **Fixed**—Select to define a fixed value.
- **Numeric**—Select for numeric characters.

6 **Prompt Description**—Enter the prompt as it is to appear on the scanning device.

7 Choose one of the following options:

- *Fixed for Data Type*—Enter, for Fixed Data, the fixed data value for this prompt. For example, if equipment type will always be Asset, enter A.
- *If you selected Computed for Data Type*—Enter, for Computed Data, the SQL command string used for the calculation. Use `TKD_PROMPTDATA1, TKD_PTOMPTDATA2`, etc., to refer to the relevant column on the tracking transaction table.
- *If you selected Alphabetic for Data Type*—Enter, for Pattern Match, a pattern match. Refer to Step #8 for more information about Pattern Match.
- *If you selected Date for Data Type*—Enter, for Date Format Mask, a date format mask. The date format mask should match the data that is being entered in the data collection upload columns.

8 Pattern Match—Enter the pattern matching to be performed by the scanner. Pattern characters can include the following values:

- . (period)—Represents a single alphabetical character, A through Z
- # (pound sign)—Represents any single number, 0 through 9
- _ (underscore)—Represents any single alphanumeric character, A through Z and 0 through 9
- % (percent)—Represents a string of alphanumeric characters
- , (comma)—Represents an OR condition
- : (colon)—Represents a THROUGH condition
- Any character(s) or number(s)—Indicates that exact character or number in that position
- ! any character(s) or number(s)—Indicates data entered should not match what follows the "!"

9 Archive Column—Enter the column where the system archives transaction data.

10 Interface Type

- A (Equipment audits)—Indicates the equipment audit starting point and designates a batch number
- ADI (Add Details Interface)—Adds comments to a record
- E (Events (work order) interface)—Creates and updates work orders and activities
- H (Booked hrs interface)—Books labor hours on a work order activity
- I (Inventory issues)—Tracks inventory transactions of assets or parts, such as issues, returns, store-to-store movements, etc.
- IRI (Inspection results interface)—Tracks inspection results
- L (Equipment audit lines)—Indicates the equipment audit data

- MANF (Manufacturers interface)—Tracks manufacturer information
- O (Equipments interface)—Tracks assets, hierarchies, and user attributes
- PART (Parts interface)—Creates and updates part information
- PURC (Purchase order interface)—Downloads, creates, and updates purchase orders
- R (P.O. receipt)—Receives assets and parts with or without a purchase order
- READ (Readings interface)—Records meter readings
- REQ (Requisition interface)—Creates and updates requisitions for Goods requested transactions
- S (Stocktake interface)—Enters physical inventory counts
- TOUS (Tool usage interface)—Tracks tool usage information

11 Group Sequence—Enter the sequence in which to group data collection transactions.

12 Upload Column—Enter the interface column in which to load the data.

13 Action Code—Enter the action that the selected interface performs on this data.

14 Prompt Sequence—Enter the chronological order in which this prompt occurs. Do not skip sequence numbers.

15 Minimum Length—Enter the minimum number of characters required for the data to enter at the prompt. Valid values are integers in the range of 0 to 99999999. Enter nothing or 0 to make this prompt optional.

16 Next Prompt—Enter the next prompt to display on the barcode scanner. The maximum number of digits is eight.

17 Maximum Length—Enter the maximum number of characters required for the data to enter at the prompt. Valid values are integers in the range of 1 to 2000.

18 Dup. Previous Value—Select to duplicate the previous value of the prompt.

19 If Data Is—Enter branch conditions, as necessary. Branch conditions include the following values:

- != represents not equal
- < represents less than
- <= represents less than or equal to
- = represents equal to
- > represents greater than
- >= represents greater than or equal to

Note: Infor suggests that you prompt the user once and then use a calculated field for each subsequent time.

20 Pattern—Enter the pattern of the data collected. You can enter only one pattern.

21 Go To—Enter the prompt to display if the result of **If Data Is** and **Pattern** is true.

Note: This field is used by Infor EAM Forms.

22 Query Code—Enter the query code that defines a lookup for this prompt.

23 LOV Entity—Enter the entity of the lookup.

24 Validate File—Enter the filename of an ASCII text file against which to validate entries. The filename must be in DOS format. For example, you can enter a file containing a list of authorized employee codes. When you enter an employee code, the reader accesses the file and validates the scanned code against the employee list.

25 Lookup Attached—Select to make the lookup defined by **SQL Code** available. If you do not select this field, the system still validates data against **SQL Code**, but the lookup is not available.

26 Not Available—Select to ensure data entered is not in the lookups.

27 Override—Select to allow users to enter nonvalid data if **Not Available** is unselected or to enter valid data if **Not Available** is selected.

28 Print Barcode Label—Select to print a barcode label.

Note: This field is used by Infor EAM Mobile.

29 Click Save Record. The system saves the record.

Note: Click Validate to validate the transaction prompt.

Defining Return Transaction Prompts

Define return prompts to create default values for specific prompts. For example, if creating an inter-warehouse transfer issue with a prompt for requisition number, requisition line, and outstanding quantity, set up a trigger to search and automatically populate outstanding quantity with a value. Define triggers using SQL statements.

Follow these steps to define return transaction prompts.

1 Open the Transaction Type form. The system displays the List View page.

2 Select the transaction type for which to define return prompts, and then click the Return Prompts tab. The system displays the Return Prompts page.

3 Click Add Return Prompt. The system inserts a new Return Prompt Details record.

4 Source Prompt—Enter the number corresponding to the prompt sequence number that triggers the return prompt when you leave or tab out of the field.
The system automatically populates the source prompt description.

5 Target Prompt—Enter the number corresponding to the target prompt sequence number that receives the default value. The system automatically populates the target prompt description.

Note: Target Prompt must be greater than Source Prompt.

6 Query Code—Enter the code identifying the SQL statement that calculates the default value for the target prompt.

The system automatically populates SQL Statement.

7 Click Submit. The system saves the record and updates the Return Prompts list.

Note: To delete a return prompt, select the return prompt to delete, and then click Delete Return Prompt. The system deletes the record and updates the Return Prompts list.

Entering Data with the Prompt Machine

Enter data into the data collection module with the Prompt Machine form instead of a barcode scanner, as necessary. Submit one or more transactions of a selected transaction type.

⭐ **Important:** You must tab through the prompt data fields. You cannot navigate through the form by performing a left-mouse click on a specific field. The only field available for navigation in this manner (by performing a left-mouse click) is Transaction Type.

Follow these steps to enter data with the prompt machine.

1 Open the Prompt Machine form.
2 Transaction Type—Enter the transaction type for which to enter data.

   The system automatically populates the description of the transaction type and displays the prompt data fields associated with the transaction type.

3 Click Add Transaction. The system inserts a new Transaction Details record.
4 Enter data for the prompt data fields as necessary.
5 Click Add to List. The system updates the Transactions list.
6 Click Process Transactions. The system saves the records.

   Note: If you tab from the current Prompt Data to a lower-numbered Prompt Data, the system automatically adds the record to the Transactions list, completing the current transaction and beginning a new transaction.

   To remove a transaction, select the transaction to remove, and then click Remove Transaction. The system removes the record and updates the Transactions list.

Viewing Scanner Transactions To Be Processed

View scanner transactions to be processed. The number of records available to view constantly changes as new records are processed through the system interface.

Note: View and correct any errors on the Error Correction page.

Follow these steps to view scanner transactions to be processed.

1 Open the Interface Transactions form. The system displays the List View page.
2 View the transaction information.

Setting Up Jobs

Set up predefined jobs. View and modify jobs. Disable jobs to stop their next scheduled executions or restart previously stopped jobs.

⭐ **Important:** The JobCacheRefreshInterval tag in MPConfiguration.xml controls how often the job information is monitored for changes. By default, the JobCacheRefreshInterval tag checks the jobs every 15 minutes.

Follow these steps to set up jobs.

1 Open the Job Setup form.
2 Select the job to set up.
3 Active—Select to enable the job to start at the Next Run date and time.

   Note: If you unselect Active, the system disables the next execution of the job.

4 View the schedule pattern using Month, Day of Month, Day of Week, Hour, and Minute.

   The schedule patterns are typically numeric, but can also include the following characters:

   • * (asterisk)—Matches all days, months, hours, and minutes, e.g., an asterisk in Day of Week indicates that the system performs the job every day of the week.

   • , (comma)—Separates lists of days, months, hours, and minutes, e.g., 31, 12, 0, 0 represents 12:00 A.M. on December 31.

   • - (hyphen)—Specifies a range, e.g., 10-12 equals hours 10, 11, and 12.

   • / (backslash)—Specifies increments, e.g., 0/15 minutes equals minutes 0, 15, 30, and 45.

   • L—Indicates the last, e.g., Day of Month=L equals the last day of the month.

   •

   Refer to the table below for an example of a schedule pattern.

Month	Day of Month	Day of Week	Hour	Minute	Description
*	*	*	0	5	Run 5 minutes past midnight, every day.
*	*	1-5	22	0	Run at 10:00 P.M. on each weekday.
*	*	*	0-23/1	0	Run each hour, every day.
3-12/3	L	*	1	0	Run at 1:00 A.M. on the last day of each

	calendar quar-ter.

5 Click Submit. The system saves the record, updates the Jobs list, and automatically populates the Next Run date and time.

Correcting Scanner Transaction Errors

Correct transaction errors by correcting data prompt values, and then submit the changes to the system database. Save the updated record to resubmit it to the interface for reprocessing. The system automatically reprocesses the correct record when saved.

Note: If a transaction error does not exist for an interface transaction, the system protects all fields.

Follow these steps to correct scanner transaction errors.

1 Open the Interface Transactions form. The system displays the List View page.
2 Select the record for which to correct transaction errors, and then click the Error Correction tab. The system displays the Error Correction page.
3 Enter corrections to the data prompt values to correct the transaction error.
4 Click Save Record. The system saves the record.

GIS Administration

<div style="text-align: right">**6**</div>

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

This chapter documents procedures completed in both the Infor EAM and ESRI GIS systems. As a result, section headings include (Infor EAM) or (ESRI), if applicable, to identify in which system the task should be performed.

Note: Refer to "Setting Up Menus for User Groups" on page 50 for information on granting access to the GIS Map Search form within Infor EAM.

If you have purchased the GIS module and need to install ESRI, refer to ESRI's GIS installation documentation.

The Infor EAM-GIS integration supports both the `ArcIMS` and the ArcGIS server platforms. However, certain aspects of the integration differ slightly between the ArcIMS and ArcGIS platforms. The differences are noted where appropriate within this guide.

Installing or Upgrading Infor EAM GIS Extensions

> ⭐ **Important:** If you previously installed Infor EAM GIS Toolkit in a location other than `C:\inforE AM\GIS`, e.g., you modified the `SETUP.BAT` file supplied on the Infor EAM GIS Toolkit CD, contact Infor Technical Support.

Install Infor EAM GIS Extensions to integrate Infor EAM with ESRI. Follow this procedure to install Infor EAM GIS Extensions or to upgrade a previously installed version of the Infor EAM GIS Toolkit to the Infor EAM GIS Extensions.

Note: If you are upgrading from a previously installed version of the Infor EAM GIS Extensions or are reinstalling to a new location, the Installation Wizard automatically backs up user-created files from the toolbar and help directories. The Installation Wizard saves the toolbar.bak and help.bak directories in the original installation location.

Follow these steps to install or upgrade Infor EAM GIS Extensions.

1   Insert the Infor EAM GIS Extensions CD into the proper drive. The system displays the first installation dialog box.

  Note: If the system does not open the first installation dialog box automatically, go to the drive where the GIS Integration CD is located, and run `setupwin32.exe`.

2 ClickNext. The system displays the next installation dialog box.

3 Select **I accept the terms of the license agreement** if you agree to the terms, and then click Next. The system displays the next installation dialog box.

4 Verify that the required applications are installed, and then click Next. The system displays the next installation dialog box.

5 Select **Install New Infor EAM GIS Extensions** to install Infor EAM GIS Extensions for the first time or to upgrade to Infor EAM GIS Extensions from a previous version, and then click Next. The system displays the next installation dialog box.

   Note: Select **Add or Remove Infor EAM GIS Extensions** if you have already installed or upgraded to this version of Infor EAM GIS Extensions but want to add or remove individual extensions from your configuration.

6 Select the extensions to install. Refer to the following information:

   Note: Configuration and Help are required selections.

   • Create Equipment—Select to install Infor EAM equipment creation within ESRI.
   • Create Work Order—Select to install the Create Work Order popup.
   • Events—Select to install the Infor EAM Events popup.
   • Map Feature Attributes—Select to install the Map Feature Attribute popup.
   • Synchronize Records—Select to install the Synchronize Records popup.
   • Synchronize Attributes—Select to install the Synchronize Atrributes popup.
   • Data Filter—Select to install the Data Filter popup.

7 ClickNext. The system displays the next installation dialog box.

8 Enter the directory in which to install the Infor EAM GIS Extensions, and then click Next. The system displays the next installation dialog box.

9 Review the settings information, and then click Next. The system installs the Infor EAM GIS Extensions and displays a confirmation message.

10 Click Finish. The system closes the dialog box.

> **Important:** If the Infor EAM GIS Extensions are not visible by default in ArcMap, choose Tools > Customize > Toolbars from the menu bar, and then select Infor EAM GIS Extensions.

Understanding GIS Integration

Both Infor EAM and ESRI's GIS should reflect an accurate representation of your company assets. Link Infor EAM equipment records and GIS features with a GIS object identification number (GIS ID in Infor EAM GISOBJID in ESRI).

Define user preferences to control how ESRI responds when a user creates new equipment records within Infor EAM and how Infor EAM responds when a user creates new features within ESRI. Refer

to "Defining Preferences for the Creation of Infor EAM Equipment later in this chapter for more information.

ESRI and Infor EAM create and synchronize corresponding equipment/features based on field mappings and GIS profiles. The field mappings and GIS profiles ensure the systems populate accurate attribute data while creating features/equipment.

Field mappings, which are defined at the layer level, allow users to move or copy specific data from one feature to its corresponding equipment record or vice-versa, e.g., map the DISTRICT attribute in ESRI to the Organization field in Infor EAM. The system populates the equipment record's Organization with the data contained in the DISTRICT attribute for the feature. Refer to Defining Field Mappings for Attributes (ESRI).

Equipment profiles, which serve as equipment templates, can be related to GIS layers. If an attribute value will be the same for all features in a layer, then the profile can be used to populate this equipment value, e.g., if the Organization of the GIS profile is Org 1, all equipment/features created based on that profile belong to Org 1. Refer to Defining Preferences for the Creation of Infor EAM Equipment, and Defining Preferences for the Creation of GIS Features.

Note: During equipment/feature creation, if there are both field mappings and a GIS profile, the system populates fields based on the mappings first. If you do not define a mapping for a field, the system populates the field based on the information defined on the related GIS profile.

If a field mapping for an attribute exists, the system always populates the equipment field based on the data of the attribute, even if the attribute value is empty and the GIS profile value contains data.

The Infor EAM-GIS integration supports both the ArcIMS and the ArcGIS server platforms. However, certain aspects of the integration differ slightly between the ArcIMS and ArcGIS platforms. The differences are noted where appropriate within this guide.

Defining Equipment for Features Defined Prior to Integration

Defining Equipment for Features Defined Prior to Integration Infor EAM for the first time, move multiple GIS features to Infor EAM through data collection. Refer to Defining Transaction Prompts Chapter 5 of the Data Collection of the Infor EAM System Administrator's Guide.

Every GIS feature for which you create a corresponding Infor EAM equipment record must have a GISOBJID number.

Note: If you need to integrate a GIS feature with Infor EAM that does not have a GISOBJID field for its layer, you must manually create the field. Refer to Creating Gisobjid Fields for Layers Manually (ESRI) below.

After you manually create the GISOBJID field for each layer you need to integrate with Infor EAM, manually enter a GISOBJID number for each feature within the layer. numbers that you manually enter must be less than 100,000,000.

Creating GISOBJID Fields for Layers Manually (ESRI)

Infor EAM automatically generates GIS ID numbers once the two systems are fully integrated, but you must manually enter a `GISOBJID` number in the attribute table of every GIS feature that you want to move to Infor EAM prior to integrating the systems. For every layer containing GIS features that need to be integrated with Infor EAM manually create a `GISOBJID` field.

Follow these steps to create `GISOBJID` fields for layers manually.

1   Open ArcMap to an existing map. ArcMap displays the ArcEditor page.
2   Select the layer for which to add a `GISOBJID` field.
3   Right-click the layer, and then choose **Open Attribute Table**. The system displays the Attributes Table for the selected layer.
4   Click Options, and then select **Add Field**. The system displays the Add Field popup.
5   Name—Enter `GISOBJID`.

   Note: Enter the name of attribute column headers using all uppercase letters. The system only searches column headers in all uppercase letters when performing a search based on a GIS Filter. Refer to Creating GIS Filters in the GIS User's Guide.

6   Type—Select `Long Integer`.

   Note: Enter a precision of 9.

7   Click OK. The system saves the record and includes the `GISOBJID` field in the layer's attribute table.

Configuring the Geoprocessing Service for the ArcGIS Server
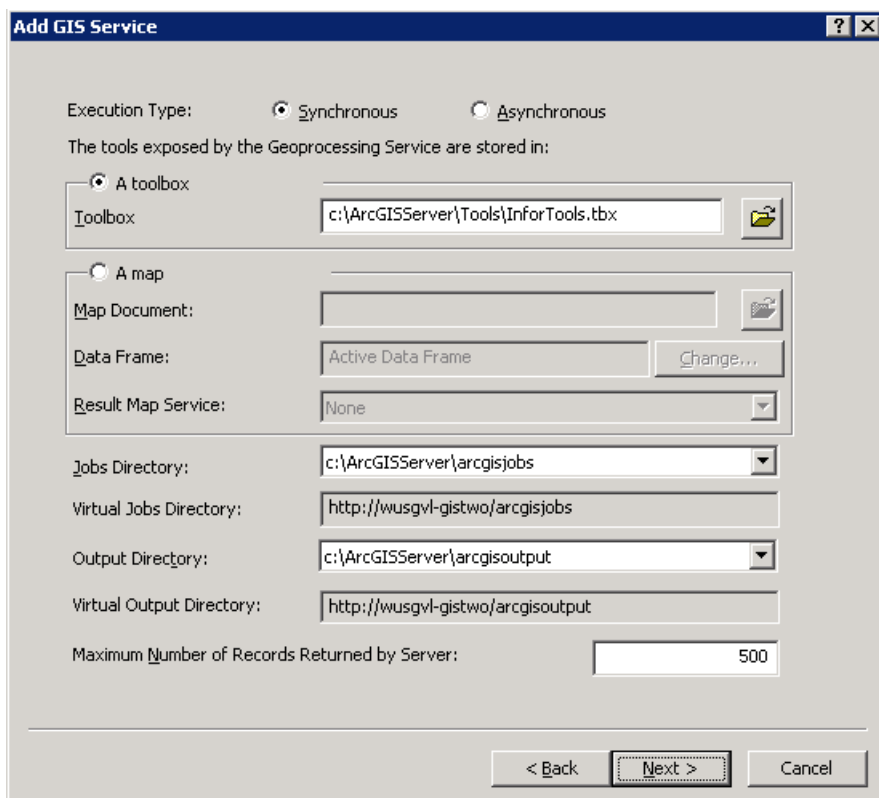
The Infor EAM-GIS integration supports both ArcIMS and ArcGIS Server. When integrating Infor EAM and GIS using ArcIMS server, you must create an Image Service on the ArcIMS Server. Refer to ESRI documentation for more information. If you are integrating Infor EAM and GIS using ArcGIS Server, you must create a Map Service, Geocoding services, and also a Geoprocessing Service. Refer to ESRI documentation for more information on creating these services. You must create the Geoprocessing service using the InforTools.tbx toolbox located in the \arcgisserver\ directory of the Infor EAM GIS product CD. Refer to Modifying the GIS Installation Parameters (Infor EAM) for more information on enabling communications with these mapping services.

Follow these steps to configure the Geoprocessing Service for the ArcGIS server.

1   Open the ArcCatalog application.
2   Locate the GIS Servers menu, and then select your GIS server.
3   Right-click the server, and then choose **Add New Service**. The system displays the Add GIS Service dialog box.
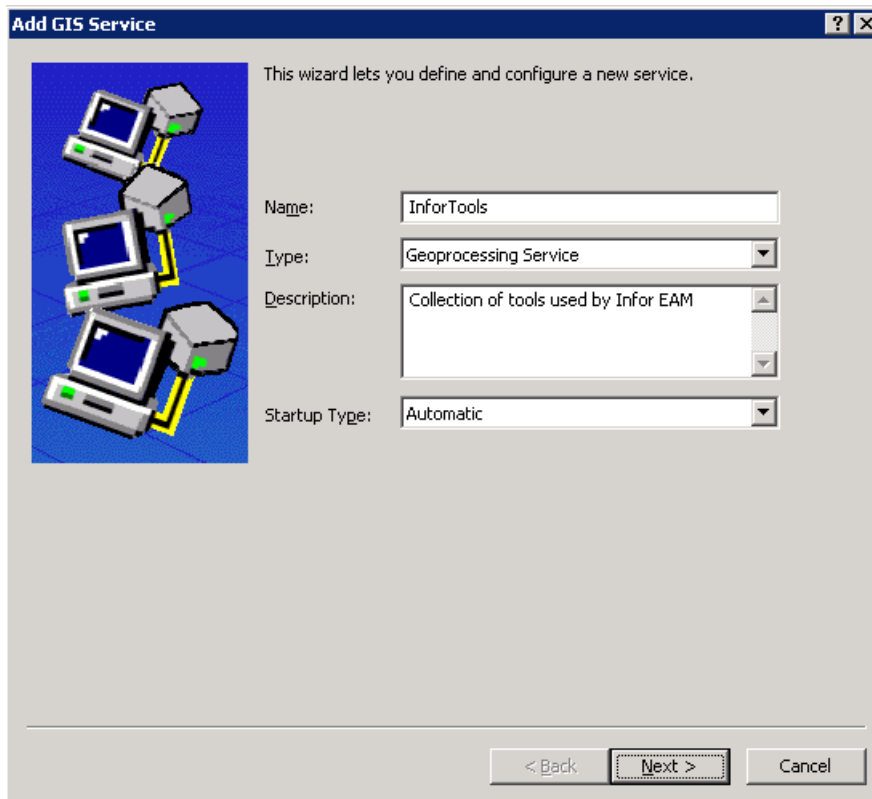
4 Name—Enter the GIS Service name, e.g., InforTools.

5 Type—Select Geoprocessing Service.

6 Description—Enter a description for the GIS service as necessary.

7 Startup Type—Select Automatic, and then click Next. The system displays the next Add GIS Service dialog box.

8 Execution Type—Select **Syncronous**.

9 Toolbox—Locate the InforTools.tbx file on your ArcGIS server.

> **Note:** InforTools.tbx is included on the Infor EAM GIS product CD.

10 Jobs Directory—Enter the location of the ArcGIS jobs directory.

11 Output Directory—Enter the location of the ArcGIS output directory.

12 Maximum Number of Records Returned by Server—Enter the maximum number of records to be returned by the ArcGIS server when running a job.

13 Click Next. The system displays the next Add GIS Service dialog box.
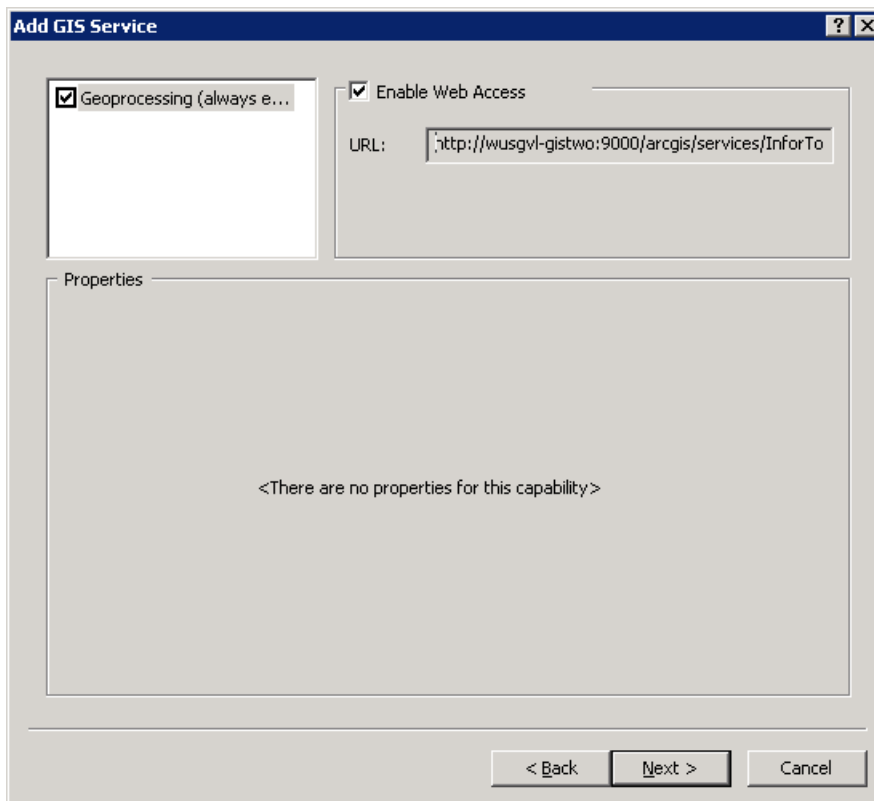
14 Select Enable Web Access, and then click Next. The system displays the next Add GIS Service dialog box.

   Note: The value displayed in the URL field is the value that must be entered for the GISGPSRV installation parameter. Refer to Configuration Parameters.

15 Complete the remaining steps of the Add GIS Service process as necessary, and then click Finish. The system adds the ArcGIS service and closes the Add GIS Service dialog box.

Configuring Infor EAM and ESRI's ArcMap

Configure Infor EAM and ESRI to best meet the specific needs of your company.

Configuring ArcMap for Equipment Creation (ESRI)

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

Follow these steps to configure ArcMap for equipment creation.

1 Choose Tools > Extensions from the menu bar. ArcMap displays the Extensions popup.
2 Select Infor EAM Create Asset Editor Extension, and then click Close.

Modifying the GIS Installation Parameters (Infor EAM)

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

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

Follow these steps to modify the GIS installation parameters.

1 Open the Install Parameters form. The system displays the List View page.
2 Select the following parameters and modify as necessary:

Configuration Parameters

Parameter	Description
GISAIMSP	Specify the `ArcIMS` platform. Acceptable values are `SHAPEFILE` and `SDE`.
GISAIMSV	Specify the `ArcIMS` version. For example, enter 9.2 if this is the installed version of `ArcIMS`.
GISCONTP	Specify the connection type between the Infor EAM web server and the `ArcIMS` server by entering a value of `TCP`, `HTTP`, or `HTTPS`. If no value is specified, a TCP connection is assumed. **Note:** Used only for ArcIMS server.
GISGPSRV	GIS geoprocessing service (AGS only). Refer to Configuring the Geoprocessing Service for the ArcGIS Server earlier in this chapter for more information.
GISHOST	`ArcIMS` server name (and domain if required).
GISIMGFM	Format of map image returned from ArcGIS Server. Acceptable values are BMP, GIF, JPG (default), PNG, and PNG24. **Note:** Used only for ArcIMS server.
GISPORT	Port number on which the `ArcIMS` service mentioned in the `GISSERV` install parameter is accessed. **Note:** Used only for ArcIMS server.

Parameter	Description
GISSERV	Name of the default Image Service setup on the `ArcIMS` server or map service URL on ArcGIS Server.
GISSRVTP	Specify the GIS server type. Acceptable values are IMS (default) and AGS.
GISSVAXL	GIS map file for service identified by GISSERV. Used for viewing nearest address, e.g., reverse geocoding. **Note:** GISSVAXL supports HTTP, fully qualified file paths, and UNC file paths. The system requires this to load the XML of the AXL and retrieve the geocoding definitions. Such information is not available via `ArcXML` responses. You do not need to specify a value for GISSVAXL if you are using ArcGIS.
URLGIS	Enter http://your.infor.com.server/attachments/gis-wo/tenantid/. Use http://your.infor.com.server /attachments/giswo/default/ if no tenant id exists. This value is used when displaying and printing map attachments of the work order.

Search-related Parameters

Parameter	Description
GISABLC	Maximum number of advanced buffer layers allowed in an advanced search. The default is 3.
GISADDR	Name of the Address Layer in the Image Service setup in the GISSERV install parameter. **Note:** When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.

Parameter	Description
GISCCCOL	Name of the Zone Column in the attributes of the Zone Layer. This parameter is used for non-geocoded, zone-only searches. **Note:** When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISCITY	Name of the Zone Layer in the Image Service setup as the GISSERV install parameter. This parameter is used for non-geocoded, zone-only searches. **Note:** When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISSTCOL	Name of the Zone Column in Attributes of the Address Layer. This parameter is used for non-geocoded address searches. **Note:** When geocoding is used, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV or GISSERV, depending on whether ArcGIS Server or ArcIMS is used.
GISEQUIP	Default equipment layer name
GISGEOSV	ArcIMS: Name of the secondary address for geocoding layers. (Refer to GISSERV for the default Image Service setup). Values should be separated by commas and can identify layers of different services (eg. Layer2, Layer3, Service2.Layer1). ArcGIS Server: Name of the geocoding service(s). Values should be separated by commas.

Parameter	Description
GISGMAXC	Specify the maximum number of geocoding match candidates. The default is 100.
GISGMIN	Specify the minimum geocoding score that the system should display in the Matching Addresses popup. The default is 20. Separate multiple geocoding score values with a comma. The first value listed is the score for GISSERV and subsequent entries are values for each GISGEOSV.
GISINTRS	Specify the separator for searching for intersection addresses. The defaults are &, |, and @. Values should be separated with a space. **Note:** When ArcGIS Server is being used and a geocoding process is established, the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV. If geocoding is not being used with ArcGIS Server, the system uses this information when performing searches.
GISMAPS	Set to `Global` to display a single map in Infor EAM based on GIS installation parameters. Set to `Organization` to display maps based on Organization. Set to `Department` to display maps based on Department. Department Security must be enabled when set to Department.
GISNARAD	Specify the radius, in meters, used for viewing the nearest address. The default value is 1500.
GISSTCOL	Name of the Street Column in Attributes of the Address Layer **Note:** When geocoding is used the system does not use this parameter as this information is contained within the geocoding service described by parameter GISGEOSV or GISSERV, depending on whether ArcGIS Server or ArcIMS is used.
GISZOFCT	Factor (%) of default extent by which the map search result will be enlarged. The default is 2.

Highlighted Line Parameters

Parameters	Description
GISLNCOL	Specify the color of the highlighted lines in the GIS map by entering an RGB color of 0 to 255.
GISLNWID	Specify the width of highlighted lines in the GIS map, or enter LAYERDEFINED. **Note:** For more information about the LAYERDE FINED value, refer to Customizing Map Symbols. If ArcGIS Service is being used and the value for this parameter is LAYERDEFINED the color information will come from the map's MXD symbology definition versus the GISLNCOL.

Highlighted Point Parameters

Parameters	Description
GISPTCOL	Specify the color of the highlighted points in the GIS map by entering an RGB color of 0 to 255.
GISPTTYP	Specify the point type. Valid values for ArcIMS: STAR, CIRCLE, CROSS, SQUARE, TRIANGLE, RASTERMARKER, or LAYERDEFINED. Valid values for ArcGIS Server: CIRCLE, CROSS, SQUARE, DIAMOND, X, RASTERMARKER, or LAYERDEFINED. Default is CIRCLE. **Note:** If ArcGIS Service is being used and the value for this parameter is LAYERDEFINED the color information will come from the map's MXD symbology definition versus the GISPTCOL.
GISPTWID	Specify the width of the highlighted point used in the GIS map.

Highlighted Polygon Parameters

Parameters	Description
GISPLYCL	Specify the fill color used for highlighted polygons in the GIS map by entering an RGB color of 0 to 255.
GISPLYBC	Specify the color used for the boundary of highlighted polygons in the GIS map by entering an RGB color of 0 to 255.
GISPLYFT	Specify the fill type of highlighted polygons in the GIS map by entering a value of HORIZONTAL, BDIAGONAL, CROSS, DIAGCROSS, FDIAGONAL or VERTICAL.
GISPLYTR	Specify the transparency level of the color fill of highlighted polygons in the GIS map. **Note:** If you are using ArcGIS Server, you do not need to specify a value for GISPLYTR because the system does not support the ability to highlight a polygon using a transparent image.

Markup Line and Point Parameters

Parameters	Description
GISMLCOL	Specify the color of the GIS markup line. The defaults are 255, 55, and 155.
GISMLWID	Specify the width of the markup line. The default is 4.
GISMPCOL	Specify the color of the markup point. The default is 255, 55, and 155.
GISMPTYP	Specify the type of the markup point. Valid values for ArcIMS: CIRCLE, STAR, CROSS, SQUARE, TRIANGLE, or RASTERMARKER. Valid values for ArcGIS Server: CIRCLE, CROSS, SQUARE, DIAMOND, X, or RASTERMARKER. Default is CROSS.
GISMPWID	Specify the width of the markup point. The default is 15.

Selected Feature Parameters

Parameters	Description
GISSFCLR	Specify the highlight color of selected features. The defaults are 248, 138, and 29.

Linear Equipment Label Parameters

Parameters	Description
GISDREL	Specify how the system should display boundary labels for linear equipment (referred to as 'routes' in GIS). Acceptable values are L, N, and A. The default is L.
	L—Display boundary labels for the longest path (in the event of multiple route paths)
	N—Display no boundary labels
	A—Display boundary labels for all paths (in the event of multiple route paths)

Text Marker Label Parameters

Parameters	Description
GISTFNTC	Specify the font color of the text marker label.
GISTFNTS	Specify the font style of the text marker label by entering BOLD, BOLDITALIC, ITALIC, REGULAR, OUTLINE, or UNDERLINE. The default is BOLD.
GISTFNTZ	Specify the font size of the text marker label. The default is 10.
GISFONT	Specify the font of the text marker label. The default is Arial.
GISTGCLR	Specify the color with which to highlight the text marker label.
GISTOCLR	Specify the color with which to outline the text marker label.

Parameters	Description
GISTPRMD	Specify the print mode for the text marker label by entering ALLUPPER, ALLLOWER, NONE, or TITLECAPS. The default is ALLUPPER.
GISTLPCL	Specify the point color of the text label.
GISTLPTP	Specify the point type of the text label by entering CIRCLE, STAR, CROSS, SQUARE, TRIANGLE or RASTERMARKER. **Note:** : For more information about the RASTERMARKER value, refer to Customizing Map Symbols.
GISTLPWD	Specify the width of the point used in the text label.

Overview Map Parameters

Parameters	Description
GISOVSV	Specify the image service to display within the overview map. The default is the value from GIS SERV.
GISOVSZ	Specify the size of the overview map. The number you enter represents a percentage of the width of the current map. The default is 25.

Customizing Map Symbols

Infor EAM provides basic symbols for use as map markers; however, you can customize your map symbols with the RASTERMARKER or LAYERDEFINED installation parameter values.

Define unique symbols with the RASTERMARKER value. The RASTERMARKER value allows you to place user-defined images on the ArcIMS server, and the system identifies features based on your user-defined image.

The LAYERDEFINED value allows you to display symbols based on those defined in ArcIMS from the layer's renderer symbology. The system maintains the displayed images even when you highlight features on the map, e.g., if you highlight manholes and transformers on your map, the system displays the renderer's distinct images for manholes and transformers, but highlights the images according to the color specified in the image's corresponding color installation parameter.

GISLNWID is LAYERDEFINED. Then use MxD symbology for color versus GISLNCOL.

GISPTTVP->GISPLOL.

Note: Images must be set up as follows: IMS images must refer to the GIS server and AGS images must refer to the Infor EAM server.

Granting Interface Permissions for Data Filter Grids (Infor EAM)

Users can filter Infor EAM data within ESRI using the Data Filter popup. Grant interface permissions to each of the filterable grids.

Follow these steps to grant interface permissions for data filter grids.

1 Open the User Groups form. The system displays the List View page.

2 Select the user group for which to grant interface permissions, and then click the Interface Permissions tab. The system displays the Interface Permissions page.
Refer to the following table of functions in order to grant user group access to the grids accessible by the GIS data filter:

3 Change this information:

Function	Grants Access To
BEGEQ	Equipment grid
BEGEQC	Equipment and related cost details grid
BEGEQE	Equipment and related event details grid
BEGWAC	Work order and related activity details grid
BEGWEQ	Work order and related equipment details grid

4 Select a function listed in the table above. The system displays the Function Permissions detail record.

5 Query—Select to allow users to retrieve records.

6 Click Submit. The system saves the record.

Defining Infor EAM User Information (ESRI)

Define Infor EAM user information in GIS so that you can create Infor EAM equipment records from within GIS. Infor EAM user information must be defined for each GIS client machine. After defining user information in GIS's ArcMap, you can define preferences for the creation of Infor EAM equipment records and create them within ArcMap.

Follow these steps to define Infor EAM user information in GIS.

1 Open ArcMap to an existing map. ArcMap displays the ArcEditor page.

2 Click ▥. ArcMap displays the User Information popup.

3 User—Enter a valid Infor EAM user name.

Note: If you are working in a multi-tenant environment, enter username@tenantID, e.g., if your username is SMITHB and your tenant ID is dsmp1, enter SMITHB@dsmp1.

4 Password—Enter the user's Infor EAM password.

5 Confirm Password—Re-enter the user's Infor EAM password.

6 Organization—Enter the organization under which the user logs in to Infor EAM.

7 Style—Select the style sheet to apply to Infor EAM popups in ArcMap. The system applies the selected style sheet to the popup immediately.

Note: The system provides three stylesheets: Default, Blue, and Gray. To create a custom style sheet, open DEFAULT.XSS located in C:\inforEAM\GIS\TOOLBAR\STYLES and make changes to the file as necessary. Do not save your changes to the original DEFAULT.XSS file; instead, save the style sheet under a new name to the same location. The newly created style sheet appears as an option in the dropdown list for Style.

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

9 Tenant—Enter the tenant ID if you are working in a multi-tenant environment.

10 Click Submit. ArcMap saves the record on the user's machine in C:\inforEAM\GIS\CONF\EWSUSER.XML.

Note: The system automatically creates this file if it does not already exist.

Defining Field Mappings for Attributes (ESRI)

Define field mappings for attributes stored within ESRI's GIS and Infor EAM at the layer level. The system populates fields based on the mappings during equipment/feature creation and synchronization.

Note: To define field mappings, you must have OEGGMP permissions. Refer to Granting Interface Permissions to User Groups Chapter 2 of System Security in the Infor EAM System Administrator's Guide.

During equipment/feature creation, the system populates fields based on the mapping relationship, e.g., to create an equipment record based on an existing feature, map data from a GIS Attribute to an Infor EAM Attribute. Infor EAM populates the field with the data contained in ESRI's GIS. You can also define field mappings based on constant values, e.g., enter a GIS Value of HYDRANT and map it to the category field in Infor EAM. During equipment creation, the system always populates the category field with

During synchronization, the system accesses field mappings to ensure corresponding equipment records and features reflect accurate data. If there is a discrepancy in data, the system copies data from one system to the other.

Note: You do not have to define field mappings for a feature's layer, location X, or location Y. The system automatically populates these values in the Infor EAM equivalent fields during creation and

synchronization. You may, however, define additional field mappings for these GIS attributes if you want the values of these fields copied into other Infor EAM fields.

You may map more than one GIS Attribute to a single Infor EAM Attribute and vice-versa. During creation and synchronization, the system concatenates the data into the single field based on the Sequence and Delimiter.

Likewise, you can map an Infor EAM Attribute that contains concatenated data into more than one GIS Attribute and vice-versa. During creation and synchronization, the system parses the data based on the Sequence. If the system must parse data because one field is mapped to multiple fields, it verifies that the number of fields to which to map data matches the instances of concatenated data in the source field. If it does not, the 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, overwriting any data that those fields originally contained.

Identify a Source system, which controls creation, and an Owner system, which controls synchronization. The system maps data from the Source system during equipment/feature creation. The system copies data from the Owner system during synchronization. Refer to the following example.

You define the following field mapping for the Hydrant layer:

GIS Attribute	Infor EAM Attribute	Source	Owner
ADDRESS	Description	GIS	Infor EAM

During synchronization of the Hydrant layer, the system discovers that a feature with the ADDRESS attribute of 156 Main Street does not have a corresponding Infor EAM equipment record. The system creates an equipment record and automatically populates its description field with 156 Main Street because ESRI's GIS is the Source.

Later, you update the same equipment record's description to 256 Main Street in Infor EAM. During the next synchronization of the Hydrant layer, the system updates the GIS feature's ADDRESS attribute to 256 Main Street because Infor EAM is the Owner of this attribute.

Note: The system only compares attribute data for Infor EAM and GIS if the attribute has a defined field mapping and the Action is set to Copy.

Follow these steps to define field mappings for attributes.

1 Open ArcMap to an existing map. ArcMap displays the ArcEditor page.

   Note: The map must contain an integrated layer to access the Map Feature Attributes popup.

2 Click 🔖. The system displays the Map Feature Attributes popup.

3 Layer—Select the layer for which to define field mappings. The system displays existing mapping records for the layer.

4 Click Add Mapping. The system inserts a blank Map Feature Attribute Details record.

5 Source—Select the system from which data should be mapped during equipment/feature creation. Choose one of the following options:

- **GIS**—Select to map data from GIS when creating new equipment records based on an existing GIS feature.
- **Infor EAM**—Select to map data from Infor EAM when creating new features based on an existing Infor EAM equipment record.
- **Both**—Select to apply this mapping when creating new equipment records/features regardless of which system the object originally resides. The system maps data from Infor EAM when creating new features and maps from ESRI's GIS when creating new equipment records.

6 Select the attribute (GIS Attribute or Infor EAM Attribute) from which data should be mapped or enter the value (GIS Value of Infor EAM Value) that should be mapped. The attribute or value should coincide with thesource system, e.g., if you selected GIS as the Source system, select a GIS Attribute of GIS Value to map.

Note: If you select Layer, Location X, Location Y, or Feature Length as the **GIS Attribute** from which to map data, the system automatically populates Source as GIS, **Action** as Copy, and **Owner** as GIS.

7 Select the attribute (GIS Attribute or Infor EAM Attribute) to which data should be mapped. Refer to the following table to understand the relationship between Mapped From and Mapped To, e.g., if you select a GIS Attribute in Step 6, you must enter an Infor EAM Attribute in Step 7:

Mapped From	Mapped To
GIS Attribute	Infor EAM Attribute
GIS Value	Infor EAM Attribute
Infor EAM Attribute	GIS Attribute
Infor EAM Value	GIS Attribute

Important: For linear features, map the GIS Attribute feature length to the Infor EAM Attribute equipment length, and then map the GIS Attribute for the feature's unit of measure to the Infor EAM Attribute equipment length unit of measure to enable linear equipment capabilities in Infor EAM. You must create your own GIS attribute in ESRI for the feature's unit of measure.

8 Action—Choose one of the following options:

- **Copy**—Select to copy the attribute data from the Source system.
- **Move**—Select to move the attribute data from the Source system. After the move is completed, the data will only exist in one system.

Note: If you select **Move**, the system protects Owner. Defining an Owner implies the data exists in both systems.

9 Owner—Select the system that controls synchronization when a discrepancy exists between a corresponding feature and equipment record. Data is copied from the Owner system to the field of the other system.

10 Sequence—Select the sequence number of the mapping.

If you select any number other than 1, the system enables Delimiter.

Note: You must select a Sequence number greater than 1 in the event that you map more than one GIS attribute to a single attribute within Infor EAM, e.g., if you map HYDRANT and HYDRANT_ID from GIS to Asset Infor EAM within , the system must know which data to list first in the Infor EAM Asset field.

11 Delimiter—Enter the delimiter value to use in the event that you map more than one GIS attribute to a single Infor EAM Attribute

12 Click Submit. The system saves the record and updates the GIS Map Feature Attributes list.

Defining Preferences for the Creation of Infor EAM Equipment (ESRI)

Define preferences for Infor EAM equipment records that you create from within the GIS system. When you define preferences, specify the equipment profile that GIS should use to create the Infor EAM equipment record when you create features in the related GIS layer.

Note: When creating equipment records, the system populates fields based on field mapping. If there is no mapping available for a field, the system populates the field based on the GIS profile.

Based on the information you enter in the Infor EAM Preferences popup, GIS can automatically create an Infor EAM equipment record in the same layer as its corresponding GIS feature whenever you define a new GIS feature. The system will not create an Infor EAM equipment record if the layer of the GIS feature is not listed in the preferences file.

Note: If you want to save an existing preference file in a different location, relocate the file, and then enter the new file path in Path To Preferences.

Follow these steps to define preferences for the creation of Infor EAM equipment.

1 Open ArcMap to an existing map. ArcMap displays the ArcEditor page.

2 Click ▦. ArcMap displays the User Information popup.

3 Click the Preferences tab. ArcMap displays the Preferences page.

4 Path To Preferences—Enter the file path in which to store the Infor EAM preferences.

   Note: ArcMap saves all files as .XML files.

5 Click Add Preference. ArcMap inserts a new Preference record.

6 Profile—Enter the Infor EAM equipment profile that ArcMap should use to create Infor EAM equipment records.
The system automatically populates Profile Org.

7 Layer—Select the GIS layer in which Infor EAM equipment records should appear.

8 Auto-create—Select if you want GIS to automatically create corresponding Infor EAM equipment records for features that you create within GIS.

9 Default—Select if this preference record is the default preference record.

> **Note:** Each profile can have only one default preference record per layer. You cannot select more than one record containing the same layer as a default record.

10 Click Submit. ArcMap saves the record to the file listed in Path To Preferences.

Defining Preferences for the Creation of GIS Features (Infor EAM)

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

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

Also specify how Infor EAM retrieves data for the creation of GIS features. There are three ways to populate data for the creation of GIS features from within Infor EAM: Auto-create, Prompt, and Manual.

Auto-Create

If you specify the preference for the creation of GIS features as Auto-Create, when users select a GIS profile when defining new Infor EAMequipment, the system automatically generates a GIS ID and populates the default Layer, Location X, and Location Ybased on the preference.

Fleet Management Configuration

<div style="color:red; font-size:2em; float:right">7</div>

This chapter provides procedures for configuring the Fleet Management module.

For more information on the American Trucking Association's Vehicle Maintenance Reporting System (VMRS) and defining VMRS in the system, refer to *Defining VMRS Codes* in Chapter 5 Work Management of the *User's Guide*.

For more information on fleet management reports, refer to Chapter 9 Reports of the *User's Guide*.

To access Infor10 Enterprise Asset Management Databridge functions within Infor Enterprise Asset Management, you must first set up Infor10 Enterprise Asset Management Databridge menus for user groups. Refer to "Setting Up Menus for User Groups" on page 50.

> ⭐ **Important:** This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Understanding Fleet Configuration

Use the Fleet Configuration form to personalize the vehicle ticketing, maintenance, and billing process for pool, loaner, and/or assignment fleets of vehicles. First, create billing parameters to configure the point at which vehicle tickets are billed. Next, set up billing schedules to determine the billing end dates for the period billing process, and create exceptions to include in bills when needed. Next, grant authorizations to specific user groups for specific vehicle types. Finally, identify fuel, maintenance, and billing categories.

You must also define cost codes, employees, and assets for use in the fleet management module. The Cost Codes, Employees, and Assets are not a part of the fleet management module. Thus, refer to "Defining Cost Codes" on page 16 Chapter 1   System Configuration for more information on defining cost codes for the fleet management module. Refer to "Defining Employee Codes" Chapter 5   Work Management of the *User's Guide* for more information on defining employees for the fleet management module. Refer to"Defining Assets" Chapter 2   Asset Management of the *User's Guide* for more information on defining vehicles as assets for the fleet management module.

Creating Parameters for Fleet Configuration

Set up parameters to determine the Vehicle Ticket form behavior and how the vehicle usage will be billed.

Follow these steps to create parameters for fleet configuration.

1 Open the Fleet Configuration form. The system displays the Parameters page.
2 Update Ticket PM Details—Choose one of the following options:

   • At Issue—Select to update the PM details on the vehicle ticket when a vehicle is issued.
   • At Return—Select to update the PM details on the vehicle ticket when a vehicle is returned.
   • Issue and Return—Select to update the PM details on the vehicle ticket when a vehicle is issued and returned.

   Note: Previous and next PM details are updated on the ticket of the specified time(s).

3 Min. Hours Billed—Enter the minimum number of hours to be billed. For example, if the Min. Hours Billed is four hours and the vehicle is returned after two hours, the customer will be billed for the minimum amount of four hours.
4 Offshift Billing Hours—Enter the number of hours if the usage includes any time outside of the billing start and end time. For example, if the normal billing hours are from 8:00 AM to 5:00 PM, any hours before 8:00 AM and after 5:00 PM will be considered offshift billing hours. Vehicles issued or returned outside the billing hours are billed accordingly. The offshift billing hours are billed once every 24-hour period.
5 Prompt When No Billing Code—Select to provide a warning message from the vehicle ticket if the system cannot find a billing code or markup code on the vehicle ticket at the time the vehicle is issued.
6 Billing Start Time—Select the time, in hours, at which the normal billing hours for the day should start, and then enter the time, in minutes, at which the normal billing hours should start in the adjacent field.
7 Billing End Time—Select the time, in hours, at which the normal billing hours for the day should end, and then enter the time, in minutes, at which the normal billing hours should end in the adjacent field.

   Note: If both Billing Start Time and Billing End Time are empty, the system selects a 24-hour billing cycle.
   Billing Start Time must be before Billing End Time.

8 Round Billing Hrs. Up—Select to round the billing hours to the nearest ¼, ½, or whole hour.

   Note: If you do not want to round the ticket billing hours up, do not enter a value for **Round Billing Hrs. Up**.

9 Pool—Select to indicate that the fleet customer and cost code on the vehicle record needs to be updated with the ticket values when a pool ticket is created.
10 Loaner—Select to indicate that the fleet customer and cost code on the vehicle record needs to be updated with the ticket values when a loaner ticket is created.
11 Assignment—Select to indicate that the fleet customer and cost code on the vehicle record needs to be updated with the ticket values when an assignment ticket is created.
12 Click Save Record. The system saves the record.

Note: If the process fails to run automatically as scheduled, click Run Billing Process to manually run the billing process. The system generates customer bills, beginning with the earliest Period End Date specified on the Billing Schedules page of the Fleet Configuration form that is past due. Refer to Setting Up Billing Schedules for Fleet Configuration.

You cannot manually run the billing process unless the Process Start Date/Time on the Billing Schedules page is before the current system date and time; the period has not been billed; Billed on the Billing Schedules page is unselected; and the billing process for the record is not currently running or the billing process for the record is running but has been running for longer than 30 minutes.

Setting Up Billing Schedules for Fleet Configuration

Set up billing schedules to determine what transactions are billed and when they will be created. At the end of the billing schedule, generate customer bills that correspond with the billing schedule Period End Date.

Refer to Creating Parameters for Fleet Configuration for more information on running the billing process.

Follow these steps to set up billing schedules for fleet configuration.

1 Open the Fleet Configuration form. The system displays the Parameters page.
2 Click the Billing Schedules tab. The system displays the Billing Schedules page.
3 Click Add Billing Schedule. The system inserts a new Billing Schedule Details record.
4 Period End Date—Enter the date at which the billing period will end, e.g., 6/25/05.
5 Period Description—Enter a description of the billing period, e.g., June 2005.
6 Process Start Date—Enter the date at which to start the billing process for the selected billing period.

   Note: The Process Date/Start Time must be greater than the Period End Date.

7 Process Start Time—Enter the time in hours and minutes at which to start the billing process.
8 Click Submit. The system saves the record and updates the Billing Schedules list.

   Note: To delete a billing schedule, select the billing schedule to delete, and then click Delete Billing Schedule. The system deletes the record and updates the Billing Schedules list.

   If the billing process is currently running for the period, the system selects In Process.

   The system selects Billed after the billing process has been run for the billing schedule.

   Refer to Creating Parameters for Fleet Configuration

   You can manually select Billed to create a starting point for the first billing process.

Creating Exceptions for Fleet Configuration

Create exception codes, and then associate fees with the exception codes that will be included in bills. For example, create an exception code that charges customers for low amounts of fuel in returned vehicles, and then associate a $50 fee for that specific exception. Exception codes are associated with vehicle tickets on the Exceptions page of the Vehicle Ticket form.

Follow these steps to create exceptions for fleet configuration.

1   Open the Fleet Configuration form. The system displays the Parameters page.
2   Click the Exception Codes tab. The system displays the Exception Codes page.
3   Click Add Exception. The system inserts a new Exception Details record.
4   Exception—Enter the exception to be applied to vehicle tickets, and then enter a description of the exception in the adjacent field.
5   Organization—Enter the organization to which the exception belongs if you use multi-organization security.
6   Billing Amount—Enter the set fee to associate with the exception during the billing process.
7   Standard WO—Enter a standard work order that can be used to create work that corrects the exception condition for the vehicle ticket.
8   Out of Service—Select to prevent the exception from being displayed in the lookups.
9   Click Submit. The system saves the record and updates the Exception Codes list.

   Note: To delete an exception, select the exception to delete, and then click Delete Exception. The system deletes the record and updates the Exception Codes list.

Granting Vehicle Ticket Authorizations for Fleet Configuration

Grant vehicle ticket authorizations to define appropriate privileges to user groups for pool, loaner, and assignment vehicle ticket types. Associate specific user groups with specific vehicle ticket types, and then grant authorizations for the user group to insert, delete, and/or update vehicle ticket records of that type.

Note: You can only grant vehicle ticket authorizations if the installation parameter VTTAUTH is set to ON. Contact your system administrator for more information.

Follow these steps to grant vehicle ticket authorizations for fleet configuration.

1   Open the Fleet Configuration form. The system displays the Parameters page.
2   Click the Vehicle Ticket Authorizations tab. The system displays the Vehicle Ticket Authorizations page.
3   Click Add Authorization. The system inserts a new Ticket Authorization Details record.
4   Ticket Type—Select the vehicle ticket type with which to associate a user group.
5   User Group—Enter the user group to which to grant vehicle ticket authorizations.

6   Insert—Select to give the user group authorization to insert new vehicle ticket records.

7   Update—Select to give the user group authorization to update existing vehicle ticket records.

8   Delete—Select to give the user group authorization to delete existing vehicle ticket records.

9   Click Submit. The system saves the record and updates the Vehicle Ticket Authorizations list.

    Note: To delete an authorization, select the authorization to delete, and then click Delete
    Authorization. The system deletes the record and updates the Vehicle Ticket Authorizations list.

Tracking Fuel Costs for Fleet Configuration

Track fuel costs and separate fuels costs from other costs by associating part classes that identify fuel
parts in inventory. The system bills any parts of the selected class that are issued to vehicles as fuel.
Costs related to this billing category are displayed on the bill.

Follow these steps to track fuel costs for fleet configuration.

1   Open the Fleet Configuration form. The system displays the Parameters page.

2   Click the Fuel tab. The system displays the Fuel page.

3   Click Add Part Class. The system inserts a new Part Class Details record.

4   Part Class—Enter the part class that identifies fuel parts in inventory. The system automatically
    populates the part class description in the adjacent field.

    The system automatically populates Part Class Org.

5   Click Submit. The system saves the record and updates the Fuel list.

    Note: To remove a part class, select the part class to remove, and then click Remove Part Class.
    The system deletes the record and updates the Fuel list.

Tracking Maintenance Costs for Fleet Configuration

Track maintenance costs for fleet configuration by entering work order types that identify maintenance
or non-maintenance related costs for the billing process. Costs related to both maintenance and
non-maintenance billing categories are displayed on the bill.

Follow these steps to track maintenance costs for fleet configuration.

1   Open the Fleet Configuration form. The system displays the Parameters page.

2   Click the Maintenance tab. The system displays the Maintenance page.

3   Click Add WO Type. The system inserts a new WO Type Details record.

4   WO Type—Select the work order type for which to track maintenance costs.

5   Maintenance—Select to indicate that the costs are maintenance costs.

Note: If you select Maintenance, the costs associated with work orders of this type will display on the Billing History page of the Fleet Customers form under Maintenance. If you unselect Maintenance, the costs associated with work orders of the specified work order type will display as non-maintenance costs. Refer to "Viewing Billing Histories for Fleet Customers" on page 137

6 Click Submit. The system saves the record and updates the Maintenance list.

Note: To remove a WO Type, select the WO Type to remove, and then click Remove WO Type. The system removes the record and updates the Maintenance list.

Creating Fleet Billing Codes

Create billing codes to determine the normal fees that customers are billed for vehicle usage through the ticketing process. Together, billing codes and markup codes, when associated with specific fleet customers, determine the total rates for specific fleet billing categories.

Follow these steps to create fleet billing codes.

1 Open the Fleet Billing Codes form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Organization—Enter the organization to which the fleet billing code belongs if you use multi-organization security.
4 Code—Enter a fleet billing code, and then enter a description of the fleet billing code in the adjacent field.
5 Class—Enter the class to which the fleet billing code belongs.
The system automatically populates Class Org.
6 Out of Service—Select to prevent the fleet billing code from being displayed in the lookups.
7 Click Save Record. The system saves the record.

Setting Up Rates for Fleet Billing Codes

Set up rates for fleet billing codes. Specify particular rates for particular dates by setting up start dates and end dates for the rates. For example, a usage rate might fluctuate during different times of the year. Set up usage rates for usage charges, mileage rates for mileage charges, and insurance rates for insurance charges.

Follow these steps to set up rates for fleet billing codes.

1 Open the Fleet Billing Codes form. The system displays the List View page.
2 Select the fleet billing code for which to set up rates, and then click the Rates tab. The system displays the Rates page.
3 Click Add Rate. The system inserts a new Billing Code Details record.
The system automatically populates all currency fields.
4 Start Date—Enter the start date of the rate.

5 End Date—Enter the end date of the rate.

> **Note:** Start Date must be on or before the End Date.

6 Usage Rate Type—Choose one of the following options:
- Hourly—Select to bill usage charges by the hour.
- Billing Period—Select to bill usage charges according to the billing period.

7 Usage Charge—Enter the usage charge for the rate, if the rate is a usage rate.

> **Note:** To set up a usage rate, you must enter both a Usage Rate Type and a Usage Charge.

8 Mileage Charge—Enter the mileage charge for the rate, if the rate is a mileage rate.

9 Insurance Charge—Enter the insurance charge for the rate, if the rate is an insurance rate.

10 Click Submit. The system saves the record and updates the Rates list.

> **Note:** To delete a rate, select the rate to delete, and then click Delete Rate. The system deletes the record and updates the Rates list.

Creating Fleet Markup Codes

Create fleet markup codes. Markup codes are used to charges additional fees above and beyond the normal fees, i.e., profit margin. Together, billing codes and markup codes, when associated with specific fleet customers, determine the total rates for fleet billing categories.

Follow these steps to create fleet markup codes.

1 Open the Fleet Markup Codes form. The system displays the List View page.

2 Click New Record. The system inserts a new record and displays the Record View page.

3 Organization—Enter the organization to which the fleet markup code belongs if you use multi-organization security.

4 Code—Enter a fleet markup code, and then enter a description of the fleet markup code in the adjacent field.

5 Class—Enter the class to which the fleet markup code belongs.
The system automatically populates Class Org.

6 Out of Service—Select to prevent the fleet markup code from being displayed in the lookups.

7 Click Save Record. The system saves the record.

Setting Up Rates for Fleet Markup Codes

Set up rates for fleet markup codes. Specify particular rates for particular dates by setting up start dates and end dates for the rates. A markup can be expressed as a flat rate or a flat percentage. For example, select to mark up the cost of fuel by 20 USD (per inventory UOM) or by 50 percent.

Note: You cannot enter a markup charge and a markup percentage for the same markup code.

Follow these steps to set up rates for fleet markup codes.

1 Click Add Rate. The system inserts a new Markup Code Details record.

2 Select the fleet markup code for which to set up rates, and then click the Rates tab. The system displays the Rates page.

3 Start Date—Enter the start date of the rate.

4 End Date—Enter the end date of the rate.

   Note: Start Date must be on or before End Date.

5 Fuel—Enter the markup amount for fuel charges.

6 Labor—Enter the markup amount for labor charges.

7 Parts—Enter the markup amount for parts charges.

8 Contract Labor—Enter the markup amount for contract labor charges.

9 Pool Mileage—Enter the markup amount for mileage charges on pool tickets.

10 Loaner Mileage—Enter the markup amout for mileage charges on loaner tickets.

11 Assignment Mileage—Enter the markup amount for mileage charges on assignment tickets.

12 Pool Usage—Enter the markup amount for usage charges on pool tickets.

13 Loaner Usage—Enter the markup amount for usage charges on loaner tickets.

14 Assignment Usage—Enter the markup amount for usage charges on assignment tickets.

15 Insurance—Enter the markup amount for insurance charges.

16 Fuel %—Enter the markup percentage for fuel charges.

17 Labor %—Enter the markup percentage for labor charges.

18 Parts %—Enter the markup percentage for parts charges.

19 Contract Labor %—Enter the markup percentage for contract labor charges.

20 Pool Mileage %—Enter the markup percentage for mileage charges on pool tickets.

21 Loaner Mileage %—Enter the markup percentage for mileage charges on loaner tickets.

22 Assignment Mileage %—Enter the markup percentage for mileage charges on assignment tickets.

23 Pool Usage %—Enter the markup percentage for usage charges on pool tickets.

24 Loaner Usage %—Enter the markup percentage for usage charges on loaner tickets.

25 Assignment Usage %—Enter the markup percentage for usage charges on assignment tickets.

26 Insurance %—Enter the markup percentage for charges on insurance tickets.

27 Click Submit. The system saves the record and updates the Rates list.

   Note: To delete a rate, select the rate to delete, and then click Delete Rate. The system deletes the record and updates the Rates list.

Setting Up Fleet Customers

Set up fleet customers to use throughout the Fleet Management system. Set up billing details to determine the costs for which the customer is billed.

Follow these steps to set up fleet customers.

1 Open the Fleet Customers form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Organization—Enter the organization to which the fleet customer belongs if you use multi-organization security.
4 Fleet Customer—Enter the name of the fleet customer, and then enter a description of the fleet customer in the adjacent field.
5 Class—Enter the class to which the fleet customer belongs.
The system automatically populates Class Org.
6 Billable—Select if the customer will be billed.

   Note: You must select Billable to generate bills for the customer.

7 Out of Service—Select to prevent the fleet customer from being displayed in the lookups.
8 Bill for No Charges—Select to print a bill by default when the bill is for $0.
9 Maintenance Labor—Select to bill for maintenance labor.
10 Maintenance Contract Labor—Select to bill for maintenance contract labor.
11 Maintenance Parts—Select to bill for maintenance parts.
12 Fuel—Select to bill for fuel.
13 Mileage—Select to bill for mileage.
14 Usage—Select to bill for usage.
15 Non-maintenance Labor—Select to bill for non-maintenance labor.
16 Non-maintenance Contract Labor—Select to bill for non-maintenance contract labor.
17 Non-maintenance Parts—Select to bill for non-maintenance parts.
18 Insurance—Select to bill for insurance.
19 Exceptions—Select to bill for exceptions.
20 Click Save Record. The system saves the record.

Associating Cost Codes with Fleet Customers

Associate cost codes with fleet customers to correctly display transaction costs on fleet bills.

Follow these steps to associate cost codes with fleet customers.

1 Open the Fleet Customers form. The system displays the List View page.
2 Select the fleet customer with which to associate cost codes, and then click the Cost Codes tab. The system displays the Cost Codes page.

3 Click Add Cost Code. The system inserts a new Cost Code Details record.

4 Cost Code—Enter the cost code with which to associate the fleet customer. The system automatically populates the cost code description.

5 Click Submit . The system saves the record and updates the Cost Codes list.

   Note: To delete a cost code, select the cost code to delete, and then click Delete Cost Code. The system deletes the record and updates the Cost Codes list.

   You can only associate a cost code with one fleet customer.

Associating Billing Codes with Fleet Customers

Associate billing codes with fleet customers. By associating a specific billing code with a specific fleet customer, you determine the rate for a specific billing category. Together billing codes and markup codes, when associated with specific fleet customers, determine the total rates for fleet billing categories such as usage and mileage.

Follow these steps to associate billing codes with fleet customers.

1 Open the Fleet Customers form. The system displays the List View page.

2 Select the fleet customer with which to associate billing codes, and then click the Billing Codes tab. The system displays the Billing Codes page.

3 Click Add Code. The system inserts a Billing Details record.

4 Billing Code—Enter the billing code with which to associate the fleet customer. The system automatically populates the billing code description.

5 Markup Code—Enter the markup code with which to associate the fleet customer. The system automatically populates the markup code description.

   Note: You must enter a Billing Code and/or a Markup Code.

6 Equipment Type—Select the equipment type with which to associate the fleet customer.

7 Equipment Class—Enter the equipment class with which to associate the fleet customer. The system automatically populates the equipment class description and **Equip. Class Org.**

8 Equipment Category—Enter the equipment category with which to associate the fleet customer. The system automatically populates the equipment category description.

9 Maintenance Labor—Select to bill for maintenance labor.

10 Maintenance Contract Labor—Select to bill for maintenance contract labor.

11 Maintenance Parts—Select to bill for maintenance parts.

12 Fuel—Select to bill for fuel.

13 Mileage—Select to bill for mileage.

14 Usage—Select to bill for usage.

15 Non-maintenance Labor—Select to bill for non-maintenance labor.

16 Non-maintenance Contract Labor—Select to bill for non-maintenance contract labor.

17 Non-maintenance Parts—Select to bill for non-maintenance parts.

18 Insurance—Select to bill for insurance.

19 Exceptions—Select to bill for exceptions.

20 Click Submit. The system saves the record and updates the Billing Codes list.

Viewing Billing Histories for Fleet Customers

Views all previously generated bills, or view a specific billing cycle by entering a Period End Date. Fleet bill charges are summarized to the unique fleet customer cost code and vehicle level. Charges are displayed by the following categories: Usage, Mileage, Maintenance, Non-maintenance, Fuel, Insurance, and Exceptions. The system also displays a total charge for each bill line, a subtotal, which summarizes the charges for all bill lines by category, an adjustment line, which summarizes all adjustments entered for previous bills that are included in the selected bill, grand totals of each of the charge categories, and a total bill charge. You can also select to print bills and view current charges.

Note: When filtering the billing histories, Subtotals and Totals may change; 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.

Follow these steps to view billing histories for fleet customers.

1 Open the Fleet Customers form. The system displays the List View page.

2 Select the fleet customer for which to view billing history, and then click the Billing History tab. The system displays the Billing History page.

3 Period End Date—Enter the period end date for which to view a bill for a specific fleet customer.

The system automatically populates Bill No.

Click Current Charges to view billing details from the current billing period's start date through the system date (today). If a past period needs to be billed, the system cannot display current period data.

Click Print Bill to print the bill. You must enter a Period End Date to print the bill.

You cannot print current charges.

4 View the billing history.

Viewing Fleet Bill Transactions for Fleet Customers

View individual transaction information for specific billing categories. For example, select Usage as the Category, and then click View Transactions. The system displays the specific usage transactions that make up the usage subtotal for the selected line. This includes usages charges and usage markup charges.

Follow these steps to view fleet bill transactions for fleet customers.

1 Open the Fleet Customers page. The system displays the List View page.

2 Select the fleet customer for which to view fleet bill transactions, and then click the Billing History tab. The system displays the Billing History page.

3 Period End Date—Enter the period end date for which to view fleet bill transactions for a specific fleet customer, and then select the bill line for which to view bill transactions for fleet customers. The system automatically populates Bill No.

4 Select the fleet bill line for which to view fleet bill transaction for fleet customers.

Note: You must enter a Period End Date and select a bill line to view fleet bill transactions.

You cannot view fleet bill transactions for current charges.

5 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.

6 Click View Transactions. The system displays the Transactions popup for the specific category of charges.

7 View the charges for the specific transaction category.

Viewing Fleet Bill Adjustment Transactions for Fleet Customers

View individual adjustment transaction information for specific billing categories. For example, select Usage as the Category, and then click View Adjustment Transactions. The system displays the specific usage adjustment charges that make up the entire bill. This includes usages adjustment charges and usage markup charges. The system displays all adjustments related to the bill and category.

Follow these steps to view fleet bill adjustment transactions for fleet customers.

1 Open the Fleet Customers form. The system displays the List View page.

2 Select the fleet customer for which to view fleet bill adjustment transactions, and then click the Billing History tab. The system displays the Billing History page.

3 Period End Date—Enter the period end date for which to view fleet bill adjustment transactions for a specific fleet customer, and then select the bill line for which to view fleet bill adjustment transactions for specific customers.
The system automatically populates Bill No.

You must enter a Period End Date to view fleet bill adjustment transactions.

You cannot view fleet bill adjustment transactions for current charges.

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.
- Fuel—Select to show fuel charges only.
- Insurance—Select to show insurance charges only.
- Exceptions—Select to show exception charges only.

5 Click View Adjustment Transactions. The system displays the Usage Adjustment Transactions popup for the specific category of charges.

6 View the charges for the specific adjustment transaction category.

Replacing Fleet Cost Codes

Replace non-billable cost codes on all fleet transactions that will be billed to a fleet customer on the next bill. Replace cost codes on transactions before bills are generated and sent to the general ledger.

First, search cost codes for non-billable cost codes that are associated with at least one fleet transaction (work order, inventory transaction, vehicle ticket, or ticket adjustment) that will be billed in the next scheduled billing period and are not currently locked for replacement by another user. Next, replace existing code values with new cost code values for the appropriate transactions.

Note: You must have query privileges on the Fleet Cost Code Search & Replace form for the cost code organization in order to search and replace cost codes.

Follow these steps to replace fleet cost codes.

1 Open the Fleet Cost Code Search & Replace form. The system displays the Cost Codes page.

2 Click Search. The system searches for non-billable cost codes that are associated with at least one fleet transaction that will be billed in the next scheduled billing period.
The system calculates the number of transactions associated with the non-billable cost code for the current period.

Note: The system only displays non-billable cost codes that are associated with at least one fleet transaction that will be billed in the next scheduled billing period and are not currently locked for replacement by another user.

You cannot search and replace cost codes for billed transactions.

You cannot search and replace cost codes for periods that are past due and unbilled.

3 New Cost Code—Enter a new cost code for every **Current Cost Code** that must be replaced.

4 Remove—Select to remove the record from the grid.
Refer to Viewing Cost Code Errors.

Note: To remove all of the transactions at once, select Remove. To unselect all the line items at once, unselect Remove.

5 Click Replace. The system replaces the the current cost codes with the new cost codes for all fleet transactions that will be billed in the next billing process.

> **Note:** You must enter New Cost Codes before clicking Replace.

Viewing Cost Code Errors

View all errors that occurred during the cost code search and replace process.

Follow these steps to view cost code errors.

1 Open the Fleet Cost Code Search & Replace form. The system displays the Cost Codes page.
2 Select the record for which to view cost code errors, and then click the Errors tab. The system displays the Errors page.
3 View the cost code error information.

Archiving Management

<div style="text-align: right">**8**</div>

Archive work orders, purchase orders, stock transactions, electronic records, and audit trail records.

> ⭐ **Important:** This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Archiving Records

Archive work orders, purchase orders, stock transactions, electronic records, and audit trail records.

Note: The archive process removes archived items from normal view. The items are added to separate archive tables.

Archived items will no longer be available for reports or budgets.

Follow these steps to archive records.

1 Open the Archive Records form. The system displays the List View page.
2 Click New Record. The system inserts a new record and displays the Record View page.
3 Archive Through—Enter the date through which to archive.
4 Work—Select to archive work orders where System Status=C and Date Completed <=Archive Through. The system archives the following in connection to work order and work order activities:

Archived Items
Qualifications
Schedules
Additional charges
Material Lists with Event
Pick Lists for the WO
Booked hours
Quotations with Services for the WO
Purchase Orders with Direct Materials for WO Activities
Repair Parts

Archived Items
Calculated costs for the WO
Costs
Instruments (Calibration)
Standards (Calibration)
Systems (VMRS)
Test Points (Calibration)
Aspects (Inspection)
Points (Inspection)
Linear References
Account Details
Matched invoices for POs
Requisitions with WO on header
Quotations that reference the Requisition
Receipts for Direct Materials for WO Activities
Dock Receipts for Direct Materials for WO Activities
Issues/Returns for WO Activities
Supplier Evaluations for WO Activities
Warranty Claims for WO Activities
Reservations for WO Activities
Tools requested for WO Activities
Tool Usage for WO Activities
Customer Contracts for the WO
Customer Invoices with lines for the WO
Fixed payments for the customer contract
Dispatches for standing WO Activities

Note: The system only archives those with an approved or completed status.

5 Purchasing—Select to archive purchasing transactions. The system archives the following related to archived invoices:

Archived Items
Invoices with Matched or Cancelled status

Archived Items
Lines
Extra charges and discounts
Extra charges for costs tab
Invoice allocations
Account details

The system archives the following related to archived purchase orders:

Archived Items
PO Headers-Order clauses, lines, extra charges, revisions
Blanket Orders
Booked Hours
Dock receipts
Packing slips
Invoices
Order Tracking
Supplier Evaluation

The system archives the following related to archived requisitions:

Archived Items
Requisitions headers with Approved or Cancelled status
Lines
WOs
WO repair parts referencing the Requisition/Requisition line
Warranty claims referencing the Requisition/Requisition line
Transactions

The system archives the following related to archived quotations:

Archived Item
Quotation headers and lines

6 Stock Transactions—Select to archive stock transactions with a status of Approved or Cancelled. The system archives the following related to stock transactions:

Archived Items
Issues/Returns
Price Correction
Manual Price Type Change
Return for Repair
Stocktake with Approved or Cancelled status

7 Audit Trail—Select to archive the audit trail, a history of changed records.

8 Electronic Records—Select to archive electronic records.
The system archives the following shared tables related to archived work orders, work order transactions, purchasing transactions, and stock transactions.

Archived Items
Descriptions
Audit Trail Records
Electronic Signatures
Event Addresses
Documents
Comments
Custom Fields
Associated Parts
Permits
Account Details

Note: Select a value from 0 to 23 for the ARCHTIME install parameter to schedule a time for the archive process to run between 12:00 AM and 11:00 PM, e.g., for 12:00 AM, select 0 and for 11:00 PM, select 23.

Set the ARCHTIME to null to let the archive process run immediately on clicking Start.

9 Click Start to begin the archive process.
The system automatically populates Archive Number, Date Started, Date Completed, Date Stopped, Scheduled Time, and Archived By.

10 The system saves the archive record.

Note: Click Status to view the number of records archived.

Click Stop to halt the archive process. This will stop the process but will not cancel the process. The system will finish archiving the current record before stopping. The transactions already archived will not roll back.

Viewing Archive Results

Follow these steps to view archive results.

1 Open the Archive Records form. The system displays the List View page.

2 Click the tab corresponding to the archive results you wish to view. The system displays the selected page.

3 View the archive results.

Basic Module Data Creation

<div style="text-align: right; color: red; font-size: large;">**9**</div>

Setting up basic module data is a simplified initial setup process. These setup forms are available for both Business Edition and Enterprise Edition. These options can also be defined as installation parameters. For more detailed information regarding installation parameters and initial setup, refer to Chapter 1 System Configuration in the *System Administrator's Guide*.

Defining Administration Setup

Define administration setup options to format the module to your specifications.

Follow these steps to define administration setup.

1 Open the Administration Setup form. The system displays the Options page.

2 Line Number Increment(INCRLINO)—Enter the value by which to increase the line number when automatic line numbering is activated.

3 Minimum Password Length(PASSMINL)—Enter the minimum number of characters allowed for a system password.

4 Password Duration Days(SECUPWEP)—Enter the number of days in the password expiration period.

5 Reuse Password Days(SECUPWRP)—Enter the number of days before a user can reuse an expired password.

6 Infor EAM CD Key(CDKEY)—Enter the Infor EAM CD Key.

7 Infor EAM Consumer Reports CD Key(CDKEY)—Enter the Infor EAM Consumer Reports CD key.

8 Infor EAM Report Author CD Key—Enter the Infor EAM Report Author CD key.

9 Infor EAM Requestor CD Key(CDKEY)—Enter the Infor EAM Requestor CD key.

10 Infor EAM Barcoding CD Key(7IBCDKEY)—Enter the Infor EAM Barcoding CD key.

11 User Lock Attempts(SECUVIOL)—Enter the number of consecutive password violations that can occur before a user is locked out of the system. The system administrator must unlock the user.

12 Mixed Case Passwords(PASSUPER)—Select Yes or No to indicate whether the system allows mixed case for password verification. If NO, the system does not use mixed case in password verification. If YES, the system uses mixed case in password verification.

13 Tab Save Behavior(TABSAVE)—Select Insert to return to Insert Mode after modifying a record on List/Detail tabs. Select Update to stay in Update Mode after modifying a record.

14 Database Name(DBNAME)—Enter your database name, i.e. "Production," "Development," or "Test."

15 Company Name(OURCOMP)—Enter the name that appears on reports.

16 Report Attachment Upload Directory(ADRDOCUP)—Enter the document upload directory.

17 Application Server URL(APPURL)—Enter the URL path for the application server.

18 E-mail Sender(SMTPSEND)—Enter the name of the e-mail sender used by Infor EAM.

19 E-mail Server(SMTPSERV)—Enter the name or IP address of the SMTP e-mail server.

20 Conversion Database Tablespace—Enter a separate data tablespace for all conversion data.

21 Conversion Index Tablespace—Enter a separate index tablespace for all conversion data.

22 Web User Authentication Method—Select the method for authenticating an Infor EAM web user. Select Standard to use the credential defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

23 Web Service Authentication Method—Select the method for authenticating an Infor EAM Connector web service user. Select Standard to use the credentials defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

24 Mobile User Authentication Method—Select the method for authenticating an Infor EAM Mobile user. Select Standard to use the credentials defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

25 Databridge Authentication Method—Select the method for authenticating an Infor EAM Databridge user. Select Standard to use the credentials defined on the user's records in Infor EAM. Select LDAP to use the credential defined in the LDAP provider configured for Infor EAM deployment. Select External to use an external authentication service configured for Infor EAM deployment.

26 Enable/Disable KPI Driver—Click to enable or disable KPI driver.

27 Enable/Disable E-mail Driver—Click to enable or disable e-mail driver.

28 Click Save Record. The system saves the record.

Defining Equipment Setup

Define equipment setup options to format the module to your specifications.

Follow these steps to define equipment setup.

1 Open the Equipment Setup form. The system displays the Options page.

2 Auto-number Assets (AUTOANUM)—Select Yes or No to indicate whether the system automatically generates asset numbers.

3 Click Save Record. The system saves the record.

Defining Equipment Statuses for Equipment Setup

Define statuses for equipment. Equipment status indicates the state of the equipment listed.

Follow these steps to define equipment statuses for equipment setup.

1 Open the Equipment Setup form. The system displays the Options page.

2 Click the Equipment Statuses tab. The system displays the Equipment Statuses page.

3 Click Add Status. The system inserts a new Status Details record.

4 Status—Enter a user code for the equipment status, and then enter a description in the adjacent field.

5 System Status—Enter the system status.
The system automatically populates the system status description.

6 System Default—Select to set the system default to the current code.

7 ClickSubmit. The system saves the record and updates the Equipment Statuses list.

Defining Equipment Types for Equipment Setup

Define types for equipment. Equipment types indicate the use of the equipment listed.

Follow these steps to define equipment types for equipment setup.

1 Open the Equipment Setupform. The system displays the Options page.

2 Click the Equipment Types tab. The system displays the Equipment Types page.

3 Click Add Type. The system inserts a new Type Details record.

4 Type—Enter a user code for the equipment type, and then enter a description in the adjacent field.

5 System Type—Enter a code for the system type.

- A (Assets)
- C (Category)
- L (Location)
- S (System)

6 System Default—Select to set the system default to the current code.

7 Click Submit. The system saves the record and updates the Equipment Types list.

Note: To delete a type, select the type to deleted, and then click Delete Type. The system deletes the record and updates the Equipment Types list.

Defining Equipment Criticality for Equipment Setup

Follow these steps to define equipment criticality for equipment setup.

1 Open the Equipment Setup form. The system displays the Options page.

2 Click the Equipment Criticality tab. The system displays the Equipment Criticality page.

3 Click Add Code.

4 Code—Enter a user code for the equipment criticality, and then enter a description in the adjacent field.

5 System Default—Select to set the system default to the current code.

6 Click Submit. The system updates the record.

Note: To delete a code, click the appropriate code, and then click Delete Code. The system removes the code.

Defining Purchasing Setup

Define purchasing setup options to format the module to your specifications.

Follow these steps to define purchasing setup.

1   Open the Purchasing Setup form. The system displays the Options page..
2   Allow Over Receipt (OVERRECV)—Choose one of the following options to indicate whether the system allows for items to be purchased over the receipt limit:

   •   If Yes, allow to receive more than ordered.

   •   If No, do not allow to receive more than ordered.

3   Auto-populate Quantity to Receive (RECVAUTO)—Select Yes or No to indicate whether the system automatically populates the quantity to receive on the PO Receipt form.
4   Default PO Receipt Description (DOCKDESC)—Enter the default PO receipt description.
5   Default Purchase Order Description (PORDDESC)—Enter the default purchase order description. Changing the value does not affect existing data.
6   Default Requisiton Description (REQDESC)—Enter the default requisition description.
7   Click Save Record. The system saves the record.

Defining Expense Types for Purchasing Setup

Define expense types for purchasing. Expense types indicate the use of the expense listed.

Follow these steps to define expense types for purchasing setup.

1   Open the Purchasing Setup form. The system displays the Options tab.
2   Click the Expense Types tab. The system displays the Expense Types page.
3   Click Add Type. The system inserts a new Type Details report.
4   Type—Enter a user code for the expense type, and then enter a description in the adjacent field.
5   System Default—Select to set the system default to the current code.
6   Click Submit. The system saves the record and updates the Expense Types list.

Note: To delete a type, select the type to delete, and then click Delete Type. The system deletes the record and updates the Expense Types list.

Defining Requisition Statuses for Purchasing Setup

Define statuses for requisitions. These statuses indicate the state of the requisitions.

Follow these steps to define requisition statuses for purchasing setup.

1 Open the Purchasing Setup form. The system displays the Options page.
2 Click the Requisition Statuses tab. The system displays the Requisition Statuses page.
3 Click Add Status. The system inserts a new Status Details record.
4 Status—Enter a code for the requisition status, and then enter a description in the adjacent field.
5 System Type—Enter one of the following system types:

- A (Approved)
- C (Cancelled)
- R (Awaiting Approval)
- U (Unfinished)

6 System Default—Select to set the system default to the current code.
7 Click Submit. The system saves the record and updates the Requisition Statuses list.

Defining Purchase Order and Transaction Statuses for Purchasing Setup

Define statuses for purchase orders and transactions. These statuses indicate the state of the purchase orders and transactions.

Follow these steps to define purchase order and transaction statuses for purchasing setup.

1 Open the Purchasing Setup form. The system displays the Options page.
2 Click the PO and Transaction Statuses tab. The system displays the PO and Transaction Statuses page.
3 Click Add Status. The system inserts a new Status Details record.
4 Status—Enter a user code for the purchase order and transaction status, and then enter a description in the adjacent field.
5 System Type—Enter one of the following system types:

- A (Approved)
- C (Cancelled)
- R (Awaiting Approval)
- U (Unfinished)

6 System Default—Select to set the system default to the current code.
7 Click Submit. The system saves the record and updates the PO and Transaction Statuses list.

Defining Materials Setup

Define materials setup options to format the module to your specifications. These options were formerly defined as installation parameters.

Follow these steps to define material setup.

1 Open the Materials Setup form. The system displays the Options page.

2 Automatically Associate Parts(AUTOPART)—Select Yes or No to indicate whether the system automatically updates the Parts Associated list for equipment.
Refer to Associating Parts Chapter 1 Basics of the Infor EAM User's Guide.

Note: Update the Parts Associated list for approved lines on a receipt. If AUTOPART is set to AUTO, the system verifies whether the received part is associated with an equipment's Parts Associated list when a purchase order receipt is approved for a work order. If the received part is not associated with the equipment's Parts Associated list, the system adds the part to the list using the quantity of the transaction as the Parts Associated quantity.

If the part is already associated on the Parts Associated list, the system updates the quantity of the part on the Parts Associated list to the transaction quantity if the transaction quantity is greater than the existing quantity on the Parts Associated list. If the transaction quantity is not greater, then the system does not make any updates. This association applies to issues, not just receipts.

3 Auto-number Parts (AUTOPNUM)—Select Yes or No to indicate whether the system automatically generates part numbers.

4 Default Transaction Description (TRANSDESC)—Enter the default transaction description.

5 Click Save Record. The system saves the record.

Defining Work Setup

Define work setup options to format the module to your specifications.

Follow these steps to define work setup.

1 Open the Work Setup form. The system displays the Options page.

2 Book Days (COMDAYS)—Enter the number of days during which you can book hours on closed work orders. Infor recommends a minimum value of 1. Changing the value does not affect existing data.

3 Issue Days (ISSDAYS)—Enter the number of days for which issues can be made after you close a work order. Valid values are any non-negative numbers. Changing the value does not affect existing data.

4 Return Days (RTNDAYS)—Enter the number of days that parts can be returned to the store after the work order has been closed. Valid values are any non-negative numbers. Changing the value does not affect existing data.

5 Tool Days (TOOLDAYS)—Enter the number of days to update tool usage costs after completion of a work order.

6 Non-Work Order Days (NPRDAYS)—Enter the number of days for which you can book past nonproductive hours, which is labor performed without a work order. Changing the value does not affect existing data.

7 Cascade Work Order Status (EVTCASCD)—Select Yes or No to indicate whether changing a parent work order's status to Closed or Cancelled causes the status of child work orders also to change.

8 Enforce Work Order Dates (BOOKDATE)—Select Yes or No to indicate whether to enforce date constraints when booking hours. If set to No, the system ignores the constraints. If set to Yes, the system enforces the constraints.

Note: Setting this parameter OFF may result in inconsistencies within your booked hours data.

9 Click [save icon]. The system saves the record.

Defining Work Order Priorities for Work Setup

Define work order priorities. These priorities indicate the order in which work orders should be completed.

Follow these steps to define work order priorities for work setup.

1 Open the Work Setup form. The system displays the Options page.
2 Click the Work Order Priorities tab. The system displays the Work Order Priorities page.
3 Click Add Code. The system inserts a new Code Details record.
4 Code—Enter a user code for the work order priority, and then enter a description in the adjacent field.
5 System Default—Select to set the system default to the current code.
6 Click Submit. The system saves the record and updates the Work Order Priorities list.

Note: To delete a code, select the code to delete, and then click Delete Code. The system deletes the record and updates the Code list.

Defining Work Order Statuses for Work Setup

Define work order statuses. These statuses indicate the state of existing work orders.

Follow these steps to define work order statuses for work setup.

1 Open the Work Setup form. The system displays the Options page..
2 Click the Work Order Statuses tab. The system displays the Work Order Statuses page.
3 Click Add Status. The system inserts a new Status Details record.
4 Status—Enter a user code for the work order status, and then enter a description in the adjacent field.

- A (Approved)

- C (Cancelled)

- R (Awaiting Approval)

- U (Unfinished)

5 System Status—Enter a code for the system status.
The system automatically populates the system status description.

6 System Default—Select to set the system default to the current code.

7 Click Submit. The system saves the record and updates the Work Order Statuses list.

Defining Work Order Types for Work Setup

Define work order types. These types indicate the condition of existing work orders.

Follow these steps to define work order types for work setup.

1 Open the Work Setup form. The system displays the Options page..

2 Click the Work Order Types tab. The system displays the Work Order Types page.

3 Click Add Type. The system inserts a new Type Details record.

4 Type—Enter a user code for the work order type, and then enter a description in the adjacent field.

5 System Type—Enter a code for the system type.

- A (Assets

- C (Category)

- L (Location)

- S (System)

6 System Default—Select to set the system default to the current code.

7 Click Submit. The system saves the record and updates the Work Order Types list.

Installation Parameters

A

The tables in this appendix display a list of parameters for Infor Enterprise Asset Management and the add-on products available for Infor Enterprise Asset Management including the installation code, an example of a valid parameter value, and a description of how the system uses the code.

> ⭐ **Important:** This chapter describes Infor Enterprise Asset Management functions that only a system administrator has rights to perform.
>
> This chapter covers functionality available in Infor10 Enterprise Asset Management Enterprise Edition and Infor10 Enterprise Asset Management Sustainability Edition. If you purchased Infor10 Enterprise Asset Management Business Edition, you do not have access to all of the functionality covered in this chapter.

Understanding Installation Parameters

During the Infor EAM installation process, installation parameters enable different modules/system components and establish many default values for your system, such as multi-organization security, part pricing, etc. Part of the installation process involves running scripts that set these default values in the Infor EAM database, and many of the scripts contain values known as installation codes or parameters.

This appendix contains a complete listing of all the installation parameters used for Infor EAM broken down by modules, as well as codes related to add-on modules and other advanced system features.

Many of the parameters set during installation are "fixed," which means that once the parameter is set, the value/setting of the parameter cannot be changed or modified. Fixed parameters are also designated in the tables below.

Unless otherwise indicated, all non-fixed parameters can be set as necessary following the Infor EAM installation to tailor your system environment. Refer to "Defining Installation Parameters" on page 11.

Barcode Parameters

Barcoding is an add-on module for both Infor EAM (Oracle Forms) and/or Infor EAM that enables you to design and print barcode labels for assets, parts, work orders, etc.

Set values for barcode parameters according to the following table. For more information on setting values for parameters, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
BARCODB	B	This code indicates the prefix of the barcode bin.	Yes
BARCODL	L	This code indicates the prefix of the barcode lot.	Yes
BARCODN	N	This code indicates the prefix of the serial number of the barcode equipment.	Yes
BARCODO	O	This code indicates the prefix of the barcode equipment.	Yes
BARCODP	P	This code indicates the prefix of the barcode part.	Yes
BARCODS	S	This code indicates the prefix of the barcode store.	Yes
BARCODV	V	This code indicates the prefix of the barcode physical inventory.	Yes
BARCODW	W	This code indicates the prefix of barcode of work order and activity.	Yes
BARFILL	#	Single-character filler between a work order and activity bar code	No

Base Parameters

Base parameters are related to core system components and features that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly. Base parameters also include settings for Databridge.

Set values for base parameters according to the following table. For more information on setting values for parameters, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
$BTRACE	No	Enables the BAIM trace utility. Set the parameter to Yes to enable the trace functionality. Set the parameter to No to disable the trace functionality. The default val-	No

Code	Example	Description	Fixed
		ue for this parameter is `No` and should only be set to `Yes` at the request of a customer support technician.	
$CATSF	1	Financial Parameter for Category code for type `SF`	No
$CATSH	1	Financial Parameter for Category code for type `SH`	No
$CATST	1	Financial Parameter for Category code for type `ST`	No
$LTRCDIR	F:\BAIMTRACE	Identifies the trace file directory created on the Infor EAM server for the insertion of trace files for local transactions The value used in this parameter should be from the perspective of someone looking at a command prompt on the server. Do not use the value of a mapped drive.	No
$REQNUM	YES	Parameter for Requisition Number from Infor EAM to be sent to `APPS`	No
$RTRCDIR	F:\BAIMTRACE	Identifies the trace file directory created on the Oracle Applications server for the insertion of trace files for remote transactions You must only specify a value for `$RTRCDIR` for implementations in a distributed environment. The value used in this parameter should be from the perspective of	No

Code	Example	Description	Fixed
		someone looking at a command prompt on the server. Do not use the value of a mapped drive.	
$SERVUOM	EA	Unit of Measure for Service types to be sent to APPS	No
$SFLTYPE	1	Financial Parameter for Line type for type SF	No
$STLTYPE	1	Financial Parameter for Line type for type SH, ST	No
@ADDPO	Y	This code indicates whether the Databridge Add PO (Outbound) transaction is activated.	No
@ADDREQ	Y	This code indicates whether the Databridge Add Requisition transaction is activated.	No
@CANPO	Y	This code indicates whether the Databridge Cancel PO (Outbound) transaction is activated.	No
@CANPORL	N	This code indicates whether the Databridge Cancel requisition lines for Cancel PO (Inbound) transaction is activated.	No
@CANREQ	Y	This code indicates whether the Databridge Cancel Requisition transaction is activated.	No
@CHGPO	Y	This code indicates whether the Databridge Change PO (Outbound) transaction is activated.	No
@CHGREQ	Y	This code indicates whether the Databridge Change Requisition activated.	No

Code	Example	Description	Fixed
@DBPID	2	Databridge DUNS+4 partner ID	Yes
@DOCKREC	N	Indicates whether the Databridge ReceivePO transaction will support on-dock receipts. Set to Y to enable on-dock receipts for the ReceivePO transaction.	No
@LDPAY	Y	This code indicates whether the Databridge Load Payable (Outbound) transaction is activated.	No
@NEWACT	N	This code indicates whether to automatically create an activity when INFOREAM.ACT tag is null.	No
@NEWPART	N	This code indicates whether to automatically create a new part when ITEM tag is null.	No
@NITMOUT	N	This code indicates whether the Databridge Sync Item (Outbound) transaction exports temporary parts.	No
@PORECV	Y	This code indicates whether the Databridge Receive PO (Outbound) transaction is activated.	No
@SYNCITM	Y	This code indicates whether the Databridge Sync Item (Outbound) transaction is activated.	No
@SYNCPRJ	Y	This code indicates whether the Databridge Sync Proj Info (Outbound) transaction is activated.	No
@SYNCRES	Y	This code indicates whether the Databridge	No

Code	Example	Description	Fixed
		Sync Reservation transaction is activated.	
@SYNCWO	Y	This code indicates whether the Databridge Sync Maint Order transaction is activated.	No
@UPDINV	Y	This code indicates whether the Databridge Update Invy (Outbound) transaction is activated.	No
@UPDPTM	Y	This code indicates whether the Databridge Update person time (Outbound) transaction is activated	No
~QUEUES~	1	Number of concurrent queues	No
~SLEEP~	15	This code indicates the interval time (in seconds) for the BDRV driver.	No
~SLEEPB0	86400	This code indicates the interval time (in seconds) for BDRV queue 0.	No
~SLEEPT0	3600	This code indicates the interval time (in seconds) for TDRV queue 0.	No
7IACDKEY	000-0000-00000-XXXX	Infor EAM CD key	No
7IBCDKEY	000-0000-00000-0000	Infor EAM Barcode module CD key	No
7ICCDKEY	000-0000-00000-XXXX	Infor EAM Reports Consumer CD Key	No
7IMCDKEY	000-0000-00000-000A	Infor EAM Mobile CD key	No
7IPCDKEY	000-0000-00000-XXXX	Infor EAM Reports Author CD Key	No
7IWCDKEY	000-0000-00000-000C	Infor EAM Connector CD key	No

Code	Example	Description	Fixed
ACCOUNT	YES	This code indicates whether accounting information is to be upgraded to use the `DR/CR` format `(YES)` or uses * for all accounts `(NO)`.	No
ADVREPT	YES	Indicates whether you are using the Infor EAM Advanced Reporting or another reporting product. Set to `YES` to indicate that you are using the Advanced Reporting Module. Set to `NO` if you are using another reporting product or Crystal Clear Reporting.	No
AMSGCOST	250	Indicates the maximum allowable SQL score for Alert Management grid Dataspies.	No
ARCHTIME	2	This code indicates the time of day at which the archiving process runs. Values are in 24-hour time (0-23). The default is '`2`' (2:00 A.M.) Leave this value blank to execute the archiving process immediately.	No
ARCREC	NO	This code indicates whether Infor EAM stores error records from the data collection module in table `R5ARCIN TERRORS`. If set to `YES`, the system stores the records in `R5ARCINTER RORS`. If set to `NO`, the system does not store the records.	No
ASDEPTYP	SL	Default depreciation method: This code indicates the default depreci-	No

Code	Example	Description	Fixed
		ation method for asset depreciation. However, you can also set the depreciation method at the organization level. SL= straight line SYD=sum of years digits DDB=double declining balance UOO= units of output	
AUTOANUM	NO	This code indicates whether Infor EAM automatically generates asset numbers.	-
AUTOKBNM	NO	This code indicates whether the system auto-generates knowledge base article codes. Valid values are 'YES' and 'NO.'	No
BRETRIES	5	Maximum number of retries in the BDRV driver.	No
CASCADE	YES	This code indicates whether cascading occurs for cost code changes made on the equipment forms (Asset, Position, System) to the Equipment tab of the PM form.	No
CDKEY	000-00A0-00000-B0C0	CD key code. Enter the number from the CD label in MP5SET.SQL when installing the Infor EAM Oracle database.	No
CDKEYREQ	000-00A0-00000-B0C0	Infor EAM Requestor CD key code.	No
CGMPONLY	NO	This code indicates whether Infor EAM will create an electronic record and/or require an	No

Code	Example	Description	Fixed
		electronic signature for work performed on `cGMP` equipment. To configure electronic records and signatures for `cGMP` equipment, you must set this parameter to `YES` and set up electronic records and signatures for the `EVNT` entity.	
		If `CGMPONLY` is set to `YES` and you have configured electronic records/signatures for the `EVNT` entity, Infor EAM will only create an electronic record and/or require an electronic signature for any work orders created for `cGMP` equipment.	
		If `CGMPONLY` is set to `NO` and you have configured electronic records and signatures for the `EVNT` entity, Infor EAM will create electronic records and/or require an electronic signature for all work performed on any equipment.	
`CSVDATEF`	`YYYY-MM-DD`	`CSV` Export date format. This is the java format of the date fields to be exported.	No
`DBNAME`	`Production`	This code identifies your database, such as `'Production'`, `'Development'` or `'TEST'`. The install parameter also supports the use of four standard variables: `MP5USER`, `:MP5DFLTORG,`	No

Code	Example	Description	Fixed
		`:MP5GROUP,` and `:MP5ORG.`	
DEFCALLR	4	This code defines the default value for Find Caller By on Service Request. `1` = E-mail, `2` = Customer, `3` = Name, `4` = Phone. Valid values are `1`, `2`, `3`, and `4`.	No
DEFCURR	EUR	Base currency. All rates for other currencies refer to this default currency. Do not change this setting once in use.After you set this default, you cannot change it without introducing inconsistencies to the database.	No
DEFLANG	FR	Base language. Infor EAM uses this parameter during installation. Do not change this setting once in use.After installation, you cannot change this value because Infor EAM cannot retrieve certain system records in an alternative language.	Yes
DEFORG	*	Default Organization value for entities with multi-organization security set to `OFF`.	Yes
DUALCURR	EUR	Dual currency. `EUR` indicates whether to use the triangular conversion method to convert currency amounts to and from `EURO` currency.	No
EPAKURL	http://www.google.com/?what=yes	URL path for the EPAK server. This path will be used to display `EPAK` content for Infor EAM.	No

Code	Example	Description	Fixed
ESMONTHS	3	Number of months for which to (re)calculate Energy Star readings. For example, if the current month is May and the number of months is set to 3, then readings will be created for February, March, and April.	No
FAAMOD	OFF	This code indicates whether the user must enter a Certification Number and Certification Type for electronic signatures, which are required by the Federal Aviation Administration (FAA) for electronic signatures. Certification numbers and types are associated with employee records on the Qualifications tab of the Employee form.	No
FRONTPG	YES	Print front page code. This code indicates the default value for Include Front Page on the Print dialog box. The default value for this parameter is YES. If the parameter is set to YES, Include Front Page is selected by default. If the parameter is set to NO, Include Front Page is unselected by default.	No
GRIDCOST	100	SQL score for Dataspys	No
HOSTED	–	This code indicates whether the installation is hosted.	Yes
HTMLCOMM	OFF	Set to ON to display the HTML editor bar on the	No

Code	Example	Description	Fixed
		Comments page. Set to OFF to hide the HTML editor bar.	
INBXSCOR	100	SQL score for inbox queries. The setting of this parameter determines whether or not the system will allow inbox queries to run that do not have a sufficient score.	No
INCRLINO	1	Increment value. Enter the value by which to increase the line number when automatic line numbering is activated.	No
INSPCFV	NO	Indicates whether to use the inspection type C, F, V in Infor EAM Mobile. Valid values are YES or NO.	No
INSTCODE	YD04O5VXVXY2	Installation code. Infor EAM uses it for several internal checks.Do not change this code.Infor EAM will not function if you modify this code.	Yes
KEEPBOT	+	Keep boiler texts. A + value indicates Infor EAM will not overwrite user-adapted boilertexts when you upgrade the system.	No
KPISCOR	100	SQL score for KPI queries.	No
KPISLEEP	1	Enter, in days, how often the KPI driver (KDRV) checks for data to process. Must be a positive integer.	No
LDAPPATH	OFF	Enables the LDAP server component for Infor EAM.	No

Code	Example	Description	Fixed
LDAPSERV	`http://myserver.mycompany.com:8080/oc4jldap/LDAPAuth`	The URL identifying the location of the LDAP servlet.	No
LGNCON	`STD`	This code stores the login authentication method used for the EAM Connector (web services) users. Set to `STD` to use the credential defined on user records within EAM. Set to `LDAP` to use the credential defined in the LDAP provider configured for the EAM deployment. Set to `EXT` to use an external authentication service configured for the EAM deployment.	No
LGNDBR	`STD`	This code stores the login authentication method used for Databridge users. Set to `STD` to use the credential defined on user records within EAM. Set to `LDAP` to use the credential defined in the LDAP provider configured for the EAM deployment. Set to `EXT` to use an external authentication service configured for the EAM deployment.	No
LGNEAM	`STD`	This code stores the login authentication method used for EAM web users. Set to `STD` to use the credential defined on user records within EAM. Set to `LDAP` to use the credential defined in the LDAP provider configured for	No

Code	Example	Description	Fixed
		the EAM deployment. Set to EXT to use an external authentication service configured for the EAM deployment.	
LGNMOB	STD	This code stores the login authentication method used for EAM Mobile users. Set to STDto use the credential defined on user records within EAM. Set to LDAP to use the credential defined in the LDAP provider configured for the EAM deployment. Set to EXT to use an external authentication service configured for the EAM deployment.	No
LOCALE	NAMERICA	This code identifies the number format to use based on the geographic location of your organization/enterprise. The setting for this code specifies that Infor EAM use the geographic standard for the specified locale regarding the use of decimals and commas in numeric data for all numeric fields. Valid values are NAMERICA, EUROPE, and ASIUse the credential defined on user records within EAM.A.	No
MOBDOCUL	DATETIME	Specify a suffix that will be appended to the document file name when uploaded from the mobile device to the Infor EAM server. This is done to better ensure uniqueness and help	No

Code	Example	Description	Fixed
		prevent files from being overwritten on subsequent uploads. Valid values are acceptable using comma separation. Default is DATE TIME.	
MOBORG	NO	This code indicates the Infor EAM Mobile organization downloading mode. Set MOBORG to YES for multiple organization mode, or NO for single organization mode.	No
MULTIORG	YES	This code indicates whether Multi-organization Security (MOS) is activated. You cannot turn off MOS.	Yes
OMBARFMT	NO	This code indicates whether a code and organization are separated with parentheses in Infor EAM Barcode. Valid values are YES or NO.	No
OURCOMP	Your company	Customer name that appears on reports. Modify this code as necessary.	No
PASSMINL	6	Indicates the minimum number of characters allowed for a system password.	No
PASSMNAN	0	Indicates the minimum number of non-alphanumeric characters required for a password.	No
PASSMNLR	0	Indicates the minimum number of lowercase characters required for a password.	No
PASSMNNB	0	Indicates the minimum number of numerical	No

Code	Example	Description	Fixed
		characters required for a password.	
PASSMNUP	0	Indicates the minimum number of uppercase characters required for a password.	No
PASSSAID	YES	Indicates whether the User ID can be used as their password. Valid values are YES or NO.	No
PASSUPER	YES	Indicates whether system allows mixed case for password verification. If set to YES, the system does not use mixed case in password verification. If set to NO, the system uses mixed case in password verification.	No
PMFSNDEL	30	Indicates the number of days a PM Forecasting session in which forecasting has not been started or a WO Labor Scheduling session in which labor has not been started will be saved. Sessions where forecasting or labor scheduling have begun will be saved until the session is Cancelled or Approved.	No
PRMDSPLY	MULTIPLE	Indicates the number of Infor EAM Mobile prompts displayed. If set to SINGLE, the system displays Infor EAM Mobile Prompt in Single Field mode. If set to MULTIPLE, the system displays Infor EAM Mobile Prompt in Multiple Fields mode.	No

Code	Example	Description	Fixed
PMRVSIGN		This code indicates whether both electronic signature and snapshot are required for PM Revision Control. ES = both electronic signature and snapshot required ER = only snapshot	No
PRODNAME	Infor EAM	Name of the product installed. You can modify this code as necessary.	No
PRODUCTS	D7I	Name of the products used. Values are as follows: EXTSQL—If you are using Infor EAM for SQL Server only EXTORCL—If you are using Infor EAM (Oracle) only D7I—If you are using the Forms interface only BOTH—If you are using both Forms interface and Extended interface	No
QUICKDEF	B	This code sets the default value for the Operator field on the Quick Filter portion of the Search Bar and Dataspies. Set QUICKDEF to B for Begins with and C for Contains. Applies to text fields only.	No
REFRSHLV	YES	Set to YES to designate the system to refresh the data when users return to the List View page from the Record View page or any other tab. Set to NO to designate	No

Code	Example	Description	Fixed
		the system to not refresh the List View page.	
REPBATCH	NO	This code indicates whether to print reports on the server printer (YES) or on the client printer (NO). **1** Note: Infor EAM always treats this parameter as set to NO.	No
REPSERV	rep78	The name of the default Oracle report server. Do not use underscores (_) or numbers in the name.	No
REPSTOL	10	The amount of time in minutes a report is kept in cache for reuse.	No
RMTMOUT	20	Time out setting for Infor EAM Mobile Real-time web service request, (in seconds).	No
SAFEWARN	NO	Equipment safety warning for Infor EAM Mobile. Refer to Infor EAM Mobile documentation.	No
SCNCACHL	OFF	Controls whether a screen with caching Enabled will open to the List View or to the last tab selected prior to leaving the screen. Set to ON to return to the List View. Set to OFF to return to the last tab selected.	No
SDATE	NO	This code determines the transaction date Infor EAM uses for recording/approving a physical inventory in the R5TRANSACTIONS table and the R5TRANSLINES table.	Yes

Code	Example	Description	Fixed
		For example, if you start your count on Monday and finish it on Wednesday, this parameter determines which date is recorded. If YES, the system records the start date. If NO, Infor EAM uses the date the count is approved.	
SECUPWEP	30	Number of days in the password expiration period. You can change this value.	No
SECUPWRP	180	Number of days before a user can reuse an expired password. You can change this value.	No
SECUVIOL	5	Number of consecutive password violations that can occur before a user is locked out of Infor EAM. You can change this value. The system administrator can also unlock the user.	No
SESINTVL	15	Must be set to support multiple application servers. The value specified for this parameter represents a number in minutes. If a session remains inactive for the number of minutes specified for this install parameter, the system will kill the session. **1** Notes: The system actually doubles the value specified for this parameter setting to create a buffer to	No

Code	Example	Description	Fixed
		ensure that a valid session is not killed. **2** Also, if a value of less than `5` is specified, the system assumes a value of `5` minutes as the setting for the parameter.	
SHOWQURY	NO	This code indicates whether to show the query fields on grids by default. Set SHOWQURY to YES to show the query fields on grids by default, or set to NO to hide the query fields on grids by default.	No
SPECJS	NO	Set SPECJS to YES to use the tenant specified language js file. Set SPECJS to NO to use the common language js file.	Yes
STYLECD	default	Identifies the custom web style sheet and associated images.	No
TABSAVE	INSERT	Set TABSAVE to IN SERT to return to Insert Mode after modifying a record on List/Detail tabs. Set TABSAVE to UPDATE to stay in Update Mode after modifying a record.	No
TRANDESC	Transaction	Transaction description. Changing the value does not affect existing data.	No
UCOLANG	EN	Language code of default user code. Do not change this setting once in use.	Yes

Code	Example	Description	Fixed
UPLNXS		This code identifies a separate index tablespace for all conversion data uploaded.	No
UPLTBS		This code identifies a separate data tablespace for all conversion data uploaded.	No
WOBARFMT	NO	This code indicates whether work order barcodes are printed in WO#ACT format. Valid values are YES or NO.	No
WSGRIDSZ	10000	This code indicates the maximum number of rows returned per block for web service grid.	No

Infor EAM Parameters

Infor EAM parameters are related only to Infor EAM and do not affect Infor EAM (Oracle Forms).

Set values for Infor EAM parameters according to the following table. For more information on setting values for parameters, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
ANALOG	INFO	Analytics logging level. Valid values are: ERROR, WARN, INFO, or DEBUG.	No
ANALOGKP	7	Number of days to keep Analytics server log records.	No
ANASYNKP	180	Number of days to keep Analytics synchroniza-tion records.	No
AUTOSAVE	YES	This code indicates whether to save work automatically when moving from tab to tab in Infor EAM. Valid values are YES and NO. If set to NO, then Infor EAM displays a message prompting the user to save their work when moving from tab to tab.	No
CANCSTAT	CANC	This code indicates the status used by Infor EAM when a work order is cancelled. You can choose from any equivalent user statuses.	No
DBBUFSIZ	500	Cache size for grid query results	No
DWLABOR	ON	Indicates whether the data warehouse ETL driver will populate the Booked Labor hours and Available Labor data mart. Valid values are ON and OFF.	No
DWMATL	ON	Indicates whether the data warehouse ETL driver will populate the Daily Material transac-tions data mart. Valid values are ON and OFF.	No
	ON	Indicates whether the	No

Code	Example	Description	Fixed
DWORDERS		data warehouse ETL driver will populate the Purchase orders and order lines data mart. Valid values are ON and OFF.	
DWPARTS	ON	Indicates whether the data warehouse ETL driver will populate the Parts and Stores daily values data mart. Valid values are ON and OFF.	No
DWSTATUS	ON	Indicates whether the data warehouse ETL driver will populate the Daily Status Changes data mart. Valid values are ON and OFF.	No
DWWARNTY	ON	Indicates whether the data warehouse ETL driver will populate the Warranty claims accumulating values data mart. Valid values are ON and OFF.	No
DWWORK	ON	Indicates whether the data warehouse ETL driver will populate the Work orders accumulating and daily values data mart. Valid values are ON and OFF.	No
EQUIPSTR	C	Define which fields will display in equipment structure. Valid values are B, C, or D. Enter B to display both the code and description. Enter C to display only the code. Enter D to display only the description.	No
REJSTAT	REJ	This code indicates the status used by Infor EAM when a work request is rejected. You can choose from any equivalent user statuses.	No

Code	Example	Description	Fixed
REPCLEAN	240	Specifies how long in minutes that report temporary data will remain.	No
REPORTMX	100	The maximum number of records that can be returned to the work order, requisition, and purchase order reports in Infor EAM without causing an error.	No
REPPURGE	1440	This code indicates the amount of time (in minutes) to keep an Infor EAM report output file on the server before deleting it.	No
RTIMEOUT	120	This code indicates the amount of time (in seconds) to wait for a report to finish executing before sending it to the report queue.	No
SHOWLOT	Y	Determines whether lots are used for stock information for parts in Infor EAM. The default setting for SHOWLOT is Y. If SHOWLOT is set to N, Extended disables the Lot field and it is hidden on forms.	No
SRQREP	5	This code indicates the number of days to search for similar requests. Infor EAM flags similar services requests that are repeated.	No
WHSLEEP	24	This code indicates the time increment (in hours) between each data warehouse ETL procedure update. The default value is 24.	No
WHSTART	2:00	This code indicates the specific time at which to run the data warehouse	No

Code	Example	Description	Fixed
		ETL update (based on the server time). Enter in the format HH:MM, where HH is `24` hour time, MM is minutes. The default value is `2:00` (2AM).	
`WSLSUPP`		Contains a comma separated list of supported Language strings that are encrypted.	No
`WTIMEOUT`	`15`	The value specified for this parameter indicates the length of time (in minutes) that the client can remain idle/inactive before the server terminates the user's session for both Infor EAM (Oracle Forms) and Infor EAM. After the server terminates the session in Infor EAM (Oracle Forms), the system displays a message indicating that the user's session is being terminated. After acknowledging the message, the server shuts down the Infor EAM application. After the server terminates the session in Infor EAM, the form on which the user was working is still displayed. However, when the user tries again to use the system, the system displays a message and returns to the login screen.	No

GIS Parameters

GIS functionality is a feature of Infor EAM only. All of the parameters listed in this section are used only by Infor EAM for GIS Integration. You cannot integrate GIS with Infor EAM (Oracle Forms).

Set values for GIS parameters according to the following table. For more information on setting values for parameters, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
GISABLC	3	This code identifies the maximum number of advanced buffer layers allowed. The default is 3.	No
GISADDR	Streets	Name of the Address Layer in the Image Service setup in the GISSERV install parameter.	No
GISAIMSP	SHAPEFILE	This code indicates the ArcIMS platform. Acceptable values are SHAPE FILE and SDE.	No
GISAIMSV	9.0	This code indicates the ArcIMS version. Acceptable values are 4.01 and 9.0.	No
GISCCCOL		This code indicates the name of the City or Zone Column in the attributes of the City or Zone Layer. This parameter is used when a user searches by specifying the City or Zone name only.	No
GISCITY		This code indicates the name of the City or Zone Layer in the Image Service setup as the GIS SERV install parameter. This parameter is used when a user searches by specifying the Zone name only.	No
GISCONTP	TCP	Type of GIS connection. This code indicates the connection type between the Infor EAM application server and the ArcIMS server. Valid values are TCP, HTTP, or HTTPS. If no value is specified, a TCP connection is assumed.	No

Code	Example	Description	Fixed
GISCTCOL		This code indicates the name of the Zone Column in Attributes of the Address Layer.	No
GISDREL	L	Indicates the manner in which the system should display boundary labels for linear equipment (referred to as "routes" in GIS). Valid values are L, N, and A. The default is L. If set to L, the system displays boundary labels for the longest path (in the event of multiple route paths). If set to N, the system displays no boundary labels. If set to A, the system displays boundary labels for all paths (in the event of multiple route paths).	No
GISEQUIP	Hydrant	Default equipment layer name. This code indicates the name of the Asset Layer in the Image Service setup in the GIS SERV install parameter.	No
GISGEOSV	WATER_AXL2, WATER_AXL3	This code indicates the name of the secondary Image Service setup on the ArcIMS server. Refer to the explanation of the GISSERV parameter later in this section for the default Image Service setup. Separate values with a comma to enter multiple geocode services, e.g., Service2, Service3, Service4.	No
GISGMAXC	100	This code indicates the maximum number of geocoding match candidates. The default is 100.	No
	20,0,100	This code indicates the	No

Code	Example	Description	Fixed
GISGMIN		minimum geocoding score that the system should display in the Matching Addressess popup. The default is 20. Separate multiple geocoding score values with a comma. The first value listed is the score for GISSERV and subsequent entries are values for each GIS GEOSV.	
GISHOST	gisone	GIS server name. This code indicates the host name (and domain if required) of the machine running arcIMS. The URL must be accessible from the Infor EAM server. Do not include http:// in the URL.	No
GISINTRS	& | @	Intersection address searching symbols (default & | @). Values should be separated by a space.	No
GISLNCOL	0,255,197	GIS line RGB color (default 0,255,197). This code indicates the color used for lines in the GIS map by entering an RGB color of 0 to 255.	No
GISLNWID	4	Specify the width of high-lighted lines in the GIS map, or enter LAYERDE FINED. **Note:** For more information about the LAYERDE FINED value, refer to Customizing Map Symbols Chapter 10 GIS Integration of the User's Guide.	No
GISMAPS	Global	Set to Global to display a single map in Infor EAM based on GIS installation	No

Code	Example	Description	Fixed
		parameters. Set to `Organization` to display maps based on Organization. Set to `Department` to display maps based on Department. Department Security must be enabled when set to Department.	
GISNARAD	1500	Specify the radius, in meters, used for viewing nearest address. The default value is `1500`.	No
GISMLCOL	255,55,155	GIS markup line RGB color (default `255,55,155`)	No
GISMLWID	4	GIS markup line width (default `4`)	No
GISMPCOL	255,55,155	GIS markup point RGB color (default `255,55,155`)	No
GISMPTYP	CROSS	Specify the type of the markup point. Acceptable values are `CIRCLE`, `STAR`,`CROSS`, `SQUARE`, `TRIANGLE`, or `RASTER MARKER`. **Note:** For more information about the `RASTER MARKER` value, refer to Customizing Map Symbols.	No
GISMPWID	15	GIS markup point width (default `15`)	No
GISOVSV	WATER_AXL_OV	Specify the image displayed within the overview map. The default is the default extent of the current map.	No
GISOVSZ	25	Specify the size of the overview map. The number you enter represents a percentage of the width	No

Code	Example	Description	Fixed
		of the current map. The default is `25`.	
`GISPLYBC`	`255,0,0`	GIS polygon boundary RGB color (default `255,0,0`). This code indicates the color used for the boundary of highlighted polygons in the GIS map by entering an RGB color of `0` to `255`.	No
`GISPLYCL`	`0,255,197`	GIS polygon fill RGB color (default `0,255,197`). This code indicates the fill color used for highlighted polygons in the GIS map by entering an RGB color of `0` to `255`.	No
`GISPLYFT`	`CROSS`	GIS polygon fill type. This code indicates the fill type of highlighted polygons in the GIS map. Valid values are `HORIZONTAL`, `, BDIAGONAL`, `CROSS`, `DIAGCROSS`, `FDIAGONAL`, or `VERTICAL`.	No
`GISPLYTR`	`1`	GIS polygon fill transparency (default `1.0`). This code indicates the transparency level of the color fill of highlighted polygons in the GIS map.	No
`GISPORT`	`5300`	GIS server port. This code indicates the port number on which the ArcIMS service mentioned in the `GISSERV` install parameter is accessed.	No
`GISPTCOL`	`0,255,197`	GIS point RGB color (default `0,255,197`). This code indicates the color used for points in the GIS map by entering an RGB color of `0` to `255`.	No
`GISPTTYP`	`CIRCLE`	This code indicates the point type in the GIS map. Valid values are `STAR`,	No

Code	Example	Description	Fixed
		CIRCLE, CROSS, SQUARE, TRIANGLE, RASTERMARKER, or LAYERDEFINED. **Note:** For more information about the RASTER MARKER and LAYERDE FINED values, refer to Customizing Map Symbols.	
GISPTWID	15	GIS point width (default 15). This code indicates the width of the point used in the GIS map.	No
GISSERV	WATER_AXL1	This code indicates the name of the primary Image Service setup on the ArcIMS server.	No
GISSFCLR	248,138,29	This code indicates the selected feature highlight color (default 248,138,29).	No
GISSTCOL		This code indicates the name of the Street Column in Attributes of the Address Layer that is used for non-geocoded address searches.	No
GISSVAXL		GIS map file for service identified by GISSERV. Used for viewing nearest address, e.g., reverse geocoding. **Note:** GISSVAXL supports HTTP, fully qualified file paths, and UNC file paths. The system requires this to load the XML of the AXL and retrieve the geocoding definitions. Such information is not available via ArcXML responses.	No

Code	Example	Description	Fixed
GISTFNTC	`0,0,0`	Specify the RGB font color of the text marker label. Default values are `0,0,0`.	No
GISTFNTS	`BOLD`	This code indicates the font style of the text marker. Valid values are `BOLD`, `BOLDITALIC`, `ITALIC`, `REGULAR`, `OUTLINE`, or `UNDERLINE`.	No
GISTFNTZ	`10`	This code indicates the font size of the text marker label. The default value is `10`.	No
GISTFONT	`Arial`	This code indicates the font of the text marker label. The default value is `Arial`.	No
GISTGCLR	`255,255,125`	This code indicates the RGB color with which to highlight the text marker label. Default values are `255,255,125`.	No
GISTLPCL	`0,0,0`	This code indicates the RGB point color of the text label. Default values are `0,0,0`.	No
GISTLPTP	`CIRCLE`	This code indicates the point type of the text label. Valid values are `CIRCLE` (default), `STAR`, `CROSS`, `SQUARE`, `TRIANGLE`, or `RASTERMARKER`. **Note:** For more information about the `RASTER MARKER` value, refer to Customizing Map Symbols.	No
GISTLPWD	`15`	This code indicates the width of the point used in the text label.	No
GISTOCLR	`255,255,0`	This code indicates the RGB color with which to outline the text marker la-	No

Code	Example	Description	Fixed
		bel. Default values are `255,255,0`.	
`GISTPRMD`	`ALLUPPER`	This code indicates the print mode for the text marker. Valid values are `ALLUPPER`, `ALLLOWER`, `NONE`, or `TITLECAPS`.	No
`GISZOFCT`	`2`	This code indicates the default percentage factor by which the map search result will be enlarged. The default value is `2`.	No
`URLGIS`	`http://shotgunde mo. inforEAM.net/ attachments/gis wo/default/`	GIS map PDF directory. This value is used when displaying and printing map attachments of the work order.	No

Materials Parameters

Materials parameters are related to assets, inventory, and pricing features that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly.

Set values for materials parameters according to the following table. For more information on setting parameter values, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
`ASSETASS`	`P`	This code indicates whether to associate an asset with parts tracked by asset during receipts (`R`) or during creation of a purchase order (`P`).	No
`AUTOPART`	`AUTO`	This code determines whether the system automatically updates the Parts Associated list. Update the Parts Associated list for approved lines on a receipt. If `AUTOPART` is set to `AUTO`, the system verifies whether the received	No

Code	Example	Description	Fixed
		part is associated with an equipment's Parts Associated list when a purchase order receipt is approved for a work order. If the received part is not associated with the equipment's Parts Associated list, the system adds the part to the list using the quantity of the transaction as the Parts Associated quantity.	
		If the part is already associated on the Parts Associated list, then the system updates the quantity of the part on the Parts Associated list to the transaction quantity if the transaction quantity is greater than the existing quantity on the Parts Associated list. If the transaction quantity is not greater, then the system does not make any updates. Also applies to issues, not just receipts.	
AUTOPNUM	NO	This code indicates whether Infor EAM automatically generates part numbers.	No
AUTOSTOK	Yes	This code indicates whether Infor EAM automatically creates records in tables R5STOCK and R5INSTOCK (+) for data collection.	No
DEFSTOCK	YES	This code indicates whether the stock management fields (e.g., re-	No

Code	Example	Description	Fixed
		order level, min/max, order level, etc.) should be copied from the highest-level parent store to the child store when a stock record is created in the child store.	
DEFRQTP	PS	Determines the default line type for requisitions. Specify a user status equivalent to the system status of PS (Stock Parts), PD (Direct Purchase), or RE (External Repair) for the PLTP entity. The system automatically defaults the line type to the specified user status. If DEFRQTP is null or if you enter an invalid value, the system automatically defaults the line type of requisitions to the system status of PS.	No
DEFUOM	EA	Base unit of measure for transactions, such as store issues and returns. Changing this default will not affect existing data. However, Infor **strongly recommends** using EA (Each) or PEC (Piece, e.g., individual part) as the base unit of measure because of the part-by-asset mechanism.	No
DELTMATL	Y	Delete materials list. Valid values are Y and N. Y implies that Infor EAM will remove the temporary material lists upon completion of the related work order. Y al-	No

Code	Example	Description	Fixed
		so indicates that after completion, the estimated material costs will no longer include data from the temporary material lists. N implies that Infor EAM will not remove the temporary material lists.	
LOTNRG	P	Lot number generation. This code indicates how Infor EAM should generate lot numbers. Valid values are T (each receipt), P (only parts that are tracked by lot), or - (no lot numbers; lot number * is always used). It is possible to change this parameter in a live installation; however,Infor **strongly recommends** determining a lot-numbering policy before entering data. Changing the value does not affect existing data.	No
OBSTCASC	A	This code indicates whether parent equipment status changes of I (Installed) or D (Withdrawn) will be cascaded to the child equipment. If set to A the system will cascade parent equipment status changes to all children. If set to D the system will only cascade parent equipment status changes to dependent children.	No
OVERRECV	YES	Indicates whether you can receive more parts than the number of parts originally ordered. If set to YES, you can receive more parts than the	No

Code	Example	Description	Fixed
		number ordered. If set to NO, you cannot receive more parts than the number originally ordered.	
PDRCPTTO	STORE	This code indicates whether Infor EAM receives direct on-dock materials directly to stores or against a work order.	No
PICKONCE	YES	This code indicates whether Infor EAM can issue multiple work orders against the same pick list. For example, if this parameter is set to YES and you have a pick list associated with a work order and the pick list includes four items for which you only issue one item for the pick list, you can no longer issue items against that pick list again. If the parameter is set to NO, you can still issue against the remaining three items on the pick list.	No
PLNDRQPO	OFF	This code indicates whether requisitions and unapproved purchase order totals are included in cost summaries for project reports. If the value is ON, then Infor EAM includes the cost of requisitions or unapproved purchase orders in the calculation of the total displayed in Planned throughout Infor	No

Code	Example	Description	Fixed
		EAM, as well as estimated work order costs that are not yet linked to a requisition or purchase order.	
		If the value is `OFF`, Infor EAM does not include the cost of requisitions or unapproved purchase orders in the calculation of the total displayed in Planned throughout Infor EAM. The value for Planned is calculated based only on estimated work order costs.	
		Purchase orders with Approved status are displayed in On Order throughout Infor EAM until they are Received. However, after purchase orders are received, the purchase order costs are displayed as Actual and used in the calculation of Estimate to Complete.	
		Infor EAM calculates Estimate to Complete for project costs based on the following formula:	
		Current Estimate to Complete – (Planned + Actual)	
POSTALLR	A	Auto status for the DOST entity for full PO receipts. Specify a user status equivalent to the system status A (Approved) for the DOST entity, and the system automatically changes the purchase order status to the specified value	No

Code	Example	Description	Fixed
		when all the lines on the purchase order are fully received or cancelled.	
		If the purchase order header status is already set to the status defined in this parameter, then the system does not modify the purchase order status.	
		Note: If you have set the `POSTALLR` parameter, then the processing rules associated with the `POSTALLR` parameter overrides the rules for the `POSTRECV` parameter.	
`POSTRECV`	`A`	Auto status for the `DOST` entity for PO receipts. Specify a user status equivalent to the system status `A` (Approved) for the `DOST` entity, and the system automatically changes the purchase order status to the specified value when one or more lines on the purchase order are partially received. When a `RECV` transaction is approved for a part associated to a purchase order, the system updates the purchase order header status to the specified status. If the purchase order header status is already set to the status defined in this parameter, then the system does not	No

Code	Example	Description	Fixed
		modify the purchase order status. **Note:** If you have set the POSTALLR parameter, then the processing rules associated with the POSTALLR parameter override the rules for the POSTRECV parameter.	
PRICELEV	P	Price level. This code indicates whether prices must be kept at part level (same part prices for all stores) or at store level (part can have different prices in different stores). Valid values are P and S. You cannot change this setting once in use.	Yes
PRICETIM	R	Pricing updates. This code determines when Infor EAM updates average unit price and last purchase price. Valid values are I (calculate new price at invoice approval) or R (calculate new price at receiving approval on basis of PO prices.) Inconsistencies in data will occur if you change this value. After a change, some prices will still be based on the old mechanism while others will be based on the new mechanism. Over time (usually the amount of time required for a complete inventory turnover), a shift will take	No

Code	Example	Description	Fixed
		place from the old mechanism to the new.	
		If the price type of a stock record in the R5STOCK table is LIFO or FIFO, Infor EAM calculates pricing updates when you approve a receipt regardless of the setting of this parameter. However, if the setting of this parameter is I, Infor EAM calculates pricing updates again when you approve an invoice and/or credit/debit note.	
		Infor *strongly discourages* changing this setting.	
PRICETYP	A	Price type. This code determines the default value for Price Type when creating stores and indicates the manner in which Infor EAM prices storeroom materials at the store level. Valid values are A for Average price, FIFO for First in first out, L for Last price, LIFO for Last in first out, and S for Standard price.	No
		LIFO or FIFO pricing is a time-based pricing method; therefore, you should only set PRICETYP to FIFO or LIFO on the store record if you have selected to keep prices at store level. (Refer to PRICELEV earlier in this section.)	

Code	Example	Description	Fixed
		Infor EAM strongly discourages changing the price type because inconsistencies in data may occur. (Refer to `PRICE TIM` earlier in this section.)	
`PROJTRCK`	`ON`	Budget tracking for projects. This code indicates whether Cost Area, Cost Center, and Code of Accounts are displayed and enabled on the Budgets tab of the Project form. Cost Area, Cost Center, and Code of Accounts enable you to track project costs and budgets more precisely by associating cost areas, cost centers, and codes of accounts with budget codes, as well as enabling project and financial managers to access more detailed information about project budgets on project reports.	No
		Cost Area , Cost Center , and Code of Accounts are linked to the `PRCA` (Cost areas), `PRCC` (Cost codes), and `PCOA` (Code of accounts) entities. You can define cost areas, cost codes, and codes of accounts as user codes as necessary based on your project budget tracking preferences on the System Codes form. Refer to "Defining System Codes" on page 12.	

Code	Example	Description	Fixed
RECVAUTO	YES	This code indicates whether the system should automatically populate the quantity to receive on purchase order receipts. If RECVAUTO is set to YES, the system automatically populates the Receipt Qty. (UOM) on the Active Lines page of the PO Receipts form with the outstanding quantity for each line on a purchase order receipt. If RECVAUTO is set to NO, a value must be manually entered for the receipt quantity for each line on the receipt.	No
REQDESC	Requisition	Default requisition description. Changing this value does not affect existing data.	No
RPPRCCAL	NO	This code indicates whether price calculations should be performed when receiving internally repaired spare parts.	No
RQSTALLR	A	Auto-status for the RQST entity for full PO receipts. Specify a user status equivalent to the system status A (Approved), and the system automatically changes the requisition status to the specified value when all lines are fully received or cancelled for a PO receipt. When a RECV transaction is approved for a part associated to a pur-	No

Code	Example	Description	Fixed
		chase requisition via a purchase order (the system does not consider receipts for store to store requisitions) and all of the requisition lines on the requisition are fully received or cancelled, then the system updates the requisition header status to the specified status.	
		If the requisition header status is already set to the value defined by this parameter, then the system does not modify the status. Likewise, if all the lines on a requisition are cancelled and none of the lines have been received, then the system does not consider the setting of this parameter.	
RQSTRECV	A	Auto-status for the RQST entity for PO receipts. Specify a user status equivalent to the system status A (Approved), and the system automatically changes the requisition status to the specified value when one ore more lines are partially received for a PO receipt.	No
		When a RECV transaction is approved for a part associated to a purchase requisition via a purchase order (the system does not consider receipts for store to store requisitions), then the	

Code	Example	Description	Fixed
		system updates the requisition header status to the specified status.	
		If the requisition header status is already set to the value defined by this parameter, then the system does not modify the status. Likewise, if all the lines on a requisition are cancelled and none of the lines have been received, then the system does not consider the setting of this parameter.	
RRISSWAR	YES	This code indicates whether Infor EAM should generate a warning message to check whether you need to create a work order for a spare that has failed when you issue a repairable spare part on the Issue/Return Parts issues form.	No
RTNANY	Yes	The RTNANY parameter indicates whether you can return a greater quantity of a part than the original issue quantity of the part, and/or whether or not the system allows you to return a part to a different store than the store from which it was issued.	No
		If RTNANY is set to YES, you return any quantity of any parts to any store for which there is a part record on the Stores tab of the Parts form (the system only requires	

Code	Example	Description	Fixed
		that a part record exists for the part in the store, not that a bin-stock record exists for the part in the store).	
		If RTNANY is set to NO, you cannot return a greater quantity of a part than the original issue quantity. The system only allows you to return the quantity of the part that was originally issued to that entity to the same store, bin, and lot.	
		When issuing a part, you issue to an entity (work order, equipment, etc.) from a store. When returning a part, you return from an entity (work order, equipment, etc.) to a store.	
		For example, if RTNANY is set to NO and if you issue 20 parts to a work order for a piece of equipment on the work order, you can only return those parts from the work order. You cannot return the part directly from the equipment. The RTNANY parameter indicates whether you can return a greater quantity of a part than the original issue quantity of the part.	
		If RTNANY is set to YES, you can return a greater quantity of a part than the original issue quantity. If RTNANY is set to NO, you cannot return a	

Code	Example	Description	Fixed
		greater quantity of a part than the original issue quantity.	
SHOWQTY	NO	This code indicates whether to show the expected quantity for Infor EAM Mobile physical inventory.	No
STTKDISC	2	Physical inventory discrepancies. This code indicates how Infor EAM handles physical inventory discrepancies for parts tracked by asset when signing off physical inventories on the Physical Inventory form. Valid values are 1, 2, or 3, with 2 being the default value. You can change this value. If the value is 1, Infor EAM ignores physical inventory discrepancies for parts tracked by asset. If the value is 2, Infor EAM ignores physical inventory discrepancies for parts tracked by asset, but prints the discrepancies on the sign-off document. If the value is 3, Infor EAM disables signing off stocktakes for parts tracked by asset.	No

Miscellaneous Parameters

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

Set values for miscellaneous parameters according to the following table. For more information on setting parameter values, refer to "Defining Installation Parameters" on page 11.

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

Purchasing Parameters

Purchasing parameters are related to purchasing and requisitions that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly.

Set values for purchasing parameters according to the following table. For more information on setting parameter values, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
DEFPOTP	PS	Determines the default line type for purchase orders. Specify a user status equivalent to the system status of PS (Stock Parts) or PD (Direct Purchase) for the PLTP entity. The system automatically defaults the line type of purchase orders to the specified user status. If DEFPOTP is null or if you enter an invalid value, the system automatically defaults the line type of purchase orders to the system status of PS.	No
EXRTUPDT	NO	Manual exchange rate update. Setting this parameter to YES will enable users to manually enter exchange rate fields.	No
EXTCHG	M	Include adjusted charges in the base price. This code indicates whether Infor EAM automatically includes adjusted charges, such as a discount or an additional charge, when entering information on the Extra charges/Discounts dialog box. If the value is Y, Infor EAM automatically selects Include for all the items on the Extra charges/Discounts dialog box and does not allow you to unselect it. If the value is N, Infor EAM automatically unselects Include for all the items	No

Code	Example	Description	Fixed
		on the Extra charges/Discounts dialog box and does not allow you to select it. If the value is M, Infor EAM automatically unselects Include for all the items on the Extra charges/Discounts dialog box and enables you to select or unselect it as necessary.	
INCREDIT	O	Updates part price for stock for credit and debit notes. This code indicates how Infor EAM handles updating part prices for approved credit and debit notes. Valid values are O (Off), P (Partial), or F (Full), with O being the default value. You can change this value.	Yes
		If the Value is O, Infor EAM does not update part prices upon approval of a credit or debit note.	
		If the Value is P, Infor EAM applies the credit amount in the calculation of Average Price for a part upon approval of a credit note. When the credit amount is greater than the value of the part in stock, Infor EAM applies a portion of the value of the credit amount, up to the value of the part in stock, in the calculation of the average price. By setting the value to P, the calculation of the average price might result in an aver-	

Code	Example	Description	Fixed
		age price of 0 for a part, but it also ensures that the average price cannot be less than 0. The remaining value of the credit amount that is not used in the calculation of the average price is stored as a Credit Balance for the part in stock.	
		If you are using LIFO/FIFO as your pricing method, Infor EAM applies credit amounts similarly to the manner it does if the setting is `P` regardless of the setting you specify for this parameter; however, Infor EAM stores the unused credit amount in the `IVL_LOSTCREDIT` column of the `R5IN VOICELINES` table, rather than storing the credit amount as a Credit Balance for the part in stock.	
		If the value is `F`, Infor EAM applies the credit amount in the calculation of Average Price for a part upon approval of a credit note when the credit amount is less than the value of the part in stock. Setting the value to `F` ensures that the calculation of the average price for a part can never result in a value of 0.	
`INVADAYS`	60	This code indicates the number of days after	No

Code	Example	Description	Fixed
		completion that invoice allocations can be applied to a work order.	
INVALLOC	NO	Set INVALLOC to YES to track unallocated invoice differences. Set INVALLOC to NO to apply all invoice differences to the stock record.	No
INVDESC	Invoice	Invoice description. Changing the value does not affect existing data.	No
INVMETH	–	This code indicates the default inventory replenishment method to use for maintaining stock levels. Valid values are (M) for Min/Max, (–) for Reorder level, or (+) for On demand. The default setting for this parameter is Reorder level.	No
INVUPCAT	NO	This code indicates whether the supplier's catalog will be updated upon approval of an invoice.	No
LIMITLEV	L	Limit level. This code indicates if Infor EAM should check the value for orders/requisitions on the header level (H) or line level (L). Changing the value does not affect existing data.	No
MATCHAPP	NO	Automatic approval of matched invoices. This code indicates whether Infor EAM automatically approves invoices for which the cost of all invoice lines has been matched with the cost of the purchase order lines associated with the invoice lines within range	No

Code	Example	Description	Fixed
		of tolerance specified for Match Tolerance Absolute or Match Tolerance % on the Organization form. If the value is set to YES Infor EAM automatically assigns A—Approved status for invoices for which all invoice lines have been matched with associated purchase order lines within the specified range of tolerance. If the value is NO, then all invoices must be manually approved.	
MATCHTOL	0	Match tolerance. This code indicates the tolerated difference (in percentage) between the sum of the invoice lines and the amount specified on the invoice header. Valid values are any non-negative numbers. Changing the value does not affect existing data. **Note:** The MATCHTOL installation parameter is no longer active for Infor EAM (Oracle Forms) or Infor EAM, because users no longer enter a voucher total. Instead, the voucher total is now calculated based on the total invoice costs.	No
POCURR	YES	This code indicates whether Infor EAM allows multi-currency order lines.	No
PORDDESC	Order	Purchase order description. Changing the value does not affect existing data.	No

Code	Example	Description	Fixed
RCPTCURR	PO	This code indicates which exchange rate Infor EAM uses for receipt or return of goods. PO= exchange rate of purchase order; RCPT= the active exchange at time of receipt/return transaction approval.	No

URL Parameters

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

Set values for URL parameters according to the following table. For more information on setting parameter values, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
ADRDOCUP	`http://`	Document upload path for Infor EAM Advanced Reporting. The value specified identifies the path from the advanced report server to the document upload directory. Must be a valid URL and can be either `http://` or file `://` `protocol`. The path is necessary to add attachments of type "U" (upload) to the Work Order and Purchase Order reports.	No
DISCSCH	`myoracleuser/ my password@ my database`	The schema connect string for Discoverer	No
DISCVURL	`http://myserv er.mycompa ny.com/discover er/viewer`	The URL of the Discoverer viewer	No
ONLMAN	`http://myserv er.mycompany.com`	Contains the full path to the online help	No
OPIMGURL		This install parameter is the absolute URL of the directory where the OPS setup stores the images.	No
RPTDOCUP	`http://mycompany. myserver.com/docu ments/PDFS`	Document upload path for Crystal Clear Reporting. The value specified identifies the path from the Crystal Clear Report Server to the document upload directory. Must be a valid URL and can be either an http:// or file:// protocol.	No
SMTPSEND	`mailid@yourcompa ny.com`	Name of the mail sender, which is used in replying to messages	No
	`mail.yourcompa`	SMTP mail server	No

Code	Example	Description	Fixed
SMTPSERV	ny.com		
WDCUPURL	http://myserver.mycompany.com/servlet/WscanUpload	The URL of the web data collection upload file servlet.	No

Work Parameters

Work parameters are related to work orders, budgets, and project management features that must be set for Infor EAM (Oracle Forms) and Infor EAM to work properly.

Set values for work parameters according to the following table. For more information on setting parameter values, refer to "Defining Installation Parameters" on page 11.

Code	Example	Description	Fixed
7ISCDKEY		Infor EAM Caller Login for Service Requests CD key	No
AUTODMEC	Y	This code determines whether the Remove Equipment hyperlink on the Equipment page of the Work Orders form breaks the association between the parent work order and a multiple equipment child work order or whether the system also deletes the multiple equipment child work order. Valid values are Y or N . By default the parameter is set to Y, which means that the system deletes	

Code	Example	Description	Fixed
		the related multiple equipment child records.	
AUTOPMCL	NO	This code indicates whether to automatically close all released minor PMs at release of the major PMs (YES/NO).	No
BOOKDATE	ON	Indicates whether to enforce date constraints when booking hours. If set to OFF, the system ignores the constraints. If set to ON, the system enforces the constraints. **Note:** Setting this parameter OFF may result in inconsistencies within your booked hours data. Setting BOOKDATE to OFF enables you to book labor hours for a date that is earlier than Date reported. By enabling you to book the hours without any date restrictions based on the Date reported field, you can leave the value for Date reported as is and still book hours for work that has already been completed.	No
BOOPLAN	OFF	Booking hours. Valid values are ON and OFF. When booking hours, if the value is ON, Infor EAM gets the trade rate from the activity on which hours are booked. If the value is OFF, Infor EAM gets the rate from the employee table. Changing this value will not affect existing data.	No

Code	Example	Description	Fixed
		If you change this parameter and open work orders exist on which hours have already been booked, inconsistencies will arise. Close work orders before changing BOOPLAN.	
CALSTD	YES	Determines if calibration standards that have overdue PM work orders can be used to perform a calibration. If CALSTD is set to YES, equipment with overdue PM work orders are available for selection as a calibration standard. If CALSTD is set to NO, equipment with overdue PM work orders are not available for selection as a calibration standard.	No
CASCLOC	NO	Cascade equipment Location changes to PM equipment records. If set to YES cascade changes. If set to NO, do not cascade changes.	No
COMDAYS	14	Number of days during which you can book hours on closed work orders. Infor recommends a minimum value of 1. Changing the value will not affect existing data.	No
COVDUPAC	*	This code indicates whether the system allows multiple active warranties. If set to Yes (+), more than one active warranty on a certain equipment can be specified. If set to No(-), only one active	No

Code	Example	Description	Fixed
		warranty on a certain equipment can be specified.	
COVDURUP	+	This code indicates whether the duration fields are display-only. If set to Yes (+), the duration fields can be entered manually. If set to No (-), the duration fields are display-only.	No
DSCHAVAI	7	Number of days from current date used to calculate labor availability in daily scheduling	No
DUPCHECK	ON	If code is set to ON, Infor EAM checks for duplicate and repeated service requests.	No
EVTCASCD	N	Event cascade. This code indicates whether changing a parent work order's status to Closed or Cancelled causes the status of child work orders to also change.	No
INRVCTRL	NO	This code indicates whether Revision control is activated for inspections.	No
INSWOST	L	This code identifies the status used to create work orders from inspection forms. You can choose user codes equivalent to type R (Released).	No
ISSDAYS	0	Issue days. This code indicates the number of days for which issues can be made after you close a work order. Valid values are any non-negative numbers. Changing the value will not affect existing data.	No

Code	Example	Description	Fixed
JTAUTH	NO	This code indicates whether work order type authorization is activated. Work order type authorization limits which users can update, insert, or delete work orders based on the type of work order.	No
MEROUTWO	C	This code identifies which equipment to copy to route-based PM work orders created by the system for multiple equipment records on the work order. Valid values are C, H, or B. **Note:** If no value is specified for MEROUTWO , then the system will operate as if the parameter is set to C. Set MEROUTWO to C to copy only the route equipment. The system creates an MEC work order for each equipment defined for the route. Set MEROUTWO to H to copy only the equipment on the work order header. The system creates a MEC work order for only the Equipment on the work order	No

Code	Example	Description	Fixed
		header. Set `MEROUTWO` to `B` to copy both the equipment on the work order header and the route equipment. The system creates a MEC work order for each equipment defined for the route and for the Equipment on the work order header.	
`NPRDAYS`	`14`	Nonproductive days. This code indicates the number of days for which you can book past nonproductive hours, which is labor performed without a work order. Note that this parameter may interfere with closed periods data. Changing the value will not affect existing data.	No
`PMNEST`	`YES`	Indicates whether to enable the following PM nesting enhancements. Valid values are `YES` or `NO`. If `YES` is selected: The system adjusts the due date forward for nested, more frequent work orders with a status of Awaiting release or Bypassed whenever a work order is Completed. The system adjusts the due date forward for more frequent PM work	No

Code	Example	Description	Fixed
		orders when attempting to release the work order if it is nested with a Completed less frequent work order.	
		If NO is selected:	
		The system adjusts the due date forward for nested, more frequent work orders with a status of Bypassed whenever a work order is complet-ed.	
		The system changes the status of more frequent PM work orders to Re-leased when attempting to release the work order and it is nested with a Completed less frequent work order.	
PMCRPAST		This code indicates whether Infor EAM can generate new fixed PM work orders with a due date in the past. Valid values are YES and NO. The default setting is NO.	No
		If the value is set to YES, Infor EAM creates the next PM work order with a due date that reflects the calculated work or-der due date and the PM frequency, even if the next due date is in the past. If the value is NO, Infor EAM always cre-ates the PM work order with a future due date.	
PMRVCAPP	NO	PM Revision Control. This code indicates whether you can create a new revision only from	No

Code	Example	Description	Fixed
		an approved revision.	
PMRVCDEP	NO	PM Revision Control. This code indicates whether components of a PM depend on the PM itself.	No
PMRVCRES	YES	PM Revision Control. This code indicates whether users can approve lines only from their own departments.	No
PMRVCTRL	NO	PM Revision Control. This code indicates whether PM Revision Control is activated.	No
PMWODATE	C	This code indicates the starting date used when calculating the next due date of a variable PM work order. Set to C for completion date, PB for calibration Performed By date, or RB for calibration Reviewed By date.	No
PPMSTAT	A	PM Status. This code indicates the status of a PM work order when generated from a PM schedule. Valid values are A for Awaiting Release and R for Released. Changing the value will not affect existing data.	No
PROJWOST	L	This code identifies the status used to create work orders on the Project form.	No
REOPENPM	NO	Reopen PMs. This code indicates whether a PM work order can be reopened.	No
REQDAYS	-999	Number of days after completing a work order that a requisition can be	No

Code	Example	Description	Fixed
		created against it.	
ROUTEEOB	N	Generates multiple equipment child (MEC) work orders for equipment on PM routes. Valid values are Y and N.	No
		If	
		ROUTEEOB	
		is set to Y, Infor EAM releases MEC work orders for each equipment on a PM route when the system releases a parent PM work order of Type Fixed or Variable that contains equipment for which a Route is specified.	
		If	
		ROUTEEOB	
		is set to N, Infor EAM does not create MEC work orders when releasing parent PM work orders.	
		Note: In version 7.9 and earlier versions of the system, the system created RC (route child) work orders when a parent work order was released for an equipment-based PM route. Beginning with version 7.10, the MEC work order has replaced the RC work order.	
RSPCOMP	NO	Indicates whether to display the Qty. Completed on work orders for inter-	No

Code	Example	Description	Fixed
		nally repaired repairable spare parts. If set to NO, the system does not display Qty. Completed. If set to YES, the system displays Qty. Completed and restricts internal repair receipts to completed repairs.	
RTNDAYS	14	Return days. This code indicates the number of days that parts can be returned to the store after the work order has been closed. Valid values are any non-negative numbers. Note that this parameter may interfere with closed periods data. Changing the value will not affect existing data.	No
SCHPAST	NO	Set to `SCHPAST` is set to `YES` to allow scheduling in the past. Set `SCHPAST` to `NO` to prevent scheduling in the past.	No
SCHSTAT		The user status of a work order after you have scheduled an activity. You can select any status.	No
SRCLOSE	NO	This code indicates whether to automatically close an associated service request when a work order is closed. Valid values are `YES` and `NO`.	No
	3	This code identifies the	No

Code	Example	Description	Fixed
TOOLDAYS		number of days to update tool usage costs after completion of a work order.	
UPWOMATL	N	Determines if the work order planned parts list is updated to include direct requisition and PO line parts if they are not already planned. If 'N', the work order planned parts list is not updated. If 'Y', the work order planned parts list will be updated. If 'P', choose if the work order planned parts list gets updated as lines you add to requisitions and POs.	No
VTTAUTH	OFF	Determines whether the system uses vehicle ticket type authorization. Valid values are ON and OFF.	No
WFFTAUTH	YES	Comments code. Infor EAM uses this code to determine who has authority to change comments in the comments grid of the Change comments on work orders for work done (WXDONE) form. If the installation parameter is set to NO, all users can change comments; if the installation parameter is set to YES, only users who can reopen work orders have permission to change comments.	No
WOCLPOUT	NO	This code indicates whether a work order can be closed if purchase requisitions and purchase orders are still outstanding. If set to YES, work orders with	No

Code	Example	Description	Fixed
		outstanding requisitions and purchase orders may be closed. **Note:** This parameter may affect purchase order generation if you allow work orders to be closed for which there are existing open requisitions.	
WOQUAL	ON	Qualification enforcement for work. Valid values are ON and OFF. When scheduling work, if the value is ON, Infor EAM determines whether an employee is eligible to perform work by comparing the qualifications associated with a work order activity with the qualifications associated with employees on the Employees form. Infor EAM enables you to assign any employee with the necessary qualifications/training to perform the work. When scheduling work, if the value is OFF, Infor EAM does not check qualifications for work scheduling, and any authorized users can perform work regardless of any qualifications associated with work order activities.	No
WORKDAY	8	Work day hours. This code indicates the default number of hours in a working day. Infor EAM uses this value on the Activities tab of the	No

Code	Example	Description	Fixed
		Work Orders form to calculate the required number of people when an estimated number of hours and the duration is specified. Changing the value will not affect existing data.	
WORKWOST	L	This code identifies the user status for work orders when updated by the Generate/Release WOs form. The work order must have the system status R.	No

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