Oracle® Utilities Work and Asset Management

Configuration Guide

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Primary Author: TUGBU Documentation

Contributing Author: n/a

Contributor: n/a

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Contents

Overview 35

Configuration Guide 35

1 General System Setup 36

Audit Log 36

Batch Processes 36

Refresh Materialized View(s) 36

Business Rules 37

Asset Navigator Rule 37

Copy/Paste Object IDs Rule 38

Default Directories Rule 38

Default File Locations Rule 39

Do Attachments Query 40

Do Notes Query 40

Drill-down Configuration Rule 41

MDI Window Title Rule 41

E-Mail Configuration Rule 42

Optional Message Presentation Rule 43

PIN Processing Administration Rule 45

Primary Menu Rule 46

Restrict List of Values Rule 46

Spell Check Rule 47

UDFs - Auto Copy Across Modules Rule 48

Unit of Measurement Rule 49

Code Tables 49

Code Table 54: Note Types 49

Code Table 186: Manufacturers 49

Event Queue 50

Clearing Events 50

Processing Retries 50

Functions 50

DISABLE CUSTOM SQL 50

Entity Relationship Viewer 51

GIS Viewer 51

Graph Viewer 51

Issue Uncompiled Objects Msg 51

News Administration 51

Reorder Wizard 51

Installation Parameters 51

AUDIT LOG- Objects beginning with SAUT 51

ENABLE PASSWORD RESET 51

PHONE_NUMBER_FORMAT 51

SPELL CHECK 51

Transaction Logs - Objects beginning with SDBT 51

Database Administration 52

E-Mail Integration 52

Enhanced Security 52

Failed Logon Attempts 52

Managing Log Files 53

Security Certificate 54
Single Sign On 54

Transaction Logs 55

Charts, Metrics, and Reports 56

SAPI 56

Batch Processing 60
Batch Processes 60
Job Manager - sdbp_job_error_log ((job_in, plant_in, sysdate-365); 60
Purge Data - sdbp_purge_data; 60
Run All Batch - sdbp_run_all_batch; 60
Business Rules 61
Batch Job Control Rule 61
Batch Purge Criteria Rule 62
Batch Purge Parameters Rule 63

Batch Process Descriptions 64
Reports 69
S_RPT097 - Job Manager Log Report 69
Installation Parameters 70
BATCH JOB DEBUG MODE 70

Approval Limit Module 71
Fields 71
Approval Title and Description 71
Type 71
Employee Number and Username 71
Alert? 71
Active? 71
Document and Limit 72
Copy Record 72
APPROVAL - COPY RECORD 72
Modules and Activities Requiring an Approval Title 72

Routing List Module 73
Fields 73
Title 73
Description 73
Sequence 73
Mandatory 73
Notify Only 73
Business Rules 73
Approval Routing Rule 73
Batch Processes 74
Clear Event Queue - sdbp_event_queue; 74
Copy Record 74
ROUTELIST - COPY RECORD 74
Process flow: 75

2 Administration Subsystem 76

Business Rules Module 77
Reports 78
S_RPT002 - Business Rule Report 78
Custom Rules 78
Integration Rules 79
Interface Rules 81
Interfaces Rule 81
Interface Parameters Rule 82
Obsolete Rules 82
Advanced Materials Management Option (AMMO) 82
AMMO Sequence Numbering Tables 83

Buyers Module **84**
Fields 84
Stores Reorder 84
Update Approved PO 84
Update Issued PO 84

Code Table and Codes Module **85**
Fields 85
Table Number 85
Description 85
Type 85
Code Length 85
Code 85
Description 86
Link 86
Reports 86
S_RPT015 - Code Table Definition Report 86
S_RPT001 - Code Table Report 86
System Code Tables 86
DBA Code Tables 88
Obsolete Code Tables 89
Advanced Materials Management Option (AMMO) 89

Configuration Guide Module **91**
Code Tables 91
Code Table 560 - 565: Configuration Codes 91

Currency Exchange Rates **91**
Fields 91
Currency 91
Effective Date, Exchange Rate, and Comments 91

Fine Grain Access Module **92**
Fields 92
Sequence No.: FGA ID 92
Owner 92
Table Name 92
Condition 92

FGA Responsibility Module **93**
Views 93
Assigned Users 93

Help Form Module **94**
Customizing the Help Form 94
Field Level Help 95
Troubleshooting 96

Installation Parameters Module **97**
Parameter Descriptions 97
BATCH JOB DEBUG MODE 97
CHART THUMBNAIL GENERATION 97
CHART THUMBNAIL PROCESSING 97
CHART_INVENTORY_VALUATION 97
ENABLE PASSWORD RESET 97
INDEX_INITIAL_EXTENT 98
INDEX_NEXT_EXTENT 98
INDEX_TABLE_SPACE 98
JUMBO_SIZE_INITIAL_EXTENT 98
JUMBO_SIZE_NEXT_EXTENT 98
LARGE_SIZE_INITIAL_EXTENT 98
LARGE_SIZE_NEXT_EXTENT 98
LICENSE OWNER 98
MID_SIZE_INITIAL_EXTENT 98
MID_SIZE_NEXT_EXTENT 98
PHONE_NUMBER_FORMAT 98
PK_INITIAL_EXTENT 98
PK_NEXT_EXTENT 98

PK_TABLESPACE ... 98
PRIMAVERA ... 98
SCHEDULING TOTAL EST HRS DISP ... 98
SIA_TABLEOWNER ... 98
SMALL_SIZE_INITIAL_EXTENT ... 99
SMALL_SIZE_NEXT_EXTENT ... 99
SPELL CHECK ... 99
SUPER USER ROLE ... 99
TABLEOWNER ... 99
TABLESPACE_NAME ... 99
TEMPORARY_TABLESPACE_NAME ... 99
TINY_SIZE_INITIAL_EXTENT ... 99
TINY_SIZE_NEXT_EXTENT ... 99
Objects beginning with SDBT ... 99
Objects beginning with SAUT ... 99
Objects beginning with SABI ... 99

Modules Administration - Forms Module ... 100
Required Fields, Enter Data, Secondary Required Fields, and Status Required fields ... 100
Field Localization View ... 100
Copy Record View ... 100
Special LOVs View ... 101
Custom Menus View ... 102
Custom Menus Field Descriptions ... 102
Granting Access to Custom Menus ... 103
Custom Menu Actions ... 103
Selection Order By View ... 104
Duplicate View ... 104
Allow Duplicate View ... 105

Modules Administration - SIA ... 105
Fields ... 105
Field Source and Field Name ... 105
Default Value ... 105
System ... 105
Required ... 105
Secondary Fields View ... 105

Special Lists of Values ... 106

Custom Menu Actions ... 107
Database Table 107
Defining Custom Actions 108
Converting Custom Menus to Custom Actions 109

Charts and Metrics ... 110
Responsibilities ... 110
Filtered Metrics ... 110
Charts ... 110
Maximum Chart Records ... 110
Charts Home Directory ... 110
Notes on Charts in Office 2007 ... 111
Batch Processes ... 112
Generate All Chart Images ... 112
Generate Charts ... 112
Generate Metrics ... 112
Business Rules ... 113
Charts and Metrics Settings Rule ... 113
Installation Parameters ... 113
CHART_INVENTORY_VALUATION ... 113
CHART THUMBNAIL GENERATION ... 114
CHART THUMBNAIL PROCESSING ... 114
Functions ... 114
Display Trusted Sites Link ... 114

Report Administration Module ... 115

Business Rules 115
Web Configuration Rule 115
Custom Reports........ 116
Naming Conventions 116
Reports 116
Views 116
Creating a New Custom Report 116
Find the Information for the Report 117
Locate Information Using various Database Resources 117
Create Report Executables 117
Create a View for the Report 117
Additional Notes 118
Build the Report 118
Create the Report File 118
Design the Data Model 118
Design the Layout 119
Build Selection Screens for the Report 120
Set up the Environment 120
Test the Environment 120
Build a Custom Selection Screen 121
Create/Add a Custom Selection Screen to the Custom Report 121
Make the Report Available to Users 122
Responsibility Module 124
Responsibility Types 124
Copy Record 125
RESPONBL - COPY RECORD 125
Application Security........ 125
Sequence Numbers Module 127
Fields 127
Table Name 127
Sequence Number 127
Prefix 127
Length 127
System 127
User Profile Module........ 128
Administrator Access to User Profile Records 128
Business Rules 129
Password Security Rule 129
Printer Alias Rule 130
Batch Processes 131
Synchronize User - sdbp_clean_user_n_user_profile; 131
Copy Record 131
USERPROF - COPY RECORD 131
Functions 131
Activate Pins 131
Synergen Password 131
User-Defined Fields Module 132
User-Defined Fields on Related Tables 132
UDF Setup Window 132
Table Definition 133
Determining Which Windows Show UDFs 133
Workflow Groups Module........ 135
Fields 135
Group Owner 135
User Name 135
Public 135
Group Name 135
Description 135
People in Group and People Not in Group 135
The Add Button 135

The Add All Button ... 135
The Remove Button ... 135
The Remove All Button ... 135
Copy Group ... 135

3 Resource Subsystem ... 136

Account Structure Module ... **136**
Fields ... 136
Segment Name ... 136
Length ... 136
Use Code Table? ... 136
Required? ... 136
Delimiter Character and Position Indicator ... 136
Code Tables ... 137
Code Table 251 to Code Table 260: ACCOUNT SEGMENT 1 to 10 ... 137

Accounting Periods Module ... **138**
Business Rules ... 138
Account Period Override Rule ... 138

Pay Periods Module ... **139**
Business Rules ... 139
End of Period Processing Rule ... 139

Department Module ... **142**
Fields ... 142
Department and Description ... 142
Parent and Child Department Fields ... 142
Charts ... 142
S_CHT126 - Departmental Costs Summary ... 142
Copy Record ... 142
DEPT- COPY RECORD ... 142

Area Module ... **142**
Fields ... 142
Department and Description ... 142
Area and Description ... 142
Copy Record ... 142
AREA - COPY RECORD ... 142

Account Module ... **143**
Fields ... 143
Account Number ... 143
Reference ID Field ... 143
Work Request Route Field ... 143
Budget Type Field ... 143
Business Rules ... 144
Budget Checking Rule ... 144
Budget Checking by Document Rule ... 145
Budget Checking Skip Accounts Rule ... 146
Expense Codes Rule ... 146
Code Tables ... 147
Code Table 251 to Code Table 260: ACCOUNT SEGMENT 1 to 10 ... 147
Code Table 1195 - CCB Expense ... 147
Code Table 1196 - CCB Install Remove Flag ... 147
Copy Record ... 147
ACCTDATA - COPY RECORD ... 147
Functions ... 147
View External Actual Costs ... 147
Reports ... 147
S_RPT204 - Purchase Order Expensing Account Detail Report ... 147
Views ... 148
Period Costs ... 148

Account Distribution Module **149**
Fields 149
Sequence No.: Account Distribution ID 149
Batch Processes 149
ACCOUNT DISTRIBUTION TEMPLATE - sdpb_default_accounts_status 149
Copy Record 149
ACCTTMPL - COPY RECORD 149

Regulatory Account Module **150**
Fields 150
WIP Account # 150
Usage Code Field 150
Overhead Class 150
Business Rules 150
Regulatory Account Usage Codes 150
Regulatory Account Options 151
Regulatory Account Overhead Class 151
Batch Processes 152
Regulatory Account Cost - sdbp_regulatory_account_cost; 152
Year End Overhead Distribution - sdbp_year_end_oh_cost_dist; 152
Process Fixed Assets - sdbp_work_order.fixed_asset; 152
Copy Record 152
REGACCT - COPY RECORD 152

Storeroom Module **153**
Business Rules 153
Available Quantity Calculation Rule 153
Invoice Setup Criteria Rule 154
Storeroom Demand Allocation Rule 156
Code Tables 156
Code Table 69: Reorder Reviewer Code 156
Code Table 187: Inventory Adjustment Reason Codes (Inventory Quantity Adjustments Action) 156
Copy Record 157
STORERM -COPY RECORD 157
Functions 157
Reorder Wizard 157
Storeroom ABC 157
Storeroom Adjustment 157
Storeroom Reorder 157
Batch Processes 157
Cost Invoice - sdbp_cost_invoice.cost_invoice; 157
Cost Stock - sdbp_cost_stock.cost_stock; 157
End of Period Processing - sdbp_end_of_period_processing; 157
Reset Demand Quantity - sdbp_storeroom_demand; 157
RESET ON ORDER QUANTITY - sdbp_storeroom_on_order; 158
Stock Reorder - sdbp_stock_reoder.stock_reorder; 158
Storeroom Demand - sdbp_storeroom_demand; 158
Storeroom Repair Costs - sdbp_storeroom_repair_costs; 158
Charts 158
S_CHT127 - Inventory Turns 158
S_CHT128 - Inventory Valuation 158
Reports 158
S_RPT050 - Catalog Non-Usage Report 158
S_RPT016 - Catalog (without Quantities) Report 158
S_RPT026 - Inventory Picklist Report 158
S_RPT034 - New Stock Items Report 159
S_RPT032 - New Storeroom Items Report 159
S_RPT035 - Overstock Report 159
S_RPT202 - Purchase Order Inventory Item Cost Report 159
S_RPT115 - Stock Transfer Report 159
S_RPT033 - Storeroom Activity Report 159
S_RPT017 - Storeroom Report with Quantities 159
S_RPT019 - Storeroom Value by Class 159
S_RPT106 - Storeroom Value By Stock Code 159
S_RPT083 - Tax Report for Inventoried Stocked Items 159
S_RPT082 - Tax Report for Non-Stocked Items 159

S_RPT036 - Understock Report 159

Storeroom Setup Module 160

Business Rules 160

ABC Inventory Rule 160

Code Tables 160

Code Table 4: Storeroom Types (Length = 10) 160

Copy Record 161

STORESET - COPY RECORD 161

Master Catalog Module 162

Fields 162

Sequence No.: Stock Code 162

Business Rules 162

Procurement Level Rule (Associated Stock Codes View) 162

Shelf Life Rule (Associated Stock Codes View) 163

Update Primary Vendor Rule (Associated Stock Codes View) 163

Code Tables 164

Code Table 212: Item Class Codes (Length = 10) 164

Code Table 23: Unit of Measure (Length = 4) 164

Code Table 18: Purchasing Commodity Codes (Length = 20) 164

Code Table 159: Federal Tax Codes (Length = 1) 164

Code Table 160: State Tax Codes (Length = 1) 164

Code Table 161: Duty Codes (Length = 1) 164

Code Table 122: Commodity Category Codes (Length = 5) 164

Code Table 123: Commodity Composition (Length = 10) 164

Code Table 6: Hazardous Types (Length = 10) 164

Code Table 360: Quality Classes 164

Code Table 202: Storage Code (Length = 5) 165

Code Table 203: Special Requirements (Length = 5) 165

Code Table 209: Relationship Types (Associated Stock Codes View) (Length = 20) 165

Copy Record 165

CATALOG - COPY RECORD 165

Batch Processes 165

Create BOM Details - sdbp_create_bom_details.create_bom_details; 165

Charts 165

S_CHT127 - Inventory Turns 165

S_CHT128 - Inventory Valuation 165

Views 166

Crafts 166

Asset Module 167

Fields 167

Sequence No.: Asset ID 167

Asset Class 167

Approval Route Field (Permit Template Requirements View) 167

Maintenance Manager 167

Business Rules 168

Asset Runtime Rule 168

Criticality Override Rule 168

Planner Rule 169

Asset Depreciation Rule (Depreciation View) 170

Asset Key Segments Rule (Key Segments View) 171

Code Tables 172

Code Table 25: Building Codes 172

Code Table 29: Asset Types 172

Code Table 40: Criticality Codes 172

Code Table 61: Sources Type for Isolation (Sources to Isolate View) 172

Code Table 62: Required Position for Isolation (Sources to Isolate View) 172

Code Table 75 - 77: Asset Mobile fields 1-3 172

Code Table 105: Specification Categories for Assets 172

Code Table 107: Units (Depreciation View) 172

Code Table 110: Backlog Group 172

Code Table 130: Asset Interface Types - For Input / Output (Asset Interfaces View) 172

Code Table 230: Asset Record Types 172

Code Table 231: Location 173

Code Table 1192: Riva Asset Type ... 173
Copy Record ... 173
ASSET ... 173
Functions ... 173
Create Activity Log From Asset ... 173
Create Emergency Work Order Asset ... 173
Create Work Order Asset ... 173
Create Work Request Asset ... 173
Create Specification ... 173
View GIS ... 174
Reports ... 174
S_RPT089 - Asset Listing By Type and Class Report ... 174
S_RPT091 - Historic Cost Performance by Asset Report ... 174
S_RPT090 - PM By Asset Report ... 174
S_RPT007 - Process Report with Asset Detail ... 174
Batch Processes ... 174
Cost Asset - sdbp_cost_asset; ... 174
Create BOM Details - sdbp_create_bom_details.create_bom_details; ... 174
Depreciate Assets - sdbp_end_period_depreciation; ... 174
Charts ... 174
S_CHT148 - Planned Vs. Unplanned Downtime ... 174
Metrics ... 174
S_MTRC6 - Percent of Planned Downtime - sdbp_metric_pct_plan_outage ... 174
Views ... 175
Associated Permit Requirements ... 175
Asset Depreciation Accounts ... 175
Asset Interfaces ... 175
Permit Template Requirements ... 176

Asset Activity Log Module... 177
Fields ... 177
Sequence No.: Asset Log ID ... 177
Functions ... 177
Create Activity Log From Asset ... 177
Create Emergency Work Order Asset ... 177
Create Work Order Asset ... 177
Create Work Request Asset ... 177
Create Specification ... 177
Charts ... 177
S_CHT148 - Planned Vs. Unplanned Downtime ... 177
Metrics ... 178
S_MTRC6 - Percent of Planned Downtime - sdbp_metric_pct_plan_outage ... 178

Asset Class Module... 179
Business Rules ... 179
Asset Depreciation Rule (Depreciation Parameters View) ... 179
... 180
Code Tables ... 180
Code Table 107: Units (Depreciation Parameters View) ... 180
Code Table 601: Asset Class Type ... 180
Copy Record ... 180
ASSETCLS - COPY RECORD ... 180
Views ... 180
Condition Assessment ... 180
Basis (Condition Assessment View) ... 180
Depreciation Parameters ... 182
Inspection Criteria ... 182
Condition Rating Basis ... 182
Category/Defect Type ... 182
Weight ... 183
Pass Fail Criteria and Points ... 183
Defect Classification and Grade ... 183
Defect Severity and Points ... 183

Asset Inspection Data Module ... 184
Fields ... 184

Sequence No.: Inspection ID 184
Code Tables 184
Code Table 23: Unit of Measure 184
Code Table 181: Asset Inspection Type 184
Code Table 182: Asset Inspection Reason 184
Code Table 183: Weather Condition 184
Code Table 244: Ground Condition 184
Code Table 245: Asset Inspection Severity (Observations View) 184
Reports 184
S_RPT150 - Asset Inspection Worksheet 184

Operational Data Module 186

Operational Tolerance Module 186
Fields 186
Sequence No.: Operational Tolerance ID 186
Code Tables 186
Code Table 70: Measurement Type 186
Copy Record 186
OPERTOL - COPY RECORD 186

Asset Data Module 187
Business Rules 187
Default Directories Rule 187

Component ID Module 188
Fields 188
Sequence No.: Component ID 188
Stock Code 188
Serial No. 188
Current Location 188
Bill of Materials 188
Last Install Date 188
Code Tables 189
Code Table 221: Component Types 189
Code Table 63: Tag Types 189
Code Table 230: Asset Record Types 189
Business Rules 189
Component ID Rule 189
Component Processing Rule 190
Default Directories Rule 191
Specification Upload Defaults 192
Web Configuration Rule 192
Copy Record 193
COMPID - COPY RECORD 193
Functions 193
Create Work Order Component 193
Create Work Request Component 193
Reports 193
S_RPT011 - Component ID Report 193

Compatible Structure Module 194
Fields 194
Sequence No.: Compatible Structure 194
Code Tables 194
Code Table 23: Unit of Measure 194
Code Table 225: Compatible Unit Business Unit 194
Code Table 226: Compatible Unit Class 194
Code Table 227: Compatible Unit Equipment Group 194
Copy Record 194
COMPSTRU 194
Functions 195
Update Active CU/CS 195

Compatible Unit Module 196
Fields 196
Sequence No.: Compatible Unit ID 196

Code Tables 196
Code Table 22: Vendor Characteristic Types (Characteristics View in Vendor module) 196
Code Table 23: Unit of Measure 197
Code Table 224: Compatible Unit Difficulty (Functions View) 197
Code Table 225: Compatible Unit Business Unit 197
Code Table 226: Compatible Unit Class 197
Code Table 227: Compatible Unit Equipment Group 197
Code Table 1197: Compatible Unit Type 197
Business Rules 198
Compatible Unit Defaults Rule 198
Compatible Unit Function Rule 199
Functions 199
Copy to New Compatible Unit 199
Show CU Location 199
Show CU on Work Order 199
Replace CU Material Item 199
Update Active CU/CS 200
Reports 200
S_RPT151 - Compatible Units Audit Report 200
Views 200
Accounting 200
Functions 200
Header (Master Catalog module) 200
Conductor Information view (Master Catalog module) 201

Bill of Materials Module 202
Fields 202
Sequence No.: BOM ID 202
Breakdown Indicator 202
Code Tables 202
Code Table 29: Asset Types 202
Copy Record 202
BOMDATA - COPY RECORD 202
Functions 203
Update BOM 203
Batch Processes 203
Create BOM Details - sdbp_create_bom_details.create_bom_details; 203
Reports 203
S_RPT081 - Bill of Material Report 203

Change Request Module 204
Fields 204
Sequence No.: Change Request No. 204
Next Approver Field 204
Code Tables 204
Code Table 136: Create New Asset Transaction Types 204
Code Table 141: Change Asset Information Transaction Types 204
Code Table 162: Dispose of Asset Transaction Types 204
Code Table 163: Change Asset Configuration Transaction Types 204
Code Table 165: Change Request Types 204
Code Table 166: Change Request Classes 204
Code Table 167: Impact Types 204
Code Table 168: Justification Types 204
Business Rules 205
Change Request Record Types Rule 205
Work Order Processing Rule 206
Copy Record 206
CHNGREQ - COPY RECORD 206
Functions 206
Change Request Actions for AVL 207
Change Request Asset 207
Change Request Catalog/Storeroom 207
Reports 207
S_RPT114 - Change Request Report 207

Employee Module 208

Fields 208
Sequence No.: Employee No. 208
Department and Area 208
Auto-Timesheet Schedule Fields 208
Business Rules 209
Craft Rates Rule 209
Scheduled Holidays 209
Timekeeping Authority Rule 210
Batch Processes 211
Auto Create Timesheets - sdbp_auto_create_timesheet.main; 211
Code Tables 211
Code Table 45: Training Courses (Training View) 211
Code Table 46: Payroll Group 211
Code Table 48: Leave Reason Codes (Scheduled Leave View) 211
Code Table 98: Administrative Department 211
Code Table 99: Classification 211
Code Table 111: Overtime Crew (Overtime Standings View) 211
Code Table 112: Overtime Zone (Overtime Standings View) 211
Code Table 208: Employee Job Title 211
Code Table 310: Supervisor Title 212
Copy Record 212
EMPLOYEE - COPY RECORD 212
Functions 212
Employee SSN 212
Employee Wage Rate 212
Reports 212
S_RPT012 - Employee Report 212
S_RPT078 - Holiday Overtime Standing Report 212
S_RPT061 - Wage Rate History Report 212

Attachments Modules 213
Business Rules 213
Attachment Print Configuration Rule 213
Attachment Drive Mapping Rule 214
Attachment Types Rule 214
Printer Alias Rule 215
Web Configuration Rule 216
Printing PDF Attachments 216
Checklist 217
Installation 217
Obtain Ghostscript 217
Install Ghostscript 217
Business Rule Settings for Ghostscript 217
Troubleshooting 218
Error Messages 218
SA_REPORT_QUEUE Table 220
Limitations 221

Document Control Module 223
Fields 223
Sequence No.: Document ID 223
Code Tables 223
Code Table 409: Document Classifications Codes 223
Code Table 276: Document Media Types 223
Code Table 410: Document File Types 223
Copy Record 223
DOCUMENT - COPY RECORD 223
Functions 223
Document to Active 224

MSDS Module 225
Copy Record 225
MSDS - COPY RECORD 225

Chemical Label Module 225
Copy Record 225

MSDSCHEM - COPY RECORD 225

Specification Module 226
Reports 226
S_RPT005 - Specification Report 226

Specification Template Module 226
Fields 226
Sequence No.: Specification ID 226
Code Tables 226
Code Table 37: Specification Types 226
Linked Code Table (i.e.101): Specification Category Codes 226
Views 227
Specification Configuration 227

Standard Notes Module 228
Fields 228
Sequence No.: Standard Notes ID 228
Code Tables 228
Code Table 91: Standard Note Types 228
Copy Record 228
STDNOTES - COPY RECORD 228

Procedure Module 229
Fields 229
Sequence No.: Procedure No. 229
Code Tables 229
Code Table 16: Procedure Types 229
Code Table 28: Procedure Categories 229
Code Table 29: Asset Type 229
Business Rules 230
Procedure Attachment Update 230
Procedures Authority Rule 231
Copy Record 231
PROCEDUR - COPY RECORD 231
Functions 231
Add/Delete Job Hazard 232
Create New Procedure Revision 232
Modify Job Hazard 232
Reports 232
S_RPT003 - Procedures Report 232

Job Hazard Module 233
Fields 233
Sequence No.: Hazard ID 233
Code Tables 233
Code Table 470: Job Hazard Type 233
Code Table 471: Job Hazard CategorY 233
Code Table 472: Protective Equipment 233
Copy Record 233
JOBHZRD - COPY RECORD 233
Functions 233
Revise Procedure 233

Function Module 234
Fields 234
Sequence No.: Function ID 234
Code Tables 234
Code Table 137: Function Types 234
Code Table 110: Backlog Group 234
Copy Record 234
FUNCTION - COPY RECORD 234

Process Module 235
Fields 235
Maintenance Manager Field 235
Planner Field 235

Maintenance and Production Approver Fields ... 235
Department, Area, and Account Fields ... 235
Fixed Asset Field ... 235
Code Tables ... 235
Code Table 138: Process Types ... 235
Code Table 25: Building Codes ... 235
Code Table 110: Backlog Groups ... 235
Code Table 231: Location ... 236
Business Rules ... 236
Planner Rule ... 236
Functions ... 236
Create Work Order Process ... 237
Create Work Request Process ... 237
Copy Record ... 237
PROCESS - COPY RECORD ... 237
Reports ... 237
S_RPT006 - Process Report ... 237
S_RPT007 - Process Report with Asset Detail ... 237

Maintenance Manager Module ... 238
Copy Record ... 238
MAINTMGR - COPY RECORD ... 238

Keys and Locks Module ... 238
Code Tables ... 238
Code Table 515: Set Category (User) ... 238

4 Maintenance Subsystem ... 239

Work Request Module ... 239
Fields ... 239
Sequence No.: Work Request No. ... 239
Approval Route Field ... 239
Business Rules ... 240
Batch Purge Criteria Rule ... 240
Batch Purge Parameters Rule ... 241
Criticality Override Rule ... 242
Default Backlog Groups Rule ... 242
Default Work Request Req Date Rule ... 243
Planner Rule ... 244
Work Request Authority Rule ... 244
Work Request Processing Rule ... 245
Batch Processes ... 246
Purge Work Requests - sdbp_purge_work_requests; ... 246
Code Tables ... 246
Code Table 10: Failure Codes (Length = 10) ... 246
Code Table 110: Backlog Group (Length = 6) ... 246
Code Table 25: Building Codes (Length = 20) ... 246
Code Table 2: Maintenance Classes (Length = 10) ... 246
Code Table 3: Maintenance Categories (Length = 10) ... 246
Code Table 40: Criticality Codes (Length = 1) ... 247
Code Table 41: Work Priority Codes (Length = 1) ... 247
Code Table 139: Downtime Codes (Length = 10) ... 247
Copy Record ... 247
WORKREQ - COPY RECORD ... 247
Functions ... 247
Create Work Request ... 247
Create Work Request Asset ... 247
Create Work Request Component ... 247
Create Work Request Fleet Asset ... 247
Create Work Request Process ... 247
Reports ... 248
S_RPT042 - Work Request Summary Report ... 248

Work Design Module 249
Fields 249
Sequence No.: Work Design No. 249
Approval Route Field 249
Business Rules 250
Compatible Unit Function Rule 250
PO Report Constants Rule 250
Work Design Phase Rule 251
Work Design Processing Rule 251
Code Tables 251
Code Table 22: Vendor Characteristic Types (Characteristics View) 251
Code Table 23 - Units for length (Length = 4) 252
Code Table 159: Federal Tax Codes (Buyer Data View) (Length = 1) 252
Code Table 160: State Tax Codes (Buyer Data View) (Length = 1) 252
Code Table 161: Duty Codes (Buyer Data View) (Length = 1) 252
Code Table 730: Contribution in Aid to Construction (Length = 30) 252
Code Table 731: Work Design Cost Type (Length = 30) 252
Code Table 732: Location Structure Type (Length = 30) 252
Functions 252
UPDATE PRICING FOR WD 252
CREATE WO FROM WORK DESIGN 252
ROUTE TO DESIGNER 252
Reports 252
S_RPT154 - Work Design 252
S_RPT156 - Work Design Comparison 252
S_RPT155 - Work Design Estimate 252
Copy Record 253
WODESIGN- COPY RECORD 253

Work Order Module 254
Fields 254
Sequence No.: Work Order No. 254
Approval Route 254
Business Rules 255
Alerts Rule 255
Batch Purge Criteria Rule 256
Batch Purge Parameters Rule 257
Planner Rule 258
S_RPT071 Crew Craft Columns Rule 259
Work Order Aging Rule 259
Work Priority Defaults Rule 260
Batch Processes 260
Close Work Order - sdbp_close_work_orders; 260
Held for Parts - sdbp_held_for_parts; 260
PM Cycle - sdbp_pm_cycle_job.start_job; 260
Process Service Timesheet - sdbp_process_service_timesheet.post_approved_time; 260
Purge Work Order - sdbp_purge_work_order.purge_wo; 261
Purge Work Requests - sdbp_purge_work_requests; 261
Finish WO - sdbp_finish_wo; 261
PM Finish - sdbp_pm_finish; 261
Reset Demand Quantity - sdbp_storeroom_demand; 261
Code Tables 261
Code Table 2: Maintenance Classes (Length = 10) 261
Code Table 3: Maintenance Categories (Length = 10) 261
Code Table 41: Work Priority (Length = 1) 261
Code Table 110: Backlog Group (Length = 6) 261
Code Table 120: Crew Event Types (Length = 15) 262
Functions 262
Activate WO Material 262
Add Customer Contributed 262
Allow WO Project Update 262
Create Emergency Work Order 262
Create Emergency WO Fleet Asset 262
Create Emergency WO Asset 262
Create Permit From WO 262
Create WO From Benchmark 262

Create Work Order 262
Create Work Order Process 262
Create Work Order Fleet Asset 262
Create Work Order Component 262
Create Work Order Asset 263
Reconcile CU 263
Repair Removed Part 263
Search Duplicate Permits 263
Show CU Location 263
Show CU on WO 263
Update Benchmark Work Order 263
Update Process on Work Order 263
WO Active to Planning 263
WO Closed to Finished 263
WO Finished to Active 263
WO Finished to Closed 263
WO to Active 263
Work Type Update 263
Charts 263
S_CHT123 - Actual Cost to Planning Estimate 263
S_CHT124 - Corrective vs. Preventive Work Orders 264
S_CHT145 - Emergency Work Orders 264
S_CHT122 - Planning Accuracy 264
S_CHT146 - Preventive Maintenance Investment 264
S_CHT151 - Work Order Aging 264
Metrics 264
S_MTRC5 - Percent Preventive Work - sdbp_metric_pct_pm_wos 264
S_MTRC10 - Percent PM Investment - sdbp_metric_pct_pm_investment 264
S_MTRC7 - Percent Emergency Work - sdbp_metric_pct_emergency_wos 264
Reports 264
S_RPT046 - Work Order Aging Report 264
S_RPT091 - Historic Cost Performance by Asset Report 264
S_RPT078 - Holiday Overtime Standing Report 265
S_RPT026 - Inventory Picklist Report 265
S_RPT048 - Work Order (Condensed) Report 265
S_RPT071 - Work Order Forecast Report 265
S_RPT044 - Work Order Package Report 265

Work Order Task Module 266
Business Rules 266
Credit Card Purchases Rule 266
Criticality Override Rule 266
Default Backlog Groups Rule 267
Planner Rule 267
PM Route Options Rule 268
Validate Task Report Codes Rule 269
Variable Expense Codes Rule 269
Work Order Processing Rule 271
Work Order Task Planning Rule 275
Work Order Travel Time Rule 275
Code Tables 275
Code Table 12: Shop Codes 275
Code Table 41: Work Priority 276
Code Table 107: Units 276
Code Table 190: Job Codes 276
Code Tables 281 - 285: Report Codes 1-5 276
Code Table 660: Vehicle Reason for Repair 276
Code Table 661: Vehicle Action Taken 276
Code Table 662: Vehicle System Codes 276
Code Table 1194: MWM Order Type (Integration Only) 276
Work Order (Finishing Tasks) 276
Code Table 9: Repair Codes (Length = 10) 276
Code Table 10: Failure Codes (Length = 10) 276
Code Table 51: Failure Modes (Length = 10) 276
Code Table 52: Root Cause Codes (Length = 10) 277
Code Table 189: Work Action Codes (Length = 8) 277

Code Table 222: Component Category (Length = 10) 277
Functions 277
Add Dependent Materials 277
Assign Contractor to CUs 277
Cost and Closeout 277
Create Checkout Request from WO 277
Repair Removed Part 277
Show CU Location 277
Show CU on WO 277
Update MWM 278
Update Reg Acct. Dist 278
Value Assets in Prior Year 278
WO Task to Active 278
Reports 278
S_RPT056 - Work Order Task Aging Report 278
S_RPT041 - Daily Schedule Report 278
S_RPT040 - Workweek Schedule Report 278
S_RPT045 - Work Order Backlog Report 278
S_RPT055 - Work Order Backlog Detail Report 278
S_RPT043 - Work Order Tasks Delayed by Materials Report 278
Batch Processes 278
Cost Asset - sdbp_cost_asset; 278
Cost Adjustment for PM Route - sdbp_cost_route.cost_route; 278
Cost and Closeout - smu_interface.sdbp_mu_interface; 279
Cost Labor - sdbp_cost_labor.cost_labor; 279
Create Change Request - sdbp_create_change_request.create_change_req_from_wo; 279
Finish WO - sdbp_finish_wo; 279
Held for Parts - sdbp_held_for_parts; 279
Process Fixed Assets - sdbp_work_order.fixed_asset; 279
Process Service Timesheet - sdbp_process_service_timesheet.post_approved_time; 279
Reschedule - sdbp_reschedule.job_reschedule; 279
Reset Demand Quantity - sdbp_storeroom_demand; 279
Regulatory Account Cost - sdbp_regulatory_account_cost; 280
Work Order Labor - sdbp_work_order_labor; 280

Benchmark Work Order Module 281
Fields 281
Sequence No.: Benchmark Work Order No. 281
Batch Processes 281
PM Cycle - sdbp_pm_cycle_job.start_job; 281
Work Order Labor - sdbp_work_order_labor; 281
Copy Record 281
BENCHWO - COPY RECORD 281
Functions 281
Create Work Order From Benchmark 282

Crew Module 283
Fields 283
Crew Field 283
Business Rules 283
Auto Generate Daily Schedule Rule 283
Craft Rates Rule 284
Code Tables 284
Code Table 310: Supervisor Title 284
Copy Record 284
CREWMOD - COPY RECORD 284
Reports 284
S_RPT079 - Overtime Standing Report by Crew 284
Views 285
Crew Daily Hours 285
Crew Employee Assignment 285

Crew Activity Log Module 286
Fields 286
Crew 286
Code Tables 286

Code Table 110: Backlog Groups 286
Code Table 120: Crew Event Types 286

Activity Tracking Module 287
Fields 287
Sequence No.: Tracking No. 287
Code Tables 287
Code Table 13: Type of Activity 287
Code Table 14: Type of Activity Units 287
Copy Record 287
ACTTRACK - COPY RECORD 287

Fleet Asset Module 288
Fields 288
Sequence No.: Vehicle ID 288
Class 288
Specification (More Data View) 288
Operational ID (Fleet Operational/Maintenance View) 288
Maintenance Manager 288
Business Rules 289
Asset Depreciation Rule 289
Asset Key Segments Rule 290
Downtime Type By Work Type 291
Fleet Constants Rule 291
Fleet Mileage Reasonability Rule 292
Planner Rule 293
Batch Processes 293
Depreciate Assets - sdbp_end_period_depreciation; 293
Code Tables 293
Code Table 38: Drive Types (More Data View) 293
Code Table 39: Fuel Types (More Data View) 293
Code Table 40: Criticality Codes 293
Code Table 12: Shop Codes 294
Code Table 25: Building Codes 294
Code Table 67: Vehicle Make 294
Code Table 510: Vehicle Organization 294
Code Table 511: Vehicle Sub-Organization 294
Code Table 512: Monitoring Group (Fleet Operational/Maintenance View) 294
Vehicle Model Code Tables 294
Copy Record 294
FLTASSET - COPY RECORD 294
Functions 294
Create Activity Log From Asset 295
Create Emergency WO Fleet Asset 295
Create Work Order Fleet Asset 295
Create Work Request Fleet Asset 295
Reports 295
S_RPT075 - Equipment History Summary Report 295
S_RPT077 - Equipment List by Shop Report 295
S_RPT076 - Historical Cost Performance Report 295
S_RPT073 - Mechanic Accountability Report 295

Fleet Work Order Module 296
Fields 296
Sequence No.: Fleet Work Order No. 296
Code Tables 296
Code Table 3: Maintenance (Length = 10) 296
Code Table 2: Maintenance Classes (Length = 10) 296
Code Table 12: Shop Codes (Length = 10) 296
Code Table 41: Work Priority Codes (Length = 1) 296
Code Table 107: Meter Units (Length = 15) 296
Functions 296
Create Checkout Request from WO 297
Log Fleet Downtime 297
Repair Removed Part 297

Fleet Work Order Task Module 298

Fields 298
Permit Types LOV (Work Order Permit View) 298
Code Tables 298
Code Table 190: Job Codes (Length = 10) 298
Code Table 281 - 285: Report Codes 1 - 5 (Length = 10) 298
(Optional) Code Table 660: Vehicle Reason for Repair (Length = 10) 298
Code Table 661: Vehicle Action Taken (Length = 10) 298
Code Table 662: Vehicle System (Length = 3) 298
Code Table 1150: Vehicle Assembly (Length = 3) 298
Code Table 1151: Vehicle Component (Length = 3) 298

Fleet Benchmark Work Order Module 299
Fields 299
Sequence No.: Fleet Benchmark Work Order 299
Business Rules 299
PM Fleet Types Rule 299
Copy Record 300
BENCHFLT- COPY RECORD 300

Fleet PM Control 301
Fields 301
Sequence No.: Control No. 301
Class 301
Code Tables 301
Code Table 67: Vehicle Make (Length = 10) 301
Vehicle Model Code Tables 301
Copy Record 301
FLEETPMC - COPY RECORD 301

Reservations/Motorpool Module 303
Fields 303
Sequence No.: Reservation No. 303
Code Tables 303
Code Table 24: Rental Types (Length = 10) 303
Reports 303
S_RPT072 - Reservation Dispatch Report 303

Operational Schedule Module 304
Fields 304
Sequence No.: Operational ID 304
Code Tables 304
Code Table 570: Hour 304
Code Table 571: Minute 304
Code Table 710: Week Days 304
Copy Record 304
OPERSCHD - COPY RECORD 304

Permit Template Module 305
Fields 305
Sequence No.: Template ID 305
Code Tables 305
Checklist Title - User Defined Code Table 305
Checklist Description - User Defined Code Table 305
Duration - User Defined Code Table 305
Copy Record 306
PERMTMPL - COPY RECORD 306

Permits Module 307
Fields 307
Sequence No.: Permit No. 307
Approval Route Field 307
Code Tables 307
Code Table 8: Permit Cancel Codes (Length = 10) 307
Code Table 62: Current Position 307
Business Rules 308
Permit Type Rule 308
Permit Processing Rule 309

Attachment Printing Rule 309
Copy Record 310
PERMIT - COPY RECORD 310
Functions 310
Add Tag Points 310
Permit to Active 310
Release All 310
Tag All 310
Verify All 310
Reports 310
S_RPT098 - Confined Space Report 310
S_RPT101 - Confined Space Report [Blank] 310
S_RPT099 - Hot Work Permit Report 310
S_RPT102 - Hot Work Permit Report [Blank] 310
S_RPT113 - Lockout Tagout Report 311
S_RPT100 - Safety Work Permit Report 311

Tag Point Module 312
Fields 312
Sequence No.: Tracking No. 312
Code Tables 312
Code Table 1193: Tag Point Category 312
Code Table 25: Building Codes 312
Code Table 61: Source Type 312
Code Table 62: Positions for Isolation 312
Business Rules 313
Permit Type Rule 313
Copy Record 313
TAGPOINT - COPY RECORD 313
Functions 313
Create Tag List 314

Tag List Module 315
Fields 315
Sequence No.: Tracking No. 315
Copy Record 315
TAGLIST- COPY RECORD 315
Functions 315
Associate Tag List 315

PM Master Module 316
Fields 316
Sequence No.: PM Master No. 316
Code Tables 316
Code Table 198: PM Categories 316
Code Table 107: Units 316
Code Table 108: Event Groups 316
Code Table 109: Event Types 316
Business Rules 317
Default Backlog Groups Rule 317
PM Master Parameters Rule 317
PM Schedule Basis Rule 319
PM Seasonal Adjustments Rule 320
Batch Processes 320
PM Cycle - sdbp_pm_cycle_job.start_job; 320
PM Finish - sdbp_pm_finish; 320
PM Routing - sdbp_pm_routing; 320
Copy Record 320
PMMASTER- COPY RECORD 320
Functions 321
Cancel PM Master Backlog 321
Credit PM 321
Show Cycle This PM Now Action 321
Show Cycle PM Group Now Action 321
Update Estimate Hours 321
Update Estimate Quantity 321

Reports 321
    S_RPT090 - PM By Asset Report 321
    S_RPT074 - Preventive Maintenance Report 321
Charts 321
    S_CHT124 - Corrective vs. Preventive Work Orders 321
    S_CHT142 - Late PMs for Safety Equipment 321
    S_CHT143 - Late Preventive Maintenance Work Orders 321
    S_CHT164 - PM Forecast Months 322
    S_CHT129 - PM Forecast Months - Estimated Duration 322
    S_CHT130 - PM Forecast Weeks 322
    S_CHT165 - PM Forecast Weeks - Estimated Duration 322
    S_CHT131 - PM History Months 322
    S_CHT132 - PM History Weeks 322
    S_CHT146 - Preventive Maintenance Investment 322
    S_CHT147 - Preventive Work Orders 322
Metrics 322
    S_MTRC5 - Percent Preventive Work - sdbp_metric_pct_pm_wos 322
    S_MTRC10 - Percent PM Investment - sdbp_metric_pct_pm_investment 322
    S_MTRC8 - Late PMs for Safety Equipment - sdbp_metric_late_pms_safety 323
    S_MTRC9 - Late PMs - sdbp_metric_late_pm 323

PM Event Module 324
Code Tables 324
    Code Table 108: Event Groups 324
    Code Table 109: Event Types 324
Copy Record 324
    PMEVENT - COPY RECORD 324

PM Route Module 325
Business Rules 325
    PM Route Options Rule 325
Code Tables 325
    Code Table 20: PM Route Types 325
    Code Table 49: PM Route Task Types (Route Stops View) 325
    Code Table 44: Lube Types (Route Stops View) 325
    Code Table 42: Lube Methods (Route Stops View) 325
Batch Processes 325
    Cost Adjustment for PM Route - sdbp_cost_route.cost_route; 325
    PM Routing - sdbp_pm_routing; 326
Copy Record 326
    PMROUTE - COPY RECORD 326
Reports 326
    S_RPT058 - PM Route Report 326

Project/Subproject Module 327
Fields 327
    Sequence No.: Project ID 327
    Approval Route Field 327
Code Tables 327
    Code Table 310: Supervisor Title 327
Copy Record 327
    PROJECT - COPY RECORD 327
Business Rules 328
    Account Creation from Projects Rule 328
    Project Budget Options Rule 329
    Project Management Rule 330
    Project Work Order Account Rule 331
    Work Order Processing Rule 332
Functions 332
    Allow WO Project Update 332
    Project Closed to Finished 332
    Project Finished to Closed 332
    Project Management 332
    Subproject Approved to Created 332
    Subproject Finished to Approved 333
Batch Processes 333

Project Alert - sdbp_project_alert; 333
Charts 333
S_CHT149 - Project Analysis 333
Views 333
Subproject 333
Microsoft Project Interface 333
Project Management Configuration 333

Runtime Entry Module 335
Code Tables 335
Code Table 107: Meter Units 335
Business Rules 335
Asset Runtime Rule 335

Daily Schedule Module 336
Business Rules 336
Auto Generate Daily Schedule Rule 336
Default Backlog Groups Rule 337
Work Week Rule 337
Scheduling Options Rule 338
Code Tables 338
Code Table 1190: Daily Schedule Types 338
Code Table 2501: Interruption Codes 338
Batch Processes 338
Reschedule - sdbp_reschedule.job_reschedule; 338
PM Cycle - sdbp_pm_cycle_job.start_job; 338
Functions 339
Activate Checkout Request from Schedule 339
Merge Task WOWeek to Day Schd 339
Reports 339
S_RPT152 - Daily Schedule Assignments Report 339
S_RPT041 - Daily Schedule Report 339
Installation Parameters 339
SCHEDULING TOTAL EST HRS DISP 339

Workweek Schedule Module 340
Business Rules 340
Auto Generate Weekly Schedule Rule 340
Default Backlog Groups Rule 341
Work Week Rule 341
Code Tables 342
Code Table 2500: Daily Schedule Types 342
Code Table 2501: Interruption Codes 342
Batch Processes 342
Reschedule - sdbp_reschedule.job_reschedule; 342
PM Cycle - sdbp_pm_cycle_job.start_job; 342
Functions 342
Merge Task WOWeek to Day Schd 342
Installation Parameters 342
SCHEDULING TOTAL EST HRS DISP 342

Schedule Plan Module 343
Business Rules 343
Work Week Rule 343
Reports 343
S_RPT153 - Schedule Plan Report 343

Direct Charges Module 344
Fields 344
Sequence No.: Direct Charges No. 344
Approval Route Field 344
Owner Field 344
Code Tables 344
Code Table 550: Direct Charge Category Codes 344
Business Rules 345
Direct Charge Types Rule 345

Batch Processes 345
Direct Charges - sdbp_direct_charges.direct_charges; 345
Cost and Closeout - smu_interface.sdbp_mu_interface (job_in, plant_in,'N'); 346
Copy Record 346
ODC - COPY RECORD 346
Functions 346
Cost and Closeout 346

Leave Request Module.......... 347
Business Rules 347
Timekeeping Authority Rule 347
Timekeeping Leave Types Rule 348
Code Tables 348
Code Table 48: Leave Reason Codes 348
Copy Record 349
LEAVEREQ - COPY RECORD 349
Batch Processes 349
Leave Request - sdbp_post_leave; 349
Create New Leave Year sdbp_create_new_leave_year.new_leave_year; 349
Reports 349
S_RPT065 - Employee Pay Period Time Report 349

Payroll Voucher Module.......... 350
Business Rules 350
Payroll Voucher Types Rule 350
Batch Processes 350
Payroll Voucher - sdbp_pay_voucher.pay_voucher; 350

Timekeeping Module 351
Fields 351
Next Approver Field 351
Code Tables 351
Code Table 310: Supervisor Title 351
Business Rules 351
Craft Rates Rule 351
Labor Burden Multipliers Rule 351
Labor Costing Markup Rule 352
Labor Costing Wage Rates Rule 353
Overtime Standings Rule 353
Scheduled Holidays 354
Shift Differential Rates Rule 354
Timekeeping Authority Rule 355
Timekeeping Charge Types Rule 356
Timekeeping Comp Time Request Rule 357
Timekeeping Copy Options Rule 357
Timekeeping Editchecks Rule 358
Timekeeping Labor Earning Type Rule 359
Variable Expense Codes Rule 360
Copy Record 361
TIMESHT - COPY RECORD 361
Functions 361
Approve All Timesheets 361
Cost and Closeout 361
Route Timesheet for Approval 362
Timesheet Wizard 362
Batch Processes 362
Auto Create Timesheets - sdbp_auto_create_timesheet.main; 362
Cost and Closeout - smu_interface.sdbp_mu_interface (job_in, plant_in,'N'); 362
Leave Request - sdbp_post_leave; 362
Post Timesheet - sdbp_post_timesheets.post_time; 362
Reports 362
S_RPT066 - Payroll Report 362
S_RPT067 - Labor Expenditure Summary by Account Report 362
S_RPT068 - Labor Distribution by Account Report 362
S_RPT069 - Labor Distribution by Employee Report 362
S_RPT079 - Overtime Standing Report by Crew 362

S_RPT080 - Overtime Standing Report by Zone ... 362
S_RPT139 - Employee Timekeeping Report ... 362
Charts ... 362
S_CHT138 - Timekeeping Analysis ... 362

5 Purchasing Subsystem ... 363

Vendor Code Structure Module ... 363
Fields ... 363
Segment Name ... 363
Length ... 363
Sequenced? ... 363
Required ... 364
Delimiter Character ... 364

Vendor Module ... 364
Fields ... 364
Sequence No.: Vendor Code ... 364
E-Mail Purchase Orders to Vendors (Characteristics View) ... 364
Business Rules ... 365
Payment Terms Rule ... 365
Vendor Options Rule ... 366
Vendor Performance Attributes Rule (Performance View) ... 367
Vendor Performance Ranges Rule (Performance View) ... 368
Code Tables ... 368
Code Table 22: Vendor Characteristic Types (Characteristics View) ... 368
Code Table 43: FOB ... 368
Code Table 56: Vendor Characteristics (Characteristics View) ... 368
Code Table 68: Vendor Classification Types (Characteristics View) ... 368
Code Table 122: Commodity Category Codes (Commodities View) ... 368
Code Table 123: Commodity Composition (Commodities View) ... 369
Code Table 115: Auditor Codes (Approved Vendors View) ... 369
Code Tables 173, 174, 177, 178, and 179: Vendor Capability Code Segments 1-5 (Capabilities View) 369
Code Table 175: Vendor Evaluation Grades (Evaluation View) ... 369
Code Table 65: Purchasing Vendor Characteristics (Characteristics View) ... 369
Copy Record ... 369
VENDOR - COPY RECORD ... 369
Functions ... 370
Set Vendor Auto Pay Indicator ... 370
Batch Processes ... 370
Vendor Performance - sdbp_vendor_performance.vendor_performance; ... 370
Charts ... 370
S_CHT1136 - PO By Vendor - Count of POs ... 370
S_CHT135 - PO By Vendor - Total Amount ... 370
Reports ... 370
S_RPT142 - Deficient Vendors Report ... 370
S_RPT201 - Purchase Order Listing Report - Grouped by Vendor Code ... 370
S_RPT207 - Purchase Order Report - Vendor Copy ... 370
S_RPT200 - Purchase Order Vendor Report ... 370
S_RPT018 - Storeroom Value by Vendor ... 371
S_RPT143 - Superior Vendor Performance Data ... 371
S_RPT022 - Vendor Characteristics Report ... 371
S_RPT213 - Vendor Classification Activity Report ... 371
S_RPT124 - Vendor Label Report ... 371
S_RPT021 - Vendor Listing Report ... 371
S_RPT144 - Vendor Performance by Buyer ... 371
S_RPT145 - Vendor Performance Data ... 371
S_RPT141 - Vendors with 3 or More Deficiencies ... 371

Requisition Module ... 372
Fields ... 372
Sequence No.: Requisition Number ... 372
Approval Route Field ... 372
Buyer field ... 372

Ship To field 372
Currency (Buyer Data View) 372
Business Rules 373
Alerts Rule 373
Batch Purge Criteria Rule 374
Batch Purge Parameters Rule 375
Credit Card Purchases Rule 376
Requisition to PO Rule 376
Purchasing Options Rule 377
Code Tables 377
Code Table 7: Location (Length = 10) 377
Code Table 23: Unit of Measure (Line Item (Detail) View) (Length = 4) 377
Code Table 26: End Use Code (Buyer Data View) (Length = 2) 377
Code Table 43: FOB (Buyer Data View) 378
Code Table 159: Federal Tax Codes (Buyer Data View) (Length = 1) 378
Code Table 160: State Tax Codes (Buyer Data View) (Length = 1) 378
Code Table 161: Duty Codes (Buyer Data View) (Length = 1) 378
Functions 378
Create Req from Blanket 378
Create Shipping Memo 378
Create Templates from REQ 378
Resend Approval Request 378
Batch Processes 378
Purge Requisitions - sdbp_purge_requisitions; 378
Requisition Template Status Check - sdbp_req_template_status_chk; 378
Metrics 378
S_MTRC3 - Total Lead Time - sdbp_metric_total_lead_time 378
Reports 379
S_RPT054 - Requisition Report 379
S_RPT215 - Requisition Report (by Vendor) 379

Purchase Order Module 380
Fields 380
Sequence No.: Purchase Order 380
Approval Route Field 380
Buyer field 380
Ship To field 380
Currency (Buyer Data View) 380
User-Defined 380
Business Rules 381
Alerts Rule 381
Batch Purge Criteria Rule 382
Batch Purge Parameters Rule 383
Credit Card Purchases Rule 384
PO Aging Rules Rule 384
PO Report Constants Rule 385
PO Report Status Codes Rule 386
Purchasing Options Rule 387
Code Tables 388
Code Table 7: Location (Length = 10) 388
Code Table 23: Unit of Measure (Line Item (Detail) View) (Length = 4) 388
Code Table 26: End Use Code (Buyer Data View) (Length = 2) 388
Code Table 43: FOB (Buyer Data View) (Length = 20) 388
Code Table 150: Confirmation Types (Buyer Data View) (Length = 10) 388
Code Table 154: Expediting Item Status (Expedite View, Expedite Items Detail) (Length = 15) 388
Code Table 159: Federal Tax Codes (Buyer Data View) (Length = 1) 388
Code Table 160: State Tax Codes (Buyer Data View) (Length = 1) 389
Code Table 161: Duty Codes (Buyer Data View) (Length = 1) 389
Functions 389
Change PO Auto Pay Indicator 389
Copy PO from PO 389
Transfer Canceled PO Items 389
Resend Approval Request 389
Batch Processes 389
Purge Requisitions - sdbp_purge_requisitions; 389
Vendor Performance - sdbp_vendor_performance; 389

Check Received PO Item - sdbp_chk_issd_po_item; ... 389
PO Closeout - sdbp_po_closeout; ... 390
Charts ... 390
S_CHT133 - PO By Buyer - Total Amount ... 390
S_CHT134 - PO By Buyer - Count of POs ... 390
S_CHT135 - PO By Vendor - Total Amount ... 390
S_CHT1136 - PO By Vendor - Count of POs ... 390
Metrics ... 390
S_MTRC2 - Internal Time to Issue PO - sdbp_metric_int_time_to_issue ... 390
S_MTRC3 - Total Lead Time - sdbp_metric_total_lead_time ... 390
S_MTRC4 - External Time to Receive Parts - sdbp_metric_ext_time_rec_part ... 390
Reports ... 390
S_RPT105 - Accruals By Account Report ... 390
S_RPT214 - Contract PO Activity Report ... 390
S_RPT107 - Delivery Receiving Report ... 390
S_RPT027 - Delivery Ticket Report ... 390
S_RPT212 - Open Purchase Orders Detail Report ... 391
S_RPT211 - Open Purchase Orders Summary Report ... 391
S_RPT024 - Purchase Order Accruals (Unpaid Receipts) Report ... 391
S_RPT062 - Purchase Order Accruals (Unpaid POs) Report ... 391
S_RPT204 - Purchase Order Expensing Account Detail Report ... 391
S_RPT202 - Purchase Order Inventory Item Cost Report ... 391
S_RPT203 - Purchase Order Listing Report - Grouped by PO Number ... 391
S_RPT201 - Purchase Order Listing Report - Grouped by Vendor Code ... 391
S_RPT029 - Purchase Order Over Received Report ... 391
S_RPT208 - Purchase Order Report - Department Copy ... 391
S_RPT209 - Purchase Order Report - Finance Copy ... 391
S_RPT207 - Purchase Order Report - Vendor Copy ... 391
S_RPT200 - Purchase Order Vendor Report ... 391
S_RPT053 - Purchase Order Report ... 391
S_RPT112 - Purchase Order Report with Standard Notes and Attachments ... 391
S_RPT023 - Purchase Orders Not Yet Received Report ... 391
S_RPT010 - Purchase Orders with Returns Report ... 391
S_RPT063 - Ready for Payment Report ... 392
S_RPT025 - Receiving Report ... 392
S_RPT216 - Receiving Report ... 392
S_RPT037 - Receiving Worksheet Report ... 392

Change Order Module ... 393
Fields ... 393
Approval Route Field ... 393
Business Rules ... 393
C.O. Auto Approve Percentage Rule ... 393
Purchasing Options Rule ... 394
Functions ... 394
Resend Approval Request ... 394

Blanket Contract Module ... 395
Fields ... 395
Sequence No.: Blanket Contract No. ... 395
Business Rules ... 395
Attachment Drive Mapping Rule ... 395
Multiple Active Contracts Rule ... 396
Blanket Contract Processing Rule ... 396
Blanket Contract Access List Rule ... 397
Code Tables ... 398
Code Table 35: Blanket Contract Category Codes ... 398
Copy Record ... 398
BLNKTCON - COPY RECORD ... 398
Functions ... 398
CREATE BLANKET CONTRACT REVS ... 398
CREATE BLNKET CONTRACT REV HIST ... 398
DUPLICATE BLANKET TO PO ... 398
Batch Processes ... 398
Auto Activate Blankets - sdbp_blanket_services.auto_activate; ... 398
Auto Close Blankets - sdbp_blanket_services.auto_close; ... 398

Reports 398
S_RPT206 - Blanket Contract Report 398
Request for Quotes Module 399
Fields 399
Sequence No.: Request for Quotes 399
Next Approver Field 399
Business Rules 399
Default Directories Rule 399
Vendor Performance Ranges Rule 400
Code Tables 401
Code Table 17: Issue Methods (Vendor (Detail) View) 401
Copy Record 401
RFQ - COPY RECORD 401
Functions 401
Add Vendor After RFQ Issued 401
Award RFQ 401
Export RFQ 401
Import RFQ 401
Issue RFQ 401
Reports 402
S_RPT093 - Request for Quotes Report 402
Invoicing Module 403
Fields 403
Approval Route Field 403
Business Rules 403
Federal Tax Rebate Rule 403
Invoice Setup Criteria Rule 404
Invoice Prorate Defaults Rule 406
Invoice Tolerances Rule 407
Payment Terms Rule 408
Purchasing Options Rule 409
Custom LOV Notes for the Invoicing Module 409
Functions 409
Display Accrual Tax Total 409
Invoice Account Override 409
Invoice - Override Discrepant 410
Invoice - Resolve Discrepant 410
Invoice Pay to Vendors 410
Code Tables 410
Code Table 159: Federal Tax Codes (Length = 1) 410
Code Table 160: State Tax Codes (Length = 1) 410
Code Table 161: Duty Codes (Length = 1) 410
Code Table 157: Invoice Prorate Options 410
Batch Processes 410
Invoice Resolution - sdbp_invoice-resolution; 410
Cost Invoice - sdbp_cost_invoice.cost_invoice; 410
Automatic Invoicing - sdbp_ers_invoicing; 410
Reports 410
S_RPT064 - Invoice Variance Report 410
S_RPT024 - Purchase Order Accruals (Unpaid Receipts) Report 410
Invoice Batch Module 411
Fields 411
Sequence No.: Batch ID 411
Code Tables 411
Code Table 243: Process Level 411
Warranty Claim Module 412
Fields 412
Sequence No.: Warranty No. 412
Functions 412
CREATE WARRANTY CLAIM 412
Batch Processes 412
Warranty Expiration Alerts - sdbp_process_warranty_alerts; 412

Warranty Module 413
Fields 413
Sequence No.: Warranty No. 413
Business Rules 413
Warranty Processing Rule 413
Functions 413
CREATE WARRANTY CLAIM 414
Copy Record 414
WARRANTY - COPY RECORD 414
Batch Processes 414
Warranty Expiration Alerts - sdbp_process_warranty_alerts; 414

Cost Adjustment Module 415
Fields 415
Sequence No.: Adjustment ID 415
Next Approver Field 415
Business Rules 415
Cost Adjustments Rule 415
Batch Processes 416
Asset Cost Allocation - sdbp_cost_asset; 416
Cost Adjustment for PM Route - sdbp_cost_route.cost_route; 416
Cost Adjustment - sdbp_cost_adjustment; 416

Purchasing Log Module 417
Code Tables 417
Code Table 121: Purchasing Event Types 417

Blanket Contract Log Module 417

Service Contract Module 418
Fields 418
Sequence No.: Contract 418
Code Tables 418
Code Table 35: Contract Category Codes 418
Copy Record 418
SERVCONTR - COPY RECORD 418
Reports 418
S_RPT087 - Service Contract Accrued Cost Report 418
S_RPT085 - Service Contract Details Report 418
S_RPT086 - Service Contract Summary Report 418

Service Contract Invoice Module 419
Code Tables 419
Code Table 700: Job Reference Codes 419
Business Rules 419
Serv Invoice Account Override Rule 419
Serv Invoice Prorate Defaults Rule 420
Serv Invoice Tolerances Rule 421
Functions 421
Serv Invoice Account Override 421
Service Invoice Export Wizard 421
Batch Processes 421
Cost Service Invoice - sdbp_cost_service_invoice.cost_service_invoice; 421
Accumulate Posted Service Timesheets - sdbp_process_service_timesheet.accumulate_posted; 421

Service Contract Timesheets Module 422
Business Rules 422
Service Timesheet Charge Types Rule 422
Code Tables 422
Code Table 700: Job Reference Codes 422
Copy Record 422
CTIMESHT - COPY RECORD 422
Functions 423
Copy Service Timesheet 423
Copy to New Service Contract 423
Service Contract to Active 423

Batch Processes 423
Process Service Timesheet - sdbp_process_service_timesheet.post_approved_time; 423

6 Inventory Subsystem 424

Checkout Request Module 424
Business Rules 424
Alerts Rule 424
Bar Code Configuration Rule 425
Checkout Request Rule 425
Storeroom Demand Allocation Rule 427
Variable Expense Codes Rule 428
Code Tables 429
Code Table 7: Deliver To Location (Length = 10) 429
Code Table 100: Checkout Request Priority (Length = 2) 429
Copy Record 429
CHKREQST - COPY RECORD 429
Functions 430
Add Items From Work Order 430
Activate Checkout Request from Schedule 430
Reports 430
S_RPT026 - Inventory Picklist Report 430

Stock Checkout Module 431
Business Rules 431
Checkout Allowable Charge Type Rule 431
Checkout Processing Rule 431
Barcoding Checkout Rule 432
.... 432
Optional Message Presentation Rule 433
Variable Expense Codes Rule 433
Functions 435
Checkout All Planned Items 435
Reports 435
S_RPT020 - Issue Ticket Report 435

Stock Transfer Module 436
Business Rules 436
Alerts Rule 436
Bar Code Configuration Rule 437
Receiving Configuration Rule 437
Reports 438
S_RPT115 - Stock Transfer Report 438
Storeroom Stocking Module 439
Business Rules 439
Bar Code Configuration Rule 439

Reorder Review Module 440
Business Rules 440
Batch Stock Reorder Rule 440
Batch Processes 443
Stock Reorder - sdbp_stock_reoder.stock_reorder; 443
Functions 443
Reorder Wizard 443
Reports 443
S_RPT028 - About to Reorder Report 443

Receiving Module 444
Business Rules 444
Alerts Rule 444
Bar Code Configuration Rule 445
Default Directories Rule 445
Enforce Receiver Rule 446
Receiving Configuration Rule 446

Specification Upload Defaults ... 447
Web Configuration Rule ... 448
Batch Processes ... 448
Check Received PO Item - sdbp_chk_issd_po_item; ... 448
Invoice Resolution - sdbp_invoice-resolution; ... 448
Cost Accruals - sdbp_cost_accruals.cost_accruals; ... 448
Code Tables ... 448
Code Table 81 - Loftware Labels (Length = 15) ... 448
Functions ... 449
Bar Code Print Labels ... 449
Receive More Than Ordered ... 449
Receive All Items As Ordered ... 449
Reports ... 449
S_RPT107 - Delivery Receiving Report ... 449
S_RPT047 - Receipt Delivery Worksheet Report ... 449
S_RPT025 - Receiving Report ... 449
S_RPT216 - Receiving Report ... 449
S_RPT037 - Receiving Worksheet Report ... 449

Multi-Step Receiving Module ... 450
Fields ... 450
Sequence No.: Delivery ID ... 450
User-Defined ... 450
Business Rules ... 450
Alerts Rule ... 450
Bar Code Configuration Rule ... 451
Barcode Label Printers Rule ... 452
Receiving Configuration Rule ... 452
Vendor Performance Attributes Rule (Shipment Attributes View) ... 453
Batch Processes ... 453
Check Received PO Item - sdbp_chk_issd_po_item; ... 453
Cost Accruals - sdbp_cost_accruals.cost_accruals; ... 453
Invoice Resolution - sdbp_invoice-resolution; ... 453
Vendor Performance - sdbp_vendor_performance; ... 454
Code Tables ... 454
Code Table 57: Container Types (Length = 10) ... 454
Code Table 81 - Loftware Labels (Length = 15) ... 454
Code Table 58: NCM Disposition Codes (Shipment Attributes View) (Length = 20) ... 454
Functions ... 454
Accept Quality Items ... 454
Bar Code Print Labels ... 454
MSR Force PO Complete ... 454
Not Vendor Caused ... 455
Receive More Than Ordered ... 455
Receive All Items As Ordered ... 455
Reports ... 455
S_RPT107 - Delivery Receiving Report ... 455
S_RPT047 - Receipt Delivery Worksheet Report ... 455
S_RPT025 - Receiving Report ... 455
S_RPT037 - Receiving Worksheet Report ... 455
S_RPT140 - Completed NCMs ... 455
S_RPT216 - Receiving Report ... 455

Material Disposition Module ... 456
Business Rules ... 456
Repairable Processing Rule ... 456
Code Tables ... 456
Code Table 59: Material Disposition Repair Types (Length = 10) ... 456
Functions ... 457
Repair Removed Part ... 457
Batch Processes ... 457
Storeroom Repair Costs - sdbp_storeroom_repair_costs; ... 457
Managing Advanced Materials ... 457
Set Up for Advanced Materials Processing Functionality ... 457
Repairable Processing Business Rule ... 457
Component Processing Business Rule ... 457

Physical Inventory Module ... 458
Business Rules ... 458
Bar Code Configuration Rule ... 458
Physical Inventory Rules Rule ... 458
Physical Inventory Tolerances Rule ... 459
Functions ... 459
Adjust Store for Recount ... 460
Reports ... 460
S_RPT038 - Physical Inventory Listing Report ... 460
S_RPT039 - Physical Inventory Variance Report ... 460
S_RPT104 - Physical Inventory Listing Report ... 460
S_RPT108 - Inspection/Discrepancy Physical Inventory Report ... 460
S_RPT109 - Property Inventory - Items Not Found Report ... 460

Shipping Memo Module ... 461
Fields ... 461
Sequence No.: Shipping Memo No. ... 461
Business Rules ... 461
Shipping Memo Options Rule ... 461
Copy Record ... 462
SHIPMEMO - COPY RECORD ... 462
Reports ... 462
S_RPT210 - Shipping Memo Report ... 462

Property Management Module ... 463
Fields ... 463
Sequence No.: Property ID ... 463
Code Tables ... 463
Code Table 53: Property Types (Length = 20) ... 463
Code Table 55: Property Classes (Length = 20) ... 463
Copy Record ... 463
PROPERTY - COPY RECORD ... 463
Reports ... 463
S_RPT110 - Property Inventory - Discrepancies Report ... 463
S_RPT111 - Property Inventory - Items to be Inventoried Report ... 463
S_RPT109 - Property Inventory Report - Items Not Found ... 463

Consumables Module ... 464
Code Tables ... 464
Code Table 31: Consumable Types (Length = 6) ... 464
Code Table 32: Consumables Source Codes (Length = 8) ... 464

7 Customer Subsystem ... 465

Customer Module ... 465
Fields ... 465
Sequence No.: Customer ID ... 465
Copy Record ... 465
CUSTOMER - COPY RECORD ... 465
Code Tables ... 465
Code Table 15: Country Codes ... 465
Code Table 73: Property Types (Address (Detail) View) ... 465

Service Request Module ... 467
Fields ... 467
Sequence No.: Service Request No. ... 467
Next Approver Field ... 467
Business Rules ... 467
Expense Codes Rule ... 467
Code Tables ... 468
Code Table 240: Service Request Types ... 468
Code Table 241: Problem Codes ... 468
Code Table 242: Deposit and Payment Types (Billing Information View) ... 468
Code Table 246: Disconnect Location ... 468

Code Table 1195 - CCB Expense 468
Code Table 1196 - CCB Install Remove Flag 468
Copy Record 468
SERVREQ - COPY RECORD 468
Functions 468
Associated Service Request 469
Create WO from Service Request 469
Batch Processes 469
Cost Service Request - sdbp_cost_service_request.cost_service_request_rollup 469
Charts 469
S_CHT140 - Customer Follow-Up Calls 469
Metrics 469
S_MTRC1 - Customer Follow-Up Calls Pending - sdbp_metric_cust_follow_calls 469
Reports 469
S_RPT138 - Service Request Report 469

8 Enterprise Subsystem 470

Asset Type Analysis Module 470

Company Module 470

Enterprise Asset Module 470
Code Table 75 - 77: Asset Mobile fields 1-3 470

Enterprise Catalog Module 470

Organization Module 471

Plant Module 471
Fields 471
Plant 471
Description 471
Company 471
Organization 471
Locale 471
Local Currency and Fiscal Calendar 471
Locale Phone Format 472
Include in Run All Batch? 472
Multi-Plant/ Single Plant Usage 472
Using Multiple Plants 472
When to Use Multiple Plants 472
Separating Data in Oracle Utilities Work and Asset Management 473
Single Plant - Multiple Departments 473
Additional Considerations 473
Business Rules 473
Asset Hierarchy 474
Data Availability 474

Overview

Configuration Guide

This guide provides details about configurable items for each module in the system.

System configuration can be completed in any order according to the needs of your organization. The system is configured by setting business rules, code tables, required fields and default values, sequence numbers, duplication, order by options, accounts, vendor codes, and custom fields menus and lists of values.

Note: Once business rules, account settings, and other configuration items have been set, they should be changed only after careful consideration and consultation with Oracle Utilities Work and Asset Management. Improper changes can disrupt how the system processes your organization’s information.

Use the Table of Contents to see convenient lists of configuration items in each subsystem and module.

New Installations

This guide is generally organized by subsystem and module, however, the following shows a suggested configuration order for new installations:

- Create Users
- Create Responsibilities
- Define the accounting hierarchy
- Configure system-wide settings including batch job control
- Set approvals processing
- Determine the asset hierarchy
- Create stock codes and storeroom structure
- Set additional modules, business rules, and settings according to your business processes

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Chapter 1

General System Setup

This chapter outlines the key items that must be configured upon initial system implementation. Decisions such as whether or not to use auditing, various installation parameters, very commonly used code tables and views, and other parameters should be configured up front before delving into other business processes.

In addition, implementation teams should consider the business rules, functions, and batch processes that may need to be configured in order to determine which objects and functionality users have access to on their home page.

Audit Log

Whenever any of the database tables are modified in any way (usually on insert, delete, or update) the system tracks the change in the Auditing Log.

1. For each table the user wishes to audit, the audit entry in sa_installation_parameters should be set to ON. All others should be set to OFF.
2. After any change, User should run the procedure SDBP_ALTER_TRIGGERS_SAUT from SQL-Plus. This reads the sa_installation_parameters entry, and turns on/off the appropriate trigger based on what it reads in sa_installation_parameters.

Batch Processes

Please refer to the batch processing guide for

Refresh Materialized View(s)

sdbp_materialized_view(job_in, plant_in); - Refreshes all existing materialized views owned by the schema_user defined in the given job.

To refresh a specified materialized view:

Modify (JOB_IN,PLANT_IN,MAT_VIEW_NAME_IN,REFRESH_TYPE) - Where:

a. JOB_IN - Job number generated in Job Manager.

b. PLANT_IN - Default plant.

c. MAT_VIEW_NAME_IN - Materialized view to be refreshed (e.g. SOLAP_ACT_COST_PLAN_EST).

d. REFRESH_TYPE_IN - Type of refresh to be done (F - Fast, C - Complete, A - Always perform complete, ? - Use default).

Example:

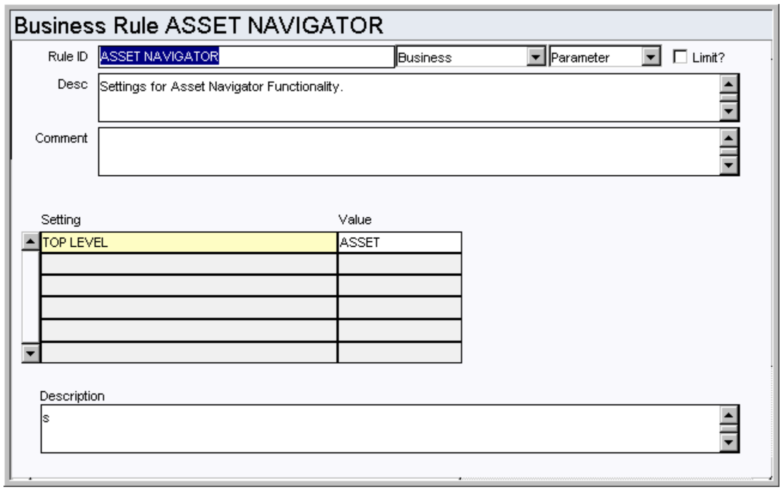
sdbp_materialized_view.refresh_materialized_view(966,'01','SOLAP_PLANNING_ACCURACY_IDX','C');

More information

Whenever an ordinary view's table is queried or updated, the DBMS converts these into queries or updates against the underlying base tables. A materialized view takes a different approach in which the query result is cached as a concrete table that may be updated from the original base tables from time to time. This enables much more efficient access, at the cost of some data being potentially out-of-date. If you, for some reason, need to have a materialized view refreshed at a different time than the regular schedule, you can modify the batch process to do so.

Business Rules

Asset Navigator Rule



Business Rule ASSET NAVIGATOR

Rule ID: ASSET NAVIGATOR | Business | Parameter | ☐ Limit?

Desc: Settings for Asset Navigator Functionality.

Comment:

Setting	Value
TOP LEVEL	ASSET

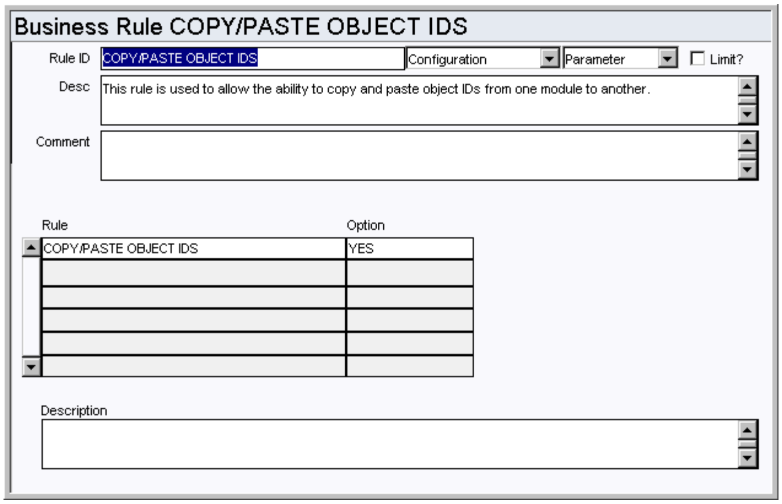
Description: s

This rule allows you to define whether the top level of the asset navigator hierarchy is ASSET (default) or DEPARTMENT.

Setting and Value

TOP LEVEL - Select either ASSET (default) or DEPARTMENT.

Copy/Paste Object IDs Rule



Business Rule COPY/PASTE OBJECT IDS

Rule ID: COPY/PASTE OBJECT IDS | Configuration | Parameter | ☐ Limit?

Desc: This rule is used to allow the ability to copy and paste object IDs from one module to another.

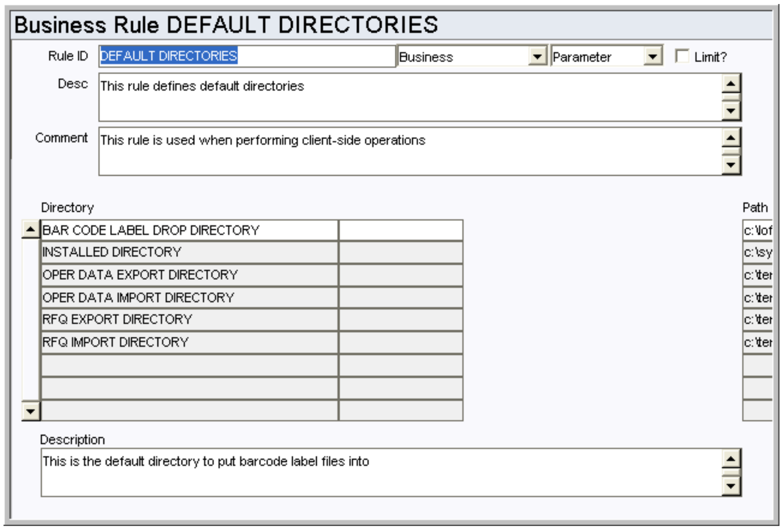
Comment:

Rule	Option
COPY/PASTE OBJECT IDS	YES

Description:

Set the Option value to YES or NO depending on whether you want to allow or disallow copying of object IDs from one module to another.

Default Directories Rule



Business Rule DEFAULT DIRECTORIES

Rule ID: DEFAULT DIRECTORIES | Business | Parameter | ☐ Limit?

Desc: This rule defines default directories

Comment: This rule is used when performing client-side operations

Directory		Path
BAR CODE LABEL DROP DIRECTORY		c:\of
INSTALLED DIRECTORY		c:\sy
OPER DATA EXPORT DIRECTORY		c:\ter
OPER DATA IMPORT DIRECTORY		c:\ter
RFQ EXPORT DIRECTORY		c:\ter
RFQ IMPORT DIRECTORY		c:\ter

Description: This is the default directory to put barcode label files into

The Default Directories rule defines default locations for files outside of the Oracle Utilities Work and Asset Management database and is used for saving or calling files from the client computer. Individual users can establish settings in their individual User Profile record in the Administration subsystem that will supersede these business rule settings.

The Default Directories rule should not be confused with the similar Default File Locations rule, which is used to define specific file names and the paths leading to them.

Directory

BAR CODE LABEL DROP DIRECTORY - default directory to put bar code label files into.

INSTALLED DIRECTORY - directory where the application files are located.

OPER DATA EXPORT DIRECTORY - default directory for exporting Operational Data files.

OPER DATA IMPORT DIRECTORY - default directory for importing Operational Data files.

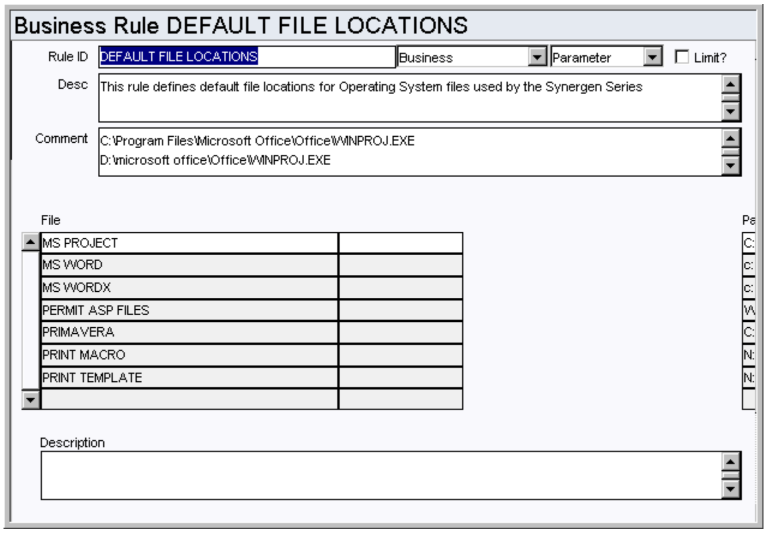
RFQ EXPORT DIRECTORY - default directory for exporting RFQ files.

RFQ IMPORT DIRECTORY - default directory for importing RFQ files.\

COMPONENT UPLOAD DIRECTORY - directory where files are stored when they are uploaded to support receiving multiple trackable components.

Path
This is the hard drive storage location for the corresponding file.

Default File Locations Rule



Business Rule DEFAULT FILE LOCATIONS

Rule ID: DEFAULT FILE LOCATIONS | Business | Parameter | ☐ Limit?

Desc: This rule defines default file locations for Operating System files used by the Synergen Series

Comment:
C:\Program Files\Microsoft Office\Office\WINPROJ.EXE
D:\microsoft office\Office\WINPROJ.EXE

File		Pa
MS PROJECT		C:
MS WORD		c:
MS WORDX		c:
PERMIT ASP FILES		W
PRIMAVERA		C:
PRINT MACRO		N:
PRINT TEMPLATE		N:

Description:

Define default file names and their locations for files outside of the Oracle Utilities Work and Asset Management database. The locations entered are used for saving or calling files from the client computer. Individual users can establish settings in their User Profile record in the Administration subsystem. User Profile settings supersede these business rule settings.

The Default File Locations rule should not be confused with the similar Default Directories business rule, which is used for defining paths leading to files with variable names.

File
List the default file names for operating system files used by Oracle Utilities Work and Asset Management.

MS PROJECT - This is the default file location where MS Project files will be stored.

MS WORD - This is the default file location where MS Word files will be stored.

PERMIT ASP FILES - This is the DNS or IP Address of the Webserver/Virtual Directory where ASP files, which are used in the printing of Blob attachments from the Permits module, are located. The path should be in the following format: Webserver/Virtual Directory.

PRIMAVERA - This is the default file location where Primavera files will be stored.

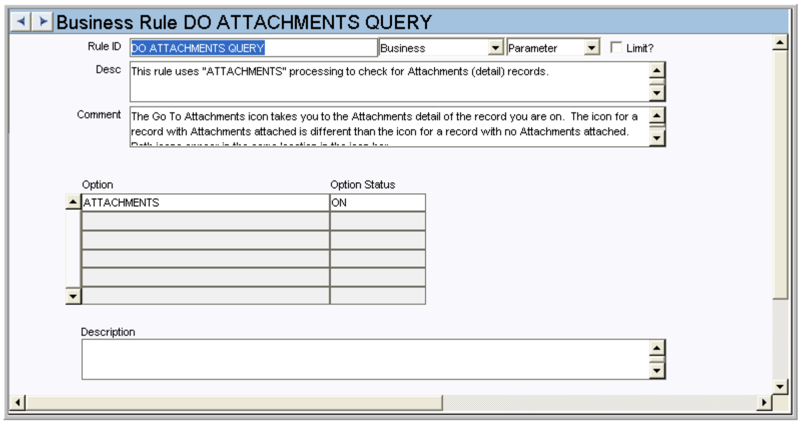
PRINT MACRO - Microsoft Word attachment-printing macro program path/filename.

PRINT TEMPLATE - Microsoft Word attachment-printing template path/filename.

Path

Enter the path and name for the corresponding file in this field. The maximum number of characters allowed for the path is 500.

Do Attachments Query



Business Rule DO ATTACHMENTS QUERY

Rule ID: DO ATTACHMENTS QUERY | Business | Parameter | ☐ Limit?

Desc: This rule uses "ATTACHMENTS" processing to check for Attachments (detail) records.

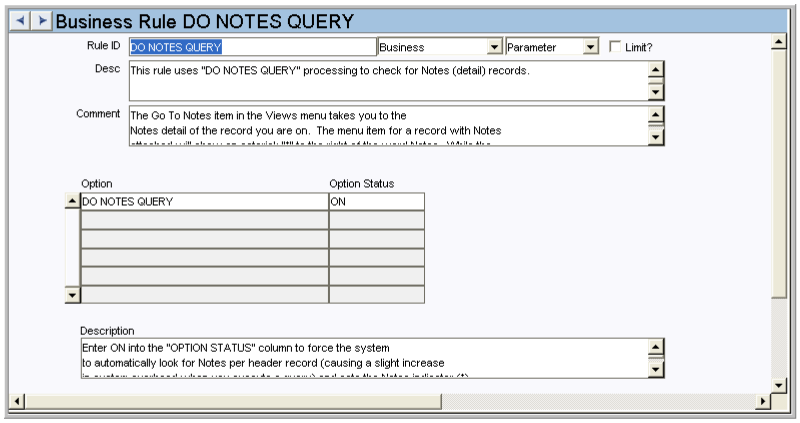
Comment: The Go To Attachments icon takes you to the Attachments detail of the record you are on. The icon for a record with Attachments attached is different than the icon for a record with no Attachments attached.

Option	Option Status
ATTACHMENTS	ON

Description:

If the Option Status is set to ON the system checks for attachments on records. If a record has attachments the system displays an asterisk next to the attachments link on the Views list in the module.

Do Notes Query



Business Rule DO NOTES QUERY

Rule ID: DO NOTES QUERY | Business | Parameter | ☐ Limit?

Desc: This rule uses "DO NOTES QUERY" processing to check for Notes (detail) records.

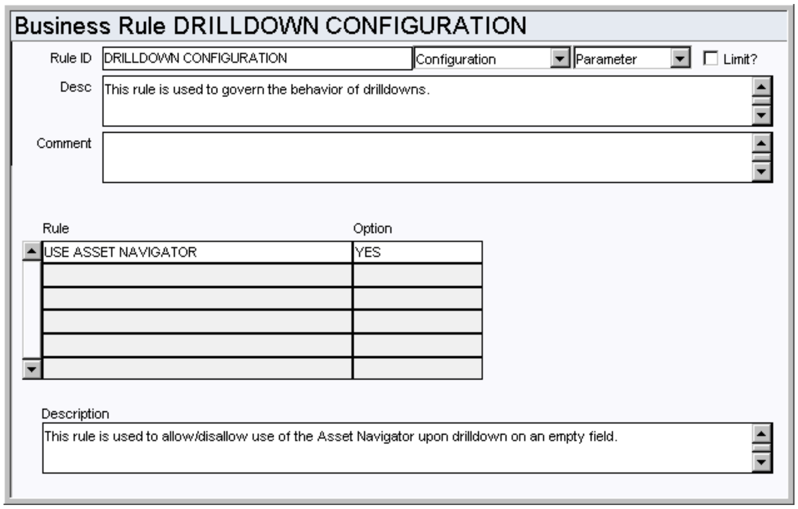
Comment: The Go To Notes item in the Views menu takes you to the
Notes detail of the record you are on. The menu item for a record with Notes

Option	Option Status
DO NOTES QUERY	ON

Description: Enter ON into the "OPTION STATUS" column to force the system
to automatically look for Notes per header record (causing a slight increase

If the Option Status is set to ON the system checks for notes on records. If a record has attachments the system displays an asterisk next to the notes link on the Views list in the module.

Drill-down Configuration Rule



Business Rule DRILLDOWN CONFIGURATION

Rule ID: DRILLDOWN CONFIGURATION | Configuration | Parameter | ☐ Limit?

Desc: This rule is used to govern the behavior of drilldowns.

Comment:

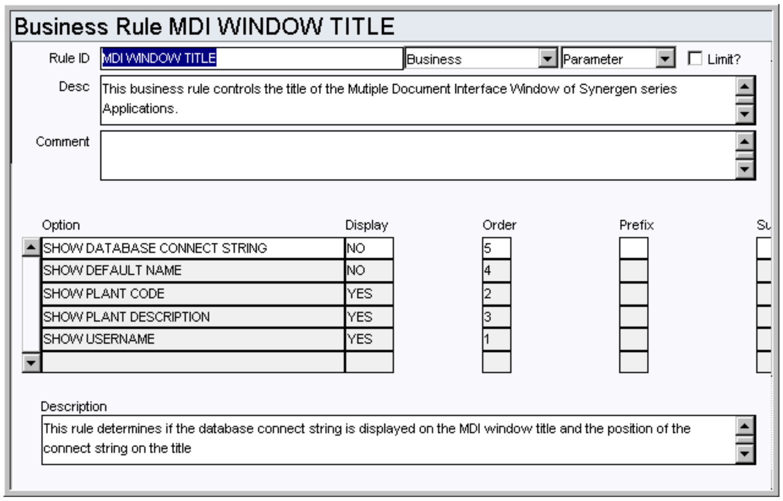
Rule	Option
USE ASSET NAVIGATOR	YES

Description: This rule is used to allow/disallow use of the Asset Navigator upon drilldown on an empty field.

Enable or disable the use of the Asset Navigator when performing drill-down from an Asset ID field in the application.

Set the USE ASSET NAVIGATOR rule key to YES if you want the system to open the Asset Navigator when you double-click on an Asset field. If this rule key is set to NO (default) the system opens the Asset module when you double-click on an empty Asset field.

MDI Window Title Rule



Business Rule MDI WINDOW TITLE

Rule ID: MDI WINDOW TITLE | Business | Parameter | ☐ Limit?

Desc: This business rule controls the title of the Mutiple Document Interface Window of Synergen series Applications.

Comment:

Option	Display	Order	Prefix	Su
SHOW DATABASE CONNECT STRING	NO	5		
SHOW DEFAULT NAME	NO	4		
SHOW PLANT CODE	YES	2		
SHOW PLANT DESCRIPTION	YES	3		
SHOW USERNAME	YES	1		

Description: This rule determines if the database connect string is displayed on the MDI window title and the position of the connect string on the title

Control the title of the Multiple Document Interface window. This rule determines whether or not the database connect string is displayed on the MDI window title and the position of the connect string on the title.

Option, Display, Order, Prefix, and Suffix

Enter YES or NO for each option in the Display column for each Option. Enter a sequence number for each option in the Order column to indicate the order in which each option should appear. You can also enter a Prefix or Suffix in the corresponding column for each option.

SHOW DATABASE CONNECT STRING - Determine whether the database name is displayed on the MDI window title and the position of the connect string on the title.

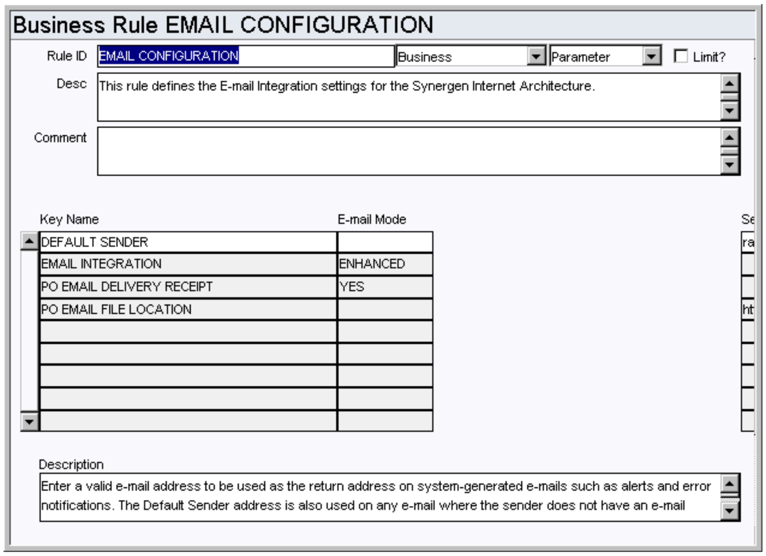
SHOW DEFAULT NAME - Determine whether the user's default name is displayed on the MDI window title and the position of the default name on the title.

SHOW PLANT CODE - Determine whether the Plant Code is displayed on the MDI window title and the position of Plant Code on the title.

SHOW PLANT DESCRIPTION - Determine whether the Plant Description is displayed on the MDI window title and the position of the Plant Description on the title.

SHOW USERNAME - Determine whether the Oracle Username is displayed on the MDI window title and the position of the Username on the title.

E-Mail Configuration Rule



Business Rule EMAIL CONFIGURATION

Rule ID: EMAIL CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule defines the E-mail Integration settings for the Synergen Internet Architecture.

Comment:

Key Name	E-mail Mode	Se
DEFAULT SENDER		ra
EMAIL INTEGRATION	ENHANCED	
PO EMAIL DELIVERY RECEIPT	YES	
PO EMAIL FILE LOCATION		ht

Description: Enter a valid e-mail address to be used as the return address on system-generated e-mails such as alerts and error notifications. The Default Sender address is also used on any e-mail where the sender does not have an e-mail

Define information specific to how the system processes e-mail, including the type of technology to use. You may need to enlarge the window or scroll to the right to see the Settings column.

Key Name and E-mail Mode

BC EMAIL DELIVERY RECEIPT - This key determines whether a delivery receipt should be sent to the user when he or she e-mails a blanket contract to a vendor.

BC EMAIL FILE LOCATION - Enter the location where the blanket contract e-mail file will be created in the Setting column.

DEFAULT SENDER - Enter a valid e-mail address to be used as the return address on system-generated e-mails such as alerts and error notifications. It is very important that default sender address be one that system administrators will receive, in case users need to respond to a system message.

The Default Sender address is also used or any e-mail where the sender does not have an e-mail address in his or her User Profile.

E-MAIL INTEGRATION - This key was previously used to choose the type of e-mail integration to be used in the system. The only current settings are ENHANCED or NONE. When the rule is set to NONE, users will only receive messages in their Oracle Utilities Work and Asset Management Inbox.

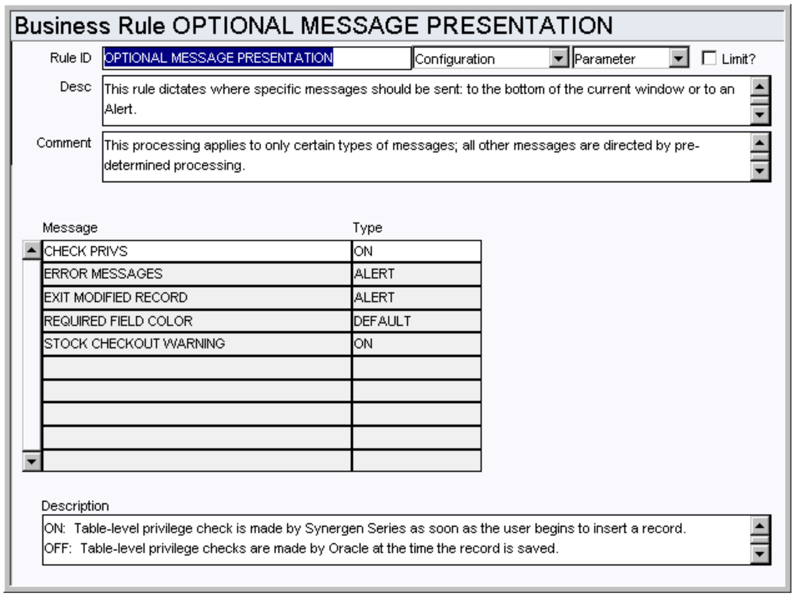
PO E-MAIL DELIVERY RECEIPT - Currently Delivery Receipt only works for messages delivered within the system. If the recipient receives a message in e-mail that was delivered from within the system, you will not receive a confirmation message when the message is opened.

PO E-MAIL FILE LOCATION - It defines the file location where the PO e-mail file will be generated. Enter the location where the PO e-mail file will be created in the Setting column.

You must also allow network access to the directory defined under the REPORTS OUTPUT PHYS DIRECTORY rule key in the Web Configuration Business Rule. Once this access is allowed, identify this network share in this rule key.

NOTE: SIA's email integration uses SMTP relaying to send email messages. If your email server restricts these relay requests, then emails sent to people who do not have an account on the email server may not go through. The email administrator must turn on SMTP relaying for the SIA Application server. This is usually done by specifying the IP address of the requesting server (SIA Application server) to the Email server.

Optional Message Presentation Rule



Business Rule OPTIONAL MESSAGE PRESENTATION

Rule ID: OPTIONAL MESSAGE PRESENTATION | Configuration | Parameter | ☐ Limit?

Desc: This rule dictates where specific messages should be sent: to the bottom of the current window or to an Alert.

Comment: This processing applies to only certain types of messages; all other messages are directed by pre-determined processing.

Message	Type
CHECK PRIVS	ON
ERROR MESSAGES	ALERT
EXIT MODIFIED RECORD	ALERT
REQUIRED FIELD COLOR	DEFAULT
STOCK CHECKOUT WARNING	ON

Description:
ON: Table-level privilege check is made by Synergen Series as soon as the user begins to insert a record.
OFF: Table-level privilege checks are made by Oracle at the time the record is saved.

There are many events and functions that generate messages sent to the user. With the Optional Message Presentation Rule you can dictate where certain message types should be sent: to the bottom of the current window or to an Alert window opened on top of the current window. Note that this processing applies to only certain types of messages (listed in the “MESSAGE” column); all other messages are directed by pre-determined processing.

Also controlled through this Rule is table-level privilege checking performed by system processing. Standard Oracle database processing performs table-level privilege checks only when a user attempts to execute a function. That is, a user wants to insert a new record, fills out all of the information on the form, then attempts to save. At that point, Oracle checks to see if that user has insert ability on the table. If not, the user is given an error message and cannot save his work.

Privilege check processing reviews user privileges at the earliest possible time and then issues a message to the user indicating that they do not have the required privilege. In the same example, when the user presses the insert button, the system checks privileges and then issues a message if the user does not have the privilege. This processing involves a bit more overhead than simply letting Oracle check privileges at the time of execution but is far more user-friendly.

This Rule also defines the coloring of required fields.

Message and Type

CHECK PRIVS - If the Type field is set to ON for this rule key the system verifies a user's table-level privilege as soon as he or she begins to insert a record. If this rule key is set to OFF all table-level privilege checks are made by Oracle at the time the record is saved.

ERROR MESSAGES - Set this rule key to MESSAGE in the to have an oracle error message displayed at the bottom of the window. Set it to ALERT to show a pop up box with the Oracle Error Message. Users can configure their user profile to set individual preferences for this option.

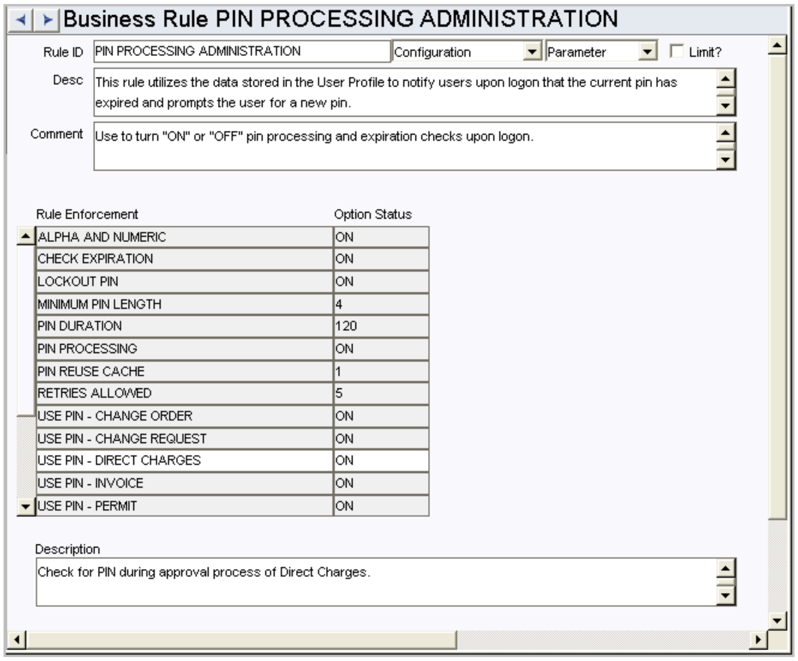
EXIT MODIFIED RECORD - Set this rule key to MESSAGE in the Type field to have this type of message displayed at the bottom of the window. Set it to ALERT to show a pop up box with the message. This applies to the warning message that a user sees when he or she attempts to leave a modified record without saving or undoing the change.

REQUIRED FIELD COLOR - Set this rule key to indicate the color that the system highlights required fields. Options are DEFAULT or 16 COLOR. Required field color can be changed for individuals in the User Profile module. The 16 COLOR setting should be used if users have problems with required fields not showing up with colored backgrounds. DEFAULT is entered in this column for those users running PC's with 256 colors (or greater).

Users can configure their user profile to set individual preferences for this option.

STOCK CHECKOUT WARNING - Enter ON in the Type column for the system to display a message that the issue quantity on the work order checkout request is greater than the estimated quantity on the Work Order Task Material Requirements. This message does not prevent the checkout; it is merely a warning. Enter OFF to prevent the message.

PIN Processing Administration Rule



Rule ID: PIN PROCESSING ADMINISTRATION | Configuration | Parameter | ☐ Limit?

Desc: This rule utilizes the data stored in the User Profile to notify users upon logon that the current pin has expired and prompts the user for a new pin.

Comment: Use to turn "ON" or "OFF" pin processing and expiration checks upon logon.

Rule Enforcement	Option Status
ALPHA AND NUMERIC	ON
CHECK EXPIRATION	ON
LOCKOUT PIN	ON
MINIMUM PIN LENGTH	4
PIN DURATION	120
PIN PROCESSING	ON
PIN REUSE CACHE	1
RETRIES ALLOWED	5
USE PIN - CHANGE ORDER	ON
USE PIN - CHANGE REQUEST	ON
USE PIN - DIRECT CHARGES	ON
USE PIN - INVOICE	ON
USE PIN - PERMIT	ON

Description: Check for PIN during approval process of Direct Charges.

The PIN Processing Administration Rule manages PIN functionality throughout the system including using data stored in the User Profile module to notify approvers at logon if their personal identification number has expired.

ALPHA AND NUMERIC - When this parameter is set to ON, personal identification numbers must contain both alpha and numeric characters.

CHECK EXPIRATION - Set this rule key to ON to invoke PIN expiration checking. When an approver logs onto the system, the system checks their PIN against the expiration date stored in the User Profile module.

If the Option Status column is set to OFF, the system will not check the expiration date and will not prompt for a new PIN once the current PIN expires.

LOCKOUT PIN - If this option is set ON, the system disables a PIN after the number of failed attempts to enter the PIN specified in the Retries Allowed parameter. Once a PIN is locked, Administrative intervention is required to activate.

MINIMUM PIN LENGTH - The minimum number of characters required for all personal identification numbers.

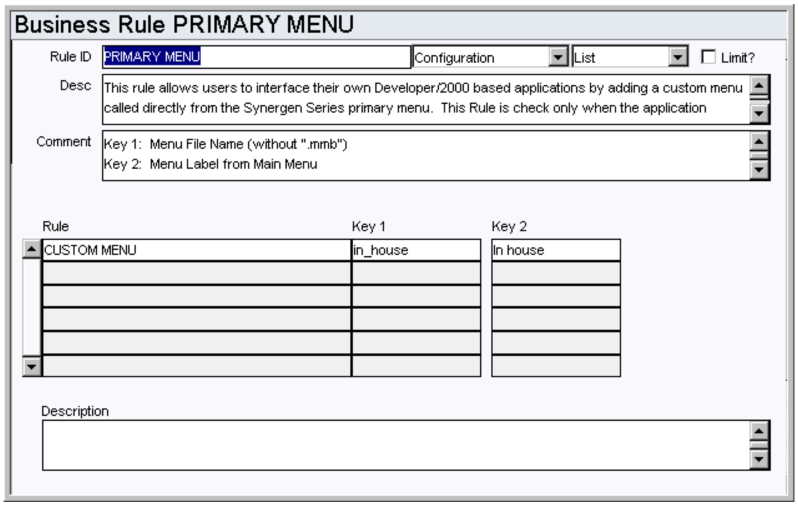
PIN DURATION - The number of days personal identification numbers can be used by approvers before they expire.

PIN REUSE CACHE - This parameter stipulates the size of the cache of PINs to maintain to ensure a PIN is not reused. If set to five, for example, a user cannot enter a new PIN that is the same as any of the user's five previous PINs.

RETRIES ALLOWED - This parameter specifies the number of incorrect attempts a user is allowed before their PIN is disabled.

Use PIN - [Module] - Set this value to ON to have the system check for PIN during the approval process for the specified module.

Primary Menu Rule



Business Rule PRIMARY MENU

Rule ID: PRIMARY MENU | Configuration | List | ☐ Limit?

Desc: This rule allows users to interface their own Developer/2000 based applications by adding a custom menu called directly from the Synergen Series primary menu. This Rule is check only when the application

Comment: Key 1: Menu File Name (without ".mmb")
Key 2: Menu Label from Main Menu

Rule	Key 1	Key 2
CUSTOM MENU	in_house	In house

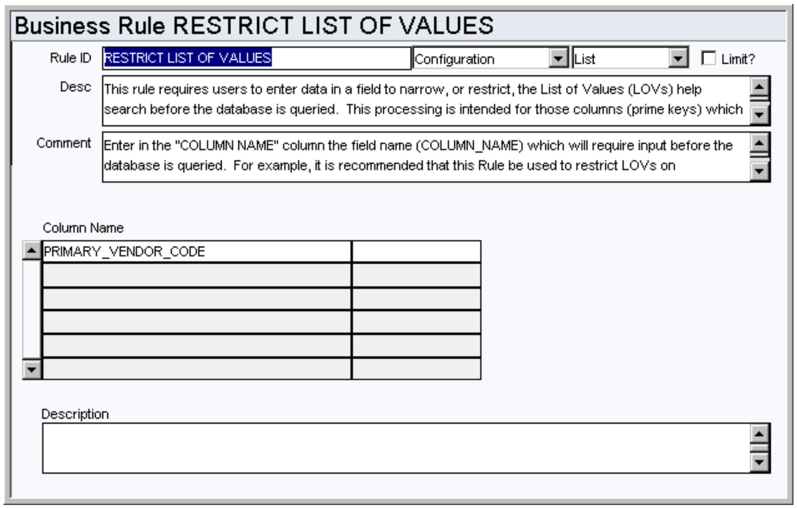
Description

Determine whether or not users can interface their own Developer/2000 based applications by adding a custom menu called directly from the primary menu. This rule is checked only when the application starts up. The menu option will appear as the first option of the Admin menu in the Primary Menu.

Rule, Key 1, & Key 2

CUSTOM MENU is the menu which contains a sample PL/SQL menu set up to call your own form. Key 1 is the form name of the menu (without the file extension .mmb). An example would be MY_MENU. Key 2 is the label that will appear in the application.

Restrict List of Values Rule



Business Rule RESTRICT LIST OF VALUES

Rule ID: RESTRICT LIST OF VALUES | Configuration | List | ☐ Limit?

Desc: This rule requires users to enter data in a field to narrow, or restrict, the List of Values (LOVs) help search before the database is queried. This processing is intended for those columns (prime keys) which

Comment: Enter in the "COLUMN NAME" column the field name (COLUMN_NAME) which will require input before the database is queried. For example, it is recommended that this Rule be used to restrict LOVs on

Column Name	
PRIMARY_VENDOR_CODE	

Description

Determine whether or not users are required to enter partial data into the fields listed here to narrow or restrict the list of values for these fields.

This processing is intended regulate searches on columns that will return a very large a number of records and cause a considerable system delay if all records were to be retrieved at once.

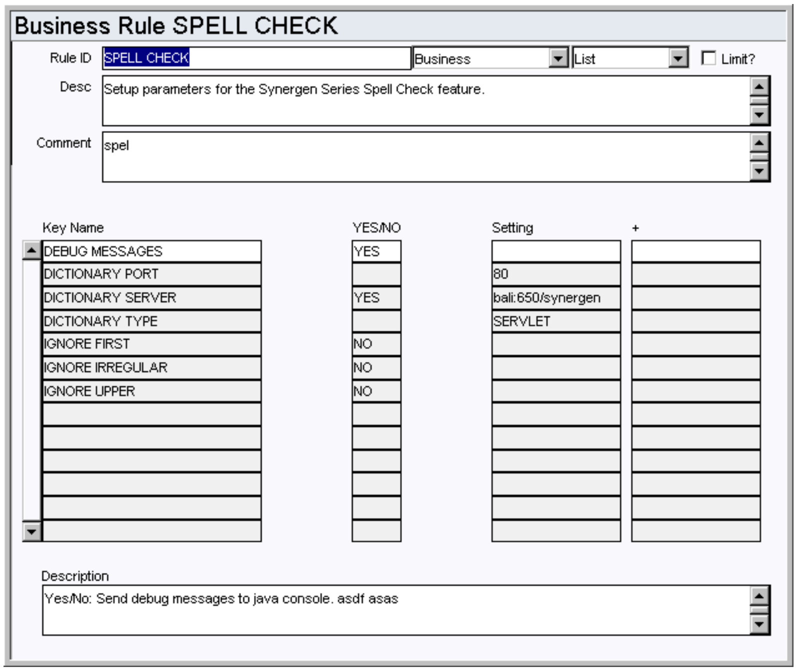
Column Name

Enter the field name for the field that will require input before the database is queried.

For example, it is recommended that this Rule be used to restrict Lists of Values on STOCK_CODE, ASSET_ID and VENDOR_CODE. This Rule is not recommended to be used to restrict Lists of Values on code table driven fields.

Warning: There is a limit to the number of fields for which Restricted List of Value Processing can be implemented. If too many fields are listed, the later fields will be ignored. The limit to the number of fields is based upon the length of the global variable (255 characters in length) into which the field names are appended. Therefore, the total number of characters (including spaces between field names) cannot exceed the 255-character limit.

Spell Check Rule



Business Rule SPELL CHECK

Rule ID: SPELL CHECK | Business | List | ☐ Limit?

Desc: Setup parameters for the Synergen Series Spell Check feature.

Comment: spel

Key Name	YES/NO	Setting	+
DEBUG MESSAGES	YES		
DICTIONARY PORT		80	
DICTIONARY SERVER	YES	bali:650/synergen	
DICTIONARY TYPE		SERVLET	
IGNORE FIRST	NO		
IGNORE IRREGULAR	NO		
IGNORE UPPER	NO		

Description: Yes/No: Send debug messages to java console. asdf asas

Configure parameters for the Spell Check feature.

Key Name, Option, and Setting

DEBUG MESSAGES - Set this option to YES to send debug messages to the java console.

DICTIONARY PORT - Set the port where the dictionary is located.

DICTIONARY SERVER - Set the server where the dictionary is located. The location must be specified by server name and port, separated by a colon (example: paris:650). DO NOT include “http://” before this value or add a folder name after the server name and port.

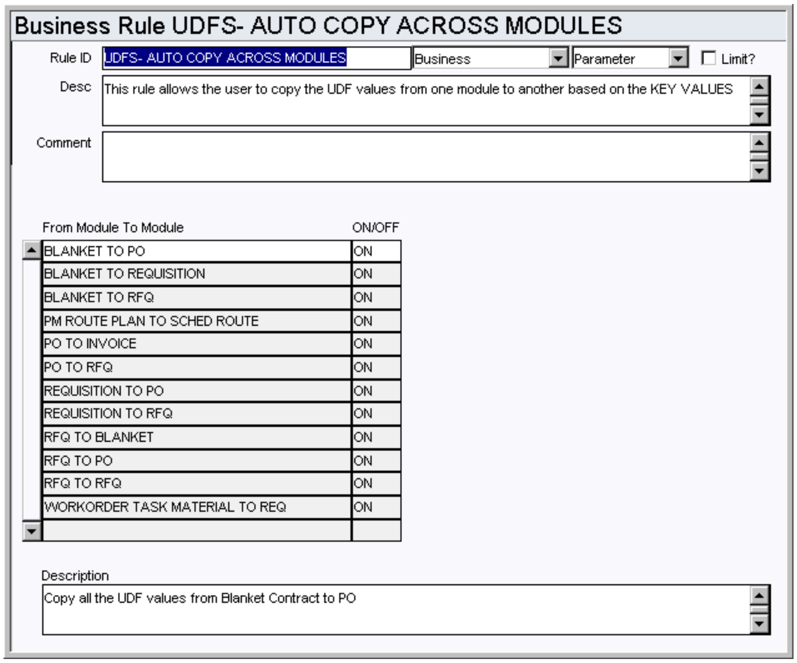
DICTIONARY TYPE - Set the type of dictionary.

IGNORE FIRST - Set this option to YES if you want to ignore irregular capitalization on the first word.

IGNORE IRREGULAR - Set this option to YES to ignore irregular words.

IGNORE UPPER - Set this option to YES to ignore words in all caps.

UDFs - Auto Copy Across Modules Rule



Business Rule UDFS- AUTO COPY ACROSS MODULES

Rule ID: UDFS- AUTO COPY ACROSS MODULES | Business | Parameter | ☐ Limit?

Desc: This rule allows the user to copy the UDF values from one module to another based on the KEY VALUES

Comment:

From Module To Module	ON/OFF
BLANKET TO PO	ON
BLANKET TO REQUISITION	ON
BLANKET TO RFQ	ON
PM ROUTE PLAN TO SCHED ROUTE	ON
PO TO INVOICE	ON
PO TO RFQ	ON
REQUISITION TO PO	ON
REQUISITION TO RFQ	ON
RFQ TO BLANKET	ON
RFQ TO PO	ON
RFQ TO RFQ	ON
WORKORDER TASK MATERIAL TO REQ	ON

Description: Copy all the UDF values from Blanket Contract to PO

Define settings so that users can copy UDF values from one module to another. Select the Module to Module combination and enter ON or OFF depending on whether or not you want to allow users to copy all of the UDF values from the first module to the second module indicated.

Copying User-Defined Field Information between Modules

For many modules, information from all user-defined fields on one window can be copied to all the corresponding user-defined fields in a different module.

Module combinations include:

Benchmark Work Order to Work Order

Blanket Contract to Purchase Order

Blanket Contract to Request for Quotes

Fleet Benchmark Work Order to Fleet Work Order

Purchase Order to Invoice

Purchase Order to Request for Quotes

Request for Quotes to Blanket Contract

Request for Quotes to Purchase Order

Requisition to Purchase Order

Requisition to Request for Quotes

Work Order Task Materials to Requisition

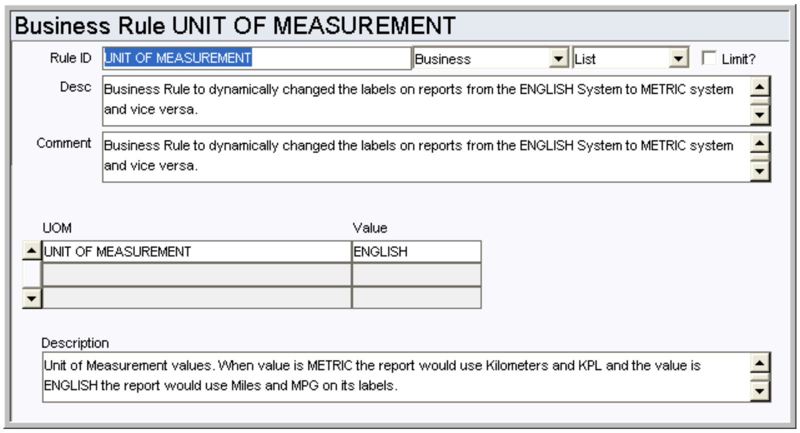
The copied information goes from one Attribute column in the first table to the corresponding Attribute column in the second table, so you must make sure that the sending and receiving columns correspond (e.g. Attribute1 on table one and Attribute1 on table two). The user-defined field labels do not have an impact on this processing.

For example, if you create a user-defined field labeled ‘X’ on the Requisition table using the Attribute1 column, and a second user-defined field labeled 'X' on the Purchase Order table using the Attribute2 column, the information will not copy over to 'X' on the Purchase Order. Instead, it will copy to the Attribute1 column of the Purchase Order table – which may not have an associated user-defined field at all.

How to Copy User-Defined Fields Information Between Modules

1. **Open the UDFS - Auto Copy Across Modules Business Rule**
2. **Find the appropriate From Module to Module option.**
3. **Set the associated ON/Off field to ON.**
4. **Click Save.**

Unit of Measurement Rule



Business Rule UNIT OF MEASUREMENT

Rule ID: UNIT OF MEASUREMENT | Business | List | ☐ Limit?

Desc: Business Rule to dynamically changed the labels on reports from the ENGLISH System to METRIC system and vice versa.

Comment: Business Rule to dynamically changed the labels on reports from the ENGLISH System to METRIC system and vice versa.

UOM	Value
UNIT OF MEASUREMENT	ENGLISH

Description: Unit of Measurement values. When value is METRIC the report would use Kilometers and KPL and the value is ENGLISH the report would use Miles and MPG on its labels.

This rule allows users to set whether to use the English or Metric system in labels on reports S_RPT075, S_RPT076, S_RPT077. Setting the rule key to METRIC causes the system to display kilometers and KPL and setting it to ENGLISH causes the system to display miles and MPG.

Code Tables

The following code tables include values that are used for fields in that are used in several modules and views throughout the system. They should be configured to reflect your business practices.

Code Table 54: Note Types

Note Type field - Most of the modules, and many of the detail windows, in the system have a Notes view that allows you to enter and maintain notes or comments about the record. Enter valid note types for your organization in Code Table 54. For example, you may want to include a Buyer type to apply for purchasing records, or a Safety type to apply to work orders.

All Notes views look alike, function in the same way, and include the same types from Code Table 54 throughout the system. When a record has an associated note the word Notes on the Views list will have an asterisk next to it.

Code Table 186: Manufacturers

Manufacturer field - Most modules in the system include a Manufacturer Data view where you can indicate the Manufacturer and part number's associated to the record. Use Code Table 186 to define any manufacturers that might be associated with any of your organization's assets, stock items, included on bills of materials, or otherwise used.

Event Queue

The system manages a queue of requests, such as emails or charts, which need to be processed in the Event Queue module.

Clearing Events

Select Clear Events at the bottom of the screen to purge the completed and failed events from the queue. The system will not delete events that are still pending.

Processing Retries

Within the config.properties file, the "queue_retries" property defines the number of times an event request that has errored during processing will be reattempted. Events in "retry" status will be processed when the server is restarted or when a Job Manager job has been scheduled to perform this action.

Set a Batch Job to Process Retries

Open the Job Manager module and create a new batch job with the following command entered in the Procedure field:

```
declare
response varchar2(2000);
begin
response
:=utl_http.request('process_queue_url?type=retry')
end;
```

The **process_queue_url** is the URL found in the process_queue_url column of the SA_INTERNET_INTEGRATION record that applies to the Oracle Utilities Work and Asset Management server.

Example:

```
utl_http.request('http://spl-london.us.oracle.com:7779/
DV19X/synergen/EventServlet?type=retry')
```

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

DISABLE CUSTOM SQL

This function excludes users from being able to use Custom SQL on search screens throughout the system. The best way to assign this function is by adding the users to a special Responsibility called "Disable Custom SQL" instead of adding the function to a regular responsibility profile.

1. **Open the Responsibility module.**
2. **Search for the Responsibility named "DISABLE CUSTOM SQL".**

   This special responsibility was delivered with the release and is designed to only include the function needed to disable Custom SQL.

3. **Select the Assigned Users view.**

4. **Add the user to the list.**

Entity Relationship Viewer

Controls access to the Entity Relationship Viewer accessed from the home page Actions list.

GIS Viewer

Grants the ability to use the Oracle GIS Viewer as the GIS viewer and enables access to the GIS Viewer accessed from the home page Actions list.

Graph Viewer

Controls access to the Graph Viewer accessed from the home page Actions list.

Issue Uncompiled Objects Msg

Determines which users see the uncompiled object message on the main module.

News Administration

Defines which users are authorized to administer home page News Links.

Reorder Wizard

Allows users to have access to the Reorder Wizard from the home page Actions list.

Installation Parameters

The installation program for new installs and upgrades prompts the administrator to choose settings for these parameters, however, if it becomes necessary to modify these parameters, you can make changes in the Installation Parameters module.

AUDIT LOG- Objects beginning with SAUT

ON/OFF

These objects control whether or not the indicated module is tracked in the system audit log module. The value controls whether the trigger is enabled or disabled.

ENABLE PASSWORD RESET

When set to ON the "Forgot Password" link is present on the login screen and users can click this link to have a temporary password emailed to the email address in their user profile. Please refer to the password reset topic in the Installation Parameters chapter for more information.

PHONE_NUMBER_FORMAT

Ex. (XXX) XXX-XXXX

This is the phone number format used by the SIA application. Example: a raw value of 9259357670 with a format mask of XXX-XXX-XXXX would result in a displayable phone number of 925-935-7670.

For non-english installations, the code should be set to NO FORMAT.

SPELL CHECK

ON/OFF

This option controls the Spell Checking feature.

Transaction Logs - Objects beginning with SDBT

ON/OFF

Most of them trigger a transaction to populate a log, although some trigger other events. The value controls whether the trigger is enabled or disabled.

Database Administration

The following sections include database administration information that may help to improve system functionality

E-Mail Integration

In 11g databases, there is additional security that is configured by default to be turned ON. This security does not allow access out of the database without a script being run to enable this access.

Run the following line at an sqlplus prompt to verify whether the security access is stopping email integration from working:

select utl_http.request('http://www.proligence.com') from dual;

If this sql fails (example below) the security is still turned ON:

```
ERROR at line 1:
ORA-29273: HTTP request failed
ORA-06512: at "SYS.UTL_HTTP", line 1577
ORA-12535: TNS:operation timed out
ORA-06512: at line 1
```

Run the script, 7426686.sql (included in the 1.8.0.2 patch), to configure the 11g database to allow external network services to be accessed by the Oracle Utilities Work and Asset Management application similar to the default security privilege in the 10g or 9i database.

Note: The script will only work in an Oracle 11g database.

Enhanced Security

The 11g database can be installed with enhanced security, but this option should not be installed. The Oracle Utilities Work and Asset Management application does not support the mixed case/lower case characters required for enhanced security.

If enhanced security was installed, you will need to manually turn off case sensitive support for passwords:

Disable Case Sensitive Support for Passwords

1. **cmd> sqlplus synergen/pwd@wamprod.**

```
SQL> SHOW PARAMETER SEC_CASE_SENSITIVE_LOGON
```

2. **Modify the value to FALSE.**

```
SQL> ALTER SYSTEM SET SEC_CASE_SENSITIVE_LOGON = FALSE;
```

3. **Modify SYNERGEN password as a mixed case.**

```
SQL> alter user SYNERGEN identified by Asdf; //mixed case, the new
password is 'Asdf'
```

Changing the Password

alter user synergen identified by password;

Checking the Settings

select profile, resource_name, limit from dba_profiles where resource_type='PASSWORD' order by profile;

Failed Logon Attempts

Use the failed_logon_attempts property to set the number of tries each user has before being locked out of the system. Please note, that for each logon attempt, system processing appears to log-on 2 or 3 times. Given this, if you want users to have 5 attempts, the failed logon attempts property should be set to at least 15 or higher to account for system processing which also log as attempts. Run the following to alter the database setting:

Set maximum number of retries to log in:

1. **cmd> sqlplus synergen/pwd@wamprod.**

```
SQL> SHOW PARAMETER FAILED_LOGIN_ATTEMPTS
```

2. **Set the maximum number of retries.**

```
SQL> alter profile default limit FAILED_LOGIN_ATTEMPTS 30;
```

Unlocking an Account:

```
alter user synergen account unlock;
```

Managing Log Files

OAS includes data logging to track functioning of the system. By default, Oracle Utilities Work and Asset Management uses this logging to track errors and/or debugging information. Log files grow in size taking up system resources and cannot be changed or deleted unless the server instance is stopped. Follow the steps below to set the system so that the log files can be deleted without stopping the server. To do this you will specify a rolling log file of specific sizes so that the resulting log files are more manageable.

To enable the log file rotation:

1. **Stop the Oracle AS instance.**

   If your Oracle AS version is 10.1.3.0.0 or higher, go directly to step 3. (Oracle AS 10.1.3.0.0 already has the log file rotation functionality, no patch is needed to be applied to this version.)

2. **Apply Patch 4489980 to the Oracle AS instance.**

3. **Modify the java-options of the target OC4J instance to add the following:**

   -Dstdstream.filesize=2.5

   -Dstdstream.filenumber=5

   (the above setting will make the files rotate if they hit 2.5MB and will only keep 5 files - the oldest one gets deleted).

4. **Modify the OC4J-options of the target OC4J instance to add the following:**

   -out $ORACLE_HOME\opmn\logs\std.out

   -err $ORACLE_HOME\opmn\logs\std.err

   (where $ORACLE_HOME is the directory for your AS installation.)

5. **Start the Oracle AS instance.**

   (the log files will be created in

   $ORACLE_HOME\opmn\logs\<oc4j instance>_<island name>_<jvm id>

   The java options and oc4j options mentioned above will end up in the opmn.xml file.

The following shows an example:

```
<process-type id="OC4J_DV19M" module-id="OC4J">
<module-data>
 <category id="start-parameters">
     <data id="java-options" value="-server -Xrs
-
Djava.security.policy=D:\ORAAS102\j2ee\OC4J_DV19M\config\java2.pol
icy
```

```
-Djava.awt.headless=true -Dstdstream.filesize=2.5 -
Dstdstream.filenumber=5"/>
     <data id="oc4j-options" value="-out
D:\ORAAS102\opmn\logs\DV19M_std.out -err
D:\ORAAS102\opmn\logs\DV19M_std.err"/>
 </category>
 <category id="stop-parameters">
     <data id="java-options"
value="-
Djava.security.policy=D:\ORAAS102\j2ee\OC4J_DV19M\config\java2.pol
icy
-Djava.awt.headless=true"/>
 </category>
</module-data>
<start timeout="900" retry="2"/>
<stop timeout="120"/>
<restart timeout="720" retry="2"/>
<port id="ajp" range="12501-12600"/>
<port id="rmi" range="12401-12500"/>
<port id="jms" range="12601-12700"/>
<process-set id="default_island" numprocs="1"/>
</process-type>
```

Security Certificate

To ensure that computers recognize the latest Oracle JAR security certificate, it may be necessary to clear the Java Plug-in cache and remove existing Trusted Certificates. The existing certificate will be identified as Oracle Corporation from VeriSign. This will force your system to read the new certificate and open the Java Plug-in Security Warning panel at the beginning of your next Forms session. You can then select the "Always trust content from this publisher." option on the Java Security Warning panel to use the new certificate in all future sessions.

To Clear the Java Plug-in Cache and Remove the Security Certificate

1. **Open the Windows Control Panel (start > settings > control panel).**
2. **Double click on the Java icon.**
3. **Select the "General" tab.**
4. **Click on the "Settings..." button.**
5. **Click the "Delete Files..." button.**
6. **Verify that the "Applications and Applets" option is selected.**
7. **Click the "OK" button.**
8. **Select the Security tab.**
9. **Click the "Certificates..." button.**
10. **If necessary, select the certificate issued to "Oracle Corporation", issued by "VeriSign" in the list of Trusted Certificates.**
11. **Click the Remove button.**
12. **Click the "OK" button.**
13. **Close the Windows Control Panel.**

Single Sign On

The application server can be configured to address the need to centralize authentication of different applications at a site. This “Single Sign-On” concept will allow users to logon to one system, and be granted access to other systems. Oracle Utilities Work and Asset

Management needs to be configured as an “external” application to manage the many parts of the user account that are based within the database.

Application Server Configuration

These configuration instructions apply to Oracle Application Server 10G Release 2.

1. **Access the SSO Server Administration pages**

   http:///server:port/pls/orasso

2. **Logon to the SSO Server. You must be a member of the OID Group "cn=iASAdmins".**

3. **Click the "SSO Server Administration" link.**

4. **Click the "Administer External Applications" link.**

5. **Click the "Add External Application" link.**

6. **Add "Utilities Work and Asset Management" as an External Application by entering the following information. ("server" is the server hosting the Work and Asset Management SIA server and "port" is the listening http port.)**

   Under External Application Logon

      a. Application Name: <the name of the application as you want it to appear on the link>

      b. Login URL: http://server:port/synergen/Home?tgt=Main

      c. User Name/ID Field Name: username

      d. Password Field Name: password

   Under Authentication Method

      a. use the "POST".

   The new external application link will now be available on the SSO screen.

Transaction Logs

The system records transaction information for many modules in Transaction Logs. Transaction Logs can provide a tracking tool that is useful in finding out when charges, status changes, or other changes to information in a particular module. You can also search for log entries for particular criteria such as changes made within a specified date range or by a specific user.

While Transaction Logs are not configurable, it is important that you know where to find this summary information for transactions that take place during your use of the system.

Transaction logs are display only. The information shown is drawn from the module indicated in the Help File topic Modules with Transaction Logs.

Available Transaction Logs

Account Log	Auditing Log	Blanket Contract Log
Checkout Request Log	Component Log	Crew Activity Log
Direct Charges Log	Document Control Log	Inspection Log (Asset)
Job Manager Log	Keys and Locks Log	Payroll Log
Property Log	Purchasing Log	Receiving Log
Runtime Entry Log	Service Contract Timesheet Log	Storeroom Transaction Log
Timekeeping Log	Work Order Activity Log	

Charts, Metrics, and Reports

In order for users to have access to charts, filtered metrics, or reports they must have the object added in their responsibility profile. Consider how much of this information needs to be accessed by the user as you are developing your responsibility matrix, and assign responsibilities accordingly.

SAPI

The Application Programming Interface (SAPI) is used to customize Oracle Utilities Work and Asset Management Forms processing. An Oracle Forms library file called SAPI.PLL is included with the standard Oracle Utilities Work and Asset Management application and contains two Forms procedures:

- SAPI_PRODUCT_VERSION - used to keep track of changes to the library file.
- SAPI_TRIGGER - called by Oracle Utilities Work and Asset Management Forms standard processing to provide the ability to customize some Oracle Utilities Work and Asset Management processing.

SAPI_TRIGGER is called from a number of Oracle Utilities Work and Asset Management Form events. These are explained in the following table.

Triggers

The SAPI_TRIGGER procedure is called in each of the following forms events on every Form/ Block in the application:

Action	Trigger Name	Event	Special Parameters/ Comments
New record	POST-INSERT	Triggered after a new record is created.	Any kind of post-commit processing of an inserted record would go here.
New record	PRE-INSERT	Triggered before a new record is created.	Record validation code and field defaults would normally go here.
Update record	POST-UPDATE	Triggered after an update to a record.	Any kind of post-commit processing of an updated record would go here.
Update record	PRE-UPDATE	Triggered before an update to a record.	Record validation code and field defaults would normally go here

Action	Trigger Name	Event	Special Parameters/ Comments
Validation	WHEN-VALIDATE-ITEM	Triggered when a field has been changed.	Specialized field level validation would go here.
Form Initialization	PRE-FORM	First event triggered when a new forms starts up.	
Form Initialization	PRE-WHEN-NEW-FORM	Special Oracle Utilities Work and Asset Management event that is called before forms WHEN-NEW-FORM trigger.	Please contact support before using this event.
Form Initialization	WHEN-NEW-FORM	Triggered when a new form is opened. This is called after PRE-FORM.	
Key	KEY-DELREC	The "delete record" key is clicked.	
Key	KEY-NEXT-ITEM	The "next" button is clicked.	
Key	KEY-PREV-ITEM	The "previous" button is clicked.	
Key	KEY-CREREC	The "insert record" key is clicked.	
Key	KEY-COMMIT	The save icon is clicked.	
Navigation	WHEN-NEW-RECORD	Triggered when user navigates to a record.	
Navigation	WHEN-NEW-BLOCK	Triggered when a user navigates to a new block.	
Navigation	WHEN-NEW-ITEM-INSTANCE	Triggered when user navigates to a field.	
Navigation	POST-QUERY	After any block query, this trigger is fired to populate non-database fields	
Custom Menu Item	WHEN-CUSTOM-MENU-ACTION-<Action>	A custom menu action is selected.	"<Action>" is defined by text string entered in the "Action" field on the Module Custom Menus definition screen. See Custom Menus documentation for details.

Parameters

The parameters for SAPI_TRIGGER are listed below, together with some explanation of each. The "_IN" at the end of the parameter name means information coming in and the "_OUT" means data going to the calling event processor.

TRIGGER_NAME_IN: This is the name of the event trigger from the above list.

PLANT_IN: The current plant code that the user is logged into.

FORM_NAME_IN: Form name of the module (see Synergen Modules)

BLOCK_NAME_IN: Name of the block that the event occurred in.

TYPE_IN: Values are INSERT or UPDATE depending on the type of event trigger

GOTO_FIELD_OUT: This is used when the ERROR_MESSAGE_OUT is not null and it is desired to put the cursor on a particular field. Put the name of the field in this parameter.

TRACE_ACTIVITY_OUT: This text can be used to describe what actions are taking place for error handling. It will be displayed with the error information if an error occurs.

ERROR_MESSAGE_OUT: This text is set when an error has occurred. If this parameter is not null, then an error will be displayed and all processing for the event will stop.

Sample

A sample SAPI trigger is shown below. In this example, on the Work Order and Work Order Tasks forms, we want to add special processing on update of the header record status to FINISHED. If the UDF field 10 is filled in, we want to launch to a browser window to a special URL.

```
PROCEDURE SAPI_TRIGGER (
 trigger_name_in varchar2,
 plant_in varchar2,
 form_name_in varchar2,
 block_name_in varchar2,
 type_in varchar2,
 goto_field_out in out varchar2,
 trace_activity_out in out varchar2,
 error_message_out in out varchar2) IS
-- trigger_name_in varchar2(30) is the name of the trigger
-- plant_in varchar2(3) is the plant
-- form_name_in varchar2(8) is the name of the form
-- block_name_in varchar2(30) is the name of the block
-- type_in is 'INSERT' , 'UPDATE' etc depending on trigger
-- goto_field_out varchar2 (61) is used when the error_message_out
is
--  not null and it is desired to put cursor on this item
--  include block.item
-- trace_activity_out varchar2(100) is used to trace what is being
done
--  will be displayed with the error
-- error_message_out varchar2(200) is the error message
--  return null if everything is okay
--  if not null, then the trigger is not done and the
--  trace_activity_out and error_message_out are displayed
 v_old_status sa_work_order.work_status%type;
 v_current_status sa_work_order.work_status%type;
 v_url varchar2(2000);
BEGIN
 error_message_out := null;
 goto_field_out := null;

 if form_name_in in ('WORKORD', 'WOTASK') then
 if block_name_in in ('HEADER') then
  if trigger_name_in = 'PRE-UPDATE' then
 v_old_status :=
  get_item_property('header.work_status',DATABASE_VALUE);
 copy('header.work_status', v_current_status );
 if v_current_status = 'FINISHED' and
  v_old_status != v_current_status and
   name_in('header.attribute10') is not null then
    select sia_url||'/WebGateWay' into v_url from
sa_internet_integration where rownum = 1 order by timestamp;
 web.show_document(v_url );
 end if;
  end if;
  end if;
 end if;

exception
 when others then
  error_message_out := substr(sqlerrm,1,200);
END;
```

Batch Processing

This section describes general batch processes and business rules which affect overall system functionality.

A batch process is a task that the system runs automatically. Such tasks can include making updates, purging obsolete data, generating schedules, or performing other automatic functions established by your organization without user intervention. Batch processing uses computer resources efficiently and facilitates off-hour completion of time consuming tasks that can slow down the system.

Job Manager and Job Manager Log modules

Batch processes are stored as database packages and database procedures, and are managed from within the system through the Job Manager module. Each Job Manager record has a system-generated number that uniquely identifies the "job", or scheduled database procedure. The batch job can call one or more procedures to run at the specified run-time interval.

The Job Manager Log lists a complete set of messages issued by procedures as they were run. Each run of a procedure is uniquely identified by the Job Sequence Number, allowing you to research Job Manager Logs for one or many Procedures, and each run of a Procedure.

Batch Processes

Job Manager - sdbp_job_error_log ((job_in, plant_in, sysdate-365);
Generates entries in the Job Manager Log.

Purge Data - sdbp_purge_data;
Purges (deletes) data from the system database tables as defined in the Batch Purge Parameters Business Rule. Currently Alerts and Batch Messages are reviewed, deleting only those records that are older than the number of days defined in the rule for that item.

Run All Batch - sdbp_run_all_batch;
Calls all of the batch procedures defined in the Batch Job Control business rule. SDBP_RUN_ALL_BATCH generally includes all procedures that need to run on a daily basis. Procedures that need to run at different periodic intervals, such as once a year or at the end of the Pay Period should be scheduled separately.

How to Create a New Batch Job

Use this action to set batch jobs to run on an individual schedule when you don't want to include them in Run All Batch.

1. **Open the Job Manager module.**
2. **Select Create Job from the Actions list on the Search Options screen.**

   The Update Job Window opens.
3. **Enter Job information.**

   In the description field, enter the database package or procedure name (as stored in the database), followed by the Job Number (NN) displayed in the upper left corner of the window and the Plant Code ('PC') that you want this Job to process, followed by a semi-colon.

   Packages:PACKAGE . PROCEDURE_NAME (NN, 'PC');

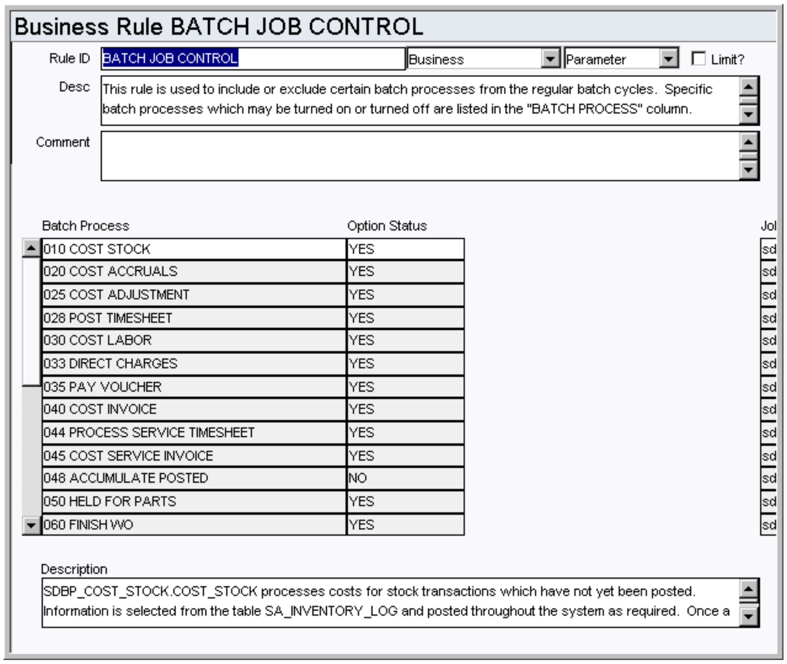
   Procedures:PROCEDURE_NAME (NN, 'PC');

You can then enter a time Interval for automatic cycling of the procedure and the Next Run Date (and time) that you want the procedure to begin cycling.

4. **Click the Save icon when you have entered all necessary information.**

Business Rules

Batch Job Control Rule



Business Rule BATCH JOB CONTROL

Rule ID: BATCH JOB CONTROL | Business | Parameter | ☐ Limit?

Desc: This rule is used to include or exclude certain batch processes from the regular batch cycles. Specific batch processes which may be turned on or turned off are listed in the "BATCH PROCESS" column.

Comment:

Batch Process	Option Status	Jol
010 COST STOCK	YES	sd
020 COST ACCRUALS	YES	sd
025 COST ADJUSTMENT	YES	sd
028 POST TIMESHEET	YES	sd
030 COST LABOR	YES	sd
033 DIRECT CHARGES	YES	sd
035 PAY VOUCHER	YES	sd
040 COST INVOICE	YES	sd
044 PROCESS SERVICE TIMESHEET	YES	sd
045 COST SERVICE INVOICE	YES	sd
048 ACCUMULATE POSTED	NO	sd
050 HELD FOR PARTS	YES	sd
060 FINISH WO	YES	sd

Description: SDBP_COST_STOCK.COST_STOCK processes costs for stock transactions which have not yet been posted. Information is selected from the table SA_INVENTORY_LOG and posted throughout the system as required. Once a

Include or exclude certain batch processes from regular batch cycles.

Batch Process, Job, and Option Status

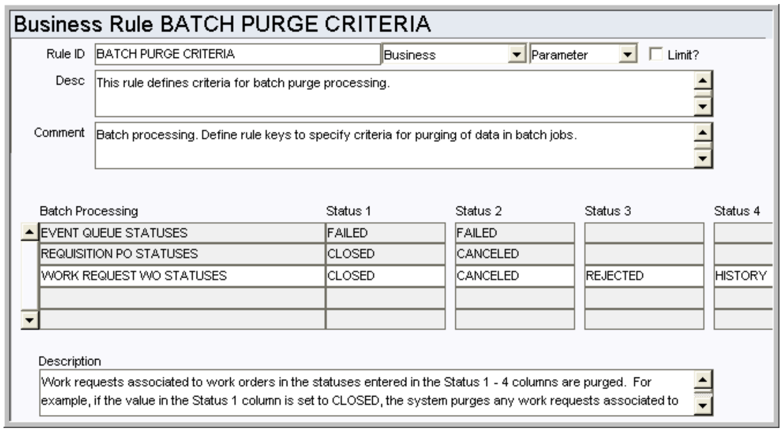
Specific batch processes that can be turned on or turned off are listed in the Batch Process column. All batch procedures listed and turned on will run as part of SDBP_RUN_ALL_BATCH in the order specified in the Batch Process column.

Enter YES in the Option Status column if you want the batch process to run regularly, and NO if you do not want it to run. The Job column identifies the stored database procedure associated to each batch process.

Note that the order in which batch procedures are run makes a difference since a batch procedure may be dependent upon the data processed in another batch procedure. If they are run out of order, you may not see the data (such as cost roll-ups) for the batch run until the next time batch procedures are run.

Please refer to the Batch Process Descriptions for specific information on each process.

Batch Purge Criteria Rule



Business Rule BATCH PURGE CRITERIA

Rule ID: BATCH PURGE CRITERIA | Business | Parameter | ☐ Limit?

Desc: This rule defines criteria for batch purge processing.

Comment: Batch processing. Define rule keys to specify criteria for purging of data in batch jobs.

Batch Processing	Status 1	Status 2	Status 3	Status 4
EVENT QUEUE STATUSES	FAILED	FAILED		
REQUISITION PO STATUSES	CLOSED	CANCELED		
WORK REQUEST WO STATUSES	CLOSED	CANCELED	REJECTED	HISTORY

Description: Work requests associated to work orders in the statuses entered in the Status 1 - 4 columns are purged. For example, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to

Define the status values which determine when to delete obsolete data. Records are deleted when batch purge processing runs. Enter the applicable statuses in the Status 1, Status 2, and Status 3 columns for each record type. For example, for work requests, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to work orders in CLOSED status.

Batch Processing

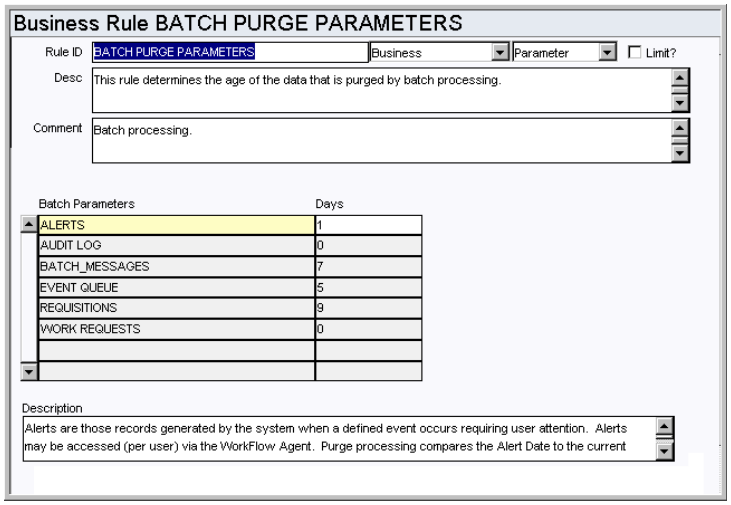
EVENT QUEUE STATUSES - Delete event queue entries that are in the statuses identified in the status columns.

REQUISITION PO STATUSES - Delete requisitions associated with purchase orders in the statuses identified in the status columns. Typically, Requisitions are considered unnecessary after the PO has been CLOSED or CANCELED.

WORK REQUEST WO STATUSES - Delete work requests associated to work orders that are in the statuses identified in the status columns. Recommended options for Status 1 - 4 include work orders in CLOSED, CANCELED, HISTORY, or REJECTED status. Although it is possible, it is NOT recommended that you purge work requests associated to work orders in PLANNING, PENDING APPROVAL, APPROVED, ACTIVE or FINISHED status.

STATUS 1, STATUS 2, STATUS 3 - These columns indicate the statuses for the records that are purged. Status 1 is the prime status to be deleted. Status 2 and 3 are other desired statuses.

Batch Purge Parameters Rule



Business Rule BATCH PURGE PARAMETERS

Rule ID: BATCH PURGE PARAMETERS | Business | Parameter | ☐ Limit?

Desc: This rule determines the age of the data that is purged by batch processing.

Comment: Batch processing.

Batch Parameters	Days
ALERTS	1
AUDIT LOG	0
BATCH_MESSAGES	7
EVENT QUEUE	5
REQUISITIONS	9
WORK REQUESTS	0

Description: Alerts are those records generated by the system when a defined event occurs requiring user attention. Alerts may be accessed (per user) via the WorkFlow Agent. Purge processing compares the Alert Date to the current

As system data ages, it often becomes of little or no value to users. Purging old data regularly prevents tables from growing too large and helps maintain a quick system response time when querying those tables.

The Batch Purge Parameters Rule defines, per specific type of data, the age of a record before batch processes purges it. Note that the specific routines called for purging are already defined, purging either a single record at a time or a header record and its associated view, whichever is appropriate.

Batch Parameters and Days

ALERTS - Set the number of days the system should retain Alerts on the home page. Purge processing compares the Alert Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

AUDIT LOG - Set the number of days the system should retain Audit Log entries. Purge processing compares the date that the entry was made to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

BATCH_MESSAGES - Messages generated by batch processing and are stored as records in the Job Manager module so that you can easily access and review them at any time. Purge processing compares the Batch Message Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

REQUISITIONS - Purge Processing compares the PO Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the Requisition is deleted from the system.

WORK REQUESTS - Purge Processing compares the Work Order Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the work request is deleted from the system.

Batch Process Descriptions

The following batch processes are configured in the Batch Job Control business rule, and can be set to run or not run when Run All Batch is triggered.

Account Distribution module	**ACCOUNT DISTRIBUTION TEMPLATE -** sdpb_defaults_accounts_status (job_in, plant_in);- You are able to set future start dates in the Account Templates module. This process runs today's start dates and sets those records to active on that day.
Service Timesheet Service Invoices	**ACCUMULATE POSTED SERVICE TIMESHEETS** - sdbp_process_service_timesheet.accumulate_posted (job_in, plant_in); - Generates Service Contract Invoice records and associated Invoice Line Items for each Service Contract Timesheet in posted status with the Auto Pay indicator checked.
Blanket Contract module	**AUTO ACTIVATE BLANKETS** - sdbp_blanket_services.auto_activate(job_in, plant_in); - Sets Blanket Contracts to Active status on the Initiation Date indicated on the Blanket Contracts.
Blanket contract module	**AUTO CLOSE BLANKETS** - sdbp_blanket_services.auto_close(job_in, plant_in); - Closes Active Blanket Contracts on the Expiration Date or the Extended Date indicated on the Blanket Contracts.
Employee module, Timekeeping module	**AUTO CREATE TIMESHEETS** - sdbp_auto_create_timesheet.main(job_in,plant_in); - Triggers functionality where the system automatically creates timesheet records for employees as designated on their Employee record. The system can be configured to automatically create timesheets for employees who work a fixed schedule by checking the Automatically Create Timesheet? Indicator in the Auto Timesheet Schedule view in the Employee module.
AMMO Only	**CHECK LOT EXPIRATION -** sdbp_check_lot_expiration(job_in, plant_in); (only used with the Advanced Material Management Option) - Places all Lot IDs with expired dates older than the system date on Expired Hold.
AMMO only	**CHECK PICK QUEUE -** sdbp_check_pick_queue(job_in, plant_in); - (only used with the Advanced Material Management Option) - Recalculates pick queue status for checkout requests.
Receiving, Multi-Step Receiving, and Purchase Order modules	**CHECK RECEIVED PO ITEM** - sdbp_chk_issd_po_item - Sends an alert to the PO Item Requestor if the PO is fully received. This procedure looks for all issued PO records. For each PO line item with the field Receipts-Fully Received = Y, an Alert will be sent to the Requestor via the home page inbox. If the Requestor is invalid or null, a message will go to the job manager. The field Sent Alert Indicator on the PO Item is set to Y after an Alert/Job Log Message is sent. The Alert will only be sent once.
Approval Portal	**CLEAR EVENT QUEUE** - sdbp_event_queue.clear_events(job_in, plant_in); - Clears Event Queue records based on the setting of the Event Queue rule key in the Batch Purge Parameters Business Rule.
Work Order module	**CLOSE WORK ORDER** - sdbp_close_work_orders(job_in, plant_in); - Closes work orders in Finished status after the number of days specified in the WO Aging Business Rule.
Receiving and Multi-Step Receiving modules	**COST ACCRUALS** - sdbp_cost_accruals.cost_accruals(job_in, plant_in); - Accrues costs for receiving transactions that have not yet been posted. Information is selected from the table SA_RECEIVING_LOG and posted throughout the system as required.
Cost Adjustment module	**COST ADJUSTMENT** - sdbp_cost_adjustment(job_in, plant_in) - Processes adjustments costs that have not yet been posted.
Timekeeping, Direct Charges, and Service Request modules	**COST AND CLOSEOUT** - smu_interface.sdbp_mu_interface(job_in, plant_in,'N'); - Processes transactions entered in cost and closeout.

Asset, Work Order Task modules	**COST ASSET** - sdbp_cost_asset.cost_asset (job_in, plant_in) - Allocates costs to assets indicated on the Asset list in the Work Order Task module by creating cost adjustment records and posting accordingly. This functionality is only applicable when the Allocate Costs to Asset option in the Work Order Processing business rule is set to ON. You must either set the job run option to YES in the Batch Job Control business rule or set up an individual batch schedule for it to run automatically. The cost adjustment is not created until the work order is in closed status, so this should run after the close work order process. Please refer to the instructions under the Job Manager module for more information. One reason that you may not want to include this process in the general run all batch schedule is that your business process does not require that it run on as frequent or infrequent schedule as the jobs managed by Batch Job Control.
Invoicing module	**COST INVOICE** - sdbp_cost_invoice.cost_invoice(job_in, plant_in); - Processes costs for purchase Invoices, selecting approved Invoices and posting costs throughout the system as required. Once an Invoice is successfully processed, it is marked as posted.
Work Order Task module	**COST LABOR** - sdbp_cost_labor.cost_labor(job_in, plant_in); - Processes approved labor costs (from timesheets) that have not yet been posted. Costs are posted to the work order task as a Labor record. If a Labor Requirement record does not yet already exist for the task, the system inserts one, then posts the cost. Once a labor charge is successfully processed, it is marked as posted.
Service Invoice module	**COST SERVICE INVOICE** - sdbp_cost_service_invoice.cost_service_invoice(job_in, plant_in); - Processes costs for service contract Invoices, selecting approved Invoices and posting costs throughout the system as required.
Service Request module	**COST SERVICE REQUEST** - sdbp_cost_service_request.cost_service_request_rollup (job_in, plant_in); - Posts closed service request assets to the cost asset table.
Storeroom module	**COST STOCK** - sdbp_cost_stock.cost_stock(job_in, plant_in); - Processes costs for stock transactions that have not yet been posted. Information is selected from the table SA_INVENTORY_LOG and posted throughout the system as required. Once a stock cost transaction is successfully processed, it is marked as posted.
Bill of Material, Master Catalog, and Asset modules	**CREATE BOM DETAILS** - sdbp_create_bom_details.create_bom_details(job_in, plant_in); - Provides an automated means of updating existing bill of materials with new stock codes based on other operations occurring in the system. Stock Code is added to the BOM ID related to Asset ID/Component ID information selected from SA_INVENTORY_LOG and SA_RECEIVING_LOG tables. Once a log record is successfully processed, it is marked as complete.
Asset, Fleet Asset modules	**DEPRECIATE ASSETS** - sdbp_end_period_depreciation(job_in, plant_in); Depreciation costs are posted by batch according to settings in the Asset Depreciation Business Rule.
Direct Charges module	**DIRECT CHARGES** - sdbp_direct_charges.direct_charges(job_in, plant_in); - Processes approved Direct Charges costs which have not yet been posted, and creates new entries in the Direct Charges Log.
Storeroom module	**END PERIOD DEPRECIATION**- sdbp_end_period_depreciation(job_in, plant_in)(job_in, plant_in); - This will post Depreciation Costs according to settings in the Asset Depreciation Business Rule.
Work Order and Work Order Task modules	**FINISH WO** - sdbp_finish_wo(job_in, plant_in); - Updates the work order header status to Finished if either all associated tasks are in Closed, Canceled, or Finished status, or if the work order has no associated tasks.

Regulatory Accounting module	**FIXED ASSET VALUATION** - sdbp_work_order.fixed_asset(job_in, plant_in); - Processes actual amounts and allocation amounts for a work order task and applies them to the Regulatory Accounts associated to the compatible units on the task. Also determines the value of fixed assets associated to the capital regulatory accounts on the work order tasks. This procedure also includes the package that creates change requests for the creation or retirement of group assets on a work order task.
Home Page	**GENERATE ALL CHART IMAGES** - sdbp_generate_all_chart_images (job_in, plant_in); - Generates chart images used on home page. . Run Now is not an option on the Actions list for this batch process. If you want to regenerate the thumbnail chart image on the spot, open the Charts Administration module, locate the chart on the list, and click the Regenerate Image button.
Work Order and Work Order Task modules	**HELD FOR PARTS** - sdbp_held_for_parts(job_in, plant_in); - Reviews work order task parts requirements vs. stock inventory and direct purchases for a task. If the On-Hand quantity in a storeroom is less than the amount required for an active task or if direct purchase items ordered for a task are still not received, the Held for Parts indicator on the task is checked. If all parts required (storeroom and direct purchase) are available, the Held for Parts indicator is unchecked.
Invoicing, Receiving, and Multi-Step Receiving modules	**INVOICE RESOLUTION** - sdbp_invoice-resolution(job_in, plant_in); - Uses the Invoice Setup Criteria Business Rule for determining whether mismatched invoice processing is allowed, and tries to resolve mismatched invoices to PO receiving.
Leave Request and Timekeeping modules	**LEAVE REQUEST** - sdbp_post_leave(job_in, plant_in); - Posts Leave Requests and creates timesheets for approved Leave Requests that have the Create Timesheet indicator checked and are in an open Pay Period.
Home Page	**METRIC HANDLER** - sdbp_metric_handler (job_in, plant_in); - Processes all metrics to get current data.
Payroll Voucher module	**PAYROLL VOUCHER** - sdbp_pay_voucher.pay_voucher(job_in, plant_in); - Processes approved payroll vouchers which have not yet been posted. Once a payroll voucher is successfully processed, it is marked as posted.
Pm Master, Work Order, and Benchmark modules	**PM CYCLE** - sdbp_pm_cycle_job.start_job(job_in, plant_in); - Reviews active PM Masters and cycles those that are due, creating work orders in the status defined in the PM Master Parameters business rule. If the PM is being cycled and the Benchmark's component is no longer installed on the Benchmark's asset, the system will generate a work order with the asset from the Benchmark and will not bring over the component.
PM Master and Work Order modules	**PM FINISH** - sdbp_pm_finish(job_in, plant_in); - Processes PM Master information for those PMs where the associated work order has been set to Finished status. This includes entering the work completion date, inserting a new Forecast record (to maintain the correct number of future Cycles), and setting any skipped Forecast dates to Canceled status. The Next Schedule Date is recalculated (for Calendar Interval PMs) and is placed on the PM Master record.
Schedule PM Route, PM Route, and PM Master modules	**PM ROUTING** - sdbp_pm_routing(job_in, plant_in); - Updates PM Stops based upon the Completed Dates entered on a Scheduled PM Route List. Next Schedule Dates are then adjusted as required and the PM Route Stop item is set to Posted.
Purchase Order module	**PO CLOSEOUT** - sdbp_po_closeout(job_in, plant_in); - Reviews Purchase Orders, setting the header status to Received, Fully , Invoice, Fully , or Closed as appropriate. Before a Purchase Order is set to Closed status, it must remain in Invoiced, Fully status for the number of days defined in the PO Aging Business Rule.
Timekeeping module	**POST TIMESHEET** - sdbp_post_timesheets.post_time(job_in, plant_in); - Posts timesheet information such as Comp Time, Leave, Regular Time, etc. for Pay Periods and recalculates the leave time balance. Once a Timesheet has posted for the Pay Period, the payroll status is set to Closed.

	PROCESS FIXED ASSETS - sdbp_work_order.fixed_asset (job_in, plant_in); - Processes actual amounts and allocation amounts for a work order task and applies them to the Regulatory Accounts associated to the compatible units on the task. Also determines the value of fixed assets associated to the capital regulatory accounts on the work order tasks. This procedure also includes the package that creates change requests for the creation or retirement of group assets on a work order task.
Service Timesheet, Work Order, and Work Order Task modules	**PROCESS SERVICE TIMESHEET (APPROVED TIME)**- sdbp_process_service_timesheet.post_approved_time(job_in, plant_in); - Processes approved labor costs (from service timesheets) that have not yet been posted. Costs are posted to the work order task as a Labor record. If a Labor Requirement record does not yet already exist for the task, the system inserts one, then posts the cost. Once a labor charge is successfully processed, it is marked as posted.
Project/Subproject module	**PROJECT ALERT** - sdbp_project_alert.alert_job(job_in, plant_in); - Uses the Project Budget Options Business Rule for determining if a percent and/or dollar tolerance is to be used. The estimated and committed subprojects costs are compared to the budget amount minus the tolerance. An alert is sent to the subproject supervisor_name and to the project project_manager when these costs are above the target amount.
System-wide	**PURGE DATA** - sdbp_purge_data(job_in, plant_in); - Purges (deletes) data from database tables as defined in the Batch Purge Parameters Business Rule. Currently Alerts and Batch Messages are reviewed, deleting only those records that are older than the number of days defined in the rule for that item.
Requisition and Purchase Order modules	**PURGE REQUISITIONS** - sdbp_purge_requisitions.purge_req(job_in, plant_in); - Enable or disable a batch job to purge Requisitions in PO Created status where the PO is in a certain status. The status and age are defined in the Batch Purge Parameters and Batch Purge Criteria Business Rules.
Work Order, Work Order History modules	**PURGE WORK ORDER** - sdbp_purge_work_order.purge_wo(job_in, plant_in); - Selects the work orders that have been in Closed status for the number of days as defined in the Work Order Aging Rule, then copies them into the Work Order History tables. Each selected work order is reviewed to see how much information is to be moved to the History tables (defined in the Work Order Closeout detail). Asset History information is also inserted. Once a work order is successfully processed, the work order is deleted from the work order tables.
Work Request and Work Order modules	**PURGE WORK REQUESTS** - sdbp_purge_work_requests.purge_wr(job_in, plant_in); - Allows you to explicitly enable or disable a batch job to purge work requests in WORK ORDER status where the work order is in a certain status. Status and age are defined in the Batch Purge Parameters and Batch Purge Criteria Business Rules.
Regulatory Account module	**REGULATORY ACCOUNT COST** - sdbp_regulatory_account_cost (job_in, plant_in) - Posts costs associated to regulatory accounts.
Work Order Task and Scheduling modules	**RESCHEDULE WORK**- sdbp_reschedule.job_reschedule(job_in, plant_in); - Reviews all active work order tasks which are unfinished and places them on the Daily and / or Weekly Schedules as defined in the Auto Generate Daily Schedule and Auto Generate Weekly Schedule Rules. Work Order which were just generated by PM Master processing will also be placed on the Daily / Weekly Schedule.
Storeroom, Work Order Task, and Work Order modules	**RESET DEMAND QUANTITY** - sdbp_storeroom_demand(job_in, plant_in); - Recalculates the On-Demand Quantity for parts within the storeroom. This procedure reviews all active work order tasks, summing the quantities required across tasks for stock items. Once recalculated, the On-Demand Quantity for each storeroom item is updated accordingly. Note that this batch procedure is not a required procedure since standard processing maintains the storeroom On-Demand Quantity. This serves as an extra level of assurance that the On-Demand Quantities are correct as of each nightly batch run. Note that running this process could potentially be time consuming if there is a large amount of data for the system to process.

Storeroom module

RESET ON ORDER QUANTITY - sdbp_storeroom_on_order (job_in, plant_in); - Resets the quantity for storeroom parts that are on order. This procedure is triggered when a PO is canceled.

Storeroom and Reorder Review modules

STOCK REORDER - sdbp_stock_reoder.stock_reorder(job_in, plant_in); - Reviews all storeroom items, selecting those that are set up for automatic reorder and processes those items that have reached their reorder point. This process uses settings in the Batch Stock Reorder Business Rule to calculate the quantity to reorder. The basic calculation is:

reorder_quantity = maximum_quantity - (inventory_quantity + in receipt quantity + on_order_quantity + reorder_quantity + repair_quantity)

You can set a custom batch process to run SDBP_STOCK_REORDER on a specific storeroom by entering that storeroom in the job parameters.

User-Profile module

SYNCHRONIZE USER - sdbp_clean_user_n_user_profile (job_in, plant_in); - Synchronizes records in SA_USER and SA_USER_PROFILE by inserting missing user records for matching user profiles, setting a default plant if not specified, and deleting user records without matching user profiles.

Warranty, Warranty Claim modules

WARRANTY EXPIRATION ALERTS - sdbp_process_warranty_alerts(job_in, plant_in); - Sends alerts to the person indicated on the Warranty when the warranty expires.

Regulatory Accounting and Account modules

YEAR END OH DISTRIBUTION - sdbp_year_end_oh_cost_dist (job_in, plant_in); - Provides the ability to allocate costs from overhead regulatory accounts to the appropriate capital, maintenance and/or operations regulatory accounts at year-end.

To Run Stock Reorder Batch Processing for a Specific Storeroom

1. **Open the Job Manager Search Options screen.**
2. **Select Create Job from the Actions list.**
3. **Enter the Storeroom in the job parameters.**

   For example: SDBP_STOCK_REORDER.STOCK_REORDER (9,'01', 'WH1'); where 9 is the job number, '01' is the plant and 'WH1' is the storeroom.
4. **Click the Save icon.**

   Doing this does not exclude the storeroom from the standard job that is completed with Run All Batch.

UPDATE TEMPLATE STATUS - sdbp_update_template_status(job_in, plant_in); - Not Active.

Vendor, Multi-Step Receiving, and Purchase Order modules

VENDOR PERFORMANCE - sdbp_vendor_performance.vendor_performance(job_in, plant_in); - Supports the gathering of Vendor Performance statistics. This procedure performs the following:

- Identifies the processing parameters for the Current Rating Period for Active Vendors.
- Updates Quality Performance data based on changes since the last batch run.
- Updates Delivery Performance data for new transactions.
- Updates Quality Performance data for new transactions.

Regulatory Accounting

YEAR END OVERHEAD DISTRIBUTION - sdbp_year_end_oh_cost_dist(job_in, plant_in) Allocates costs from Overhead Regulatory Accounts to related non-overhead accounts (Capital, Maintenance, Operations, Work In Progress) based on Overhead Class.

Additional Batch Jobs Not Included in Business Rule

Invoicing module	**AUTOMATIC INVOICING** - sdbp_ers_invoicing(job_in, plant_in); - Generates invoices based on records that are set for automatic invoicing.
Cost Adjustment, Work Order Task, and PM Route modules	**COST ADJUSTMENT FOR PM ROUTE** - sdbp_cost_route.cost_route(job_in, plant_in); - Generates and posts cost adjustments to remove charges from the work order task account and distribute them among the PM Route's assets. Labor and material costs related to accomplishing the Scheduled PM Route are charged against the work order's task and then distributed amongst the assets that were finished on the PM Route.
Maintenance module	**CREATE NEW LEAVE YEAR** - sdbp_create_new_leave_year.new_leave_year(job_in, plant_in); - Inserts leave records once per year for all employee records into the Employee Leave detail, carrying over remaining leave information from the previous year.
System-wide	**END OF PERIOD PROCESSING** - sdbp_end_of_period_processing(job_in, plant_in); - Processes storeroom data at the end of each accounting period, populating the Storeroom Usage table and resetting the Storeroom Month-to-Date (MTD) Usage quantity to zero.
Home Page	**GENERATE CHARTS** - sdbp_generate_chart_image (job_in, chart_id_in, plant_in) - Generates specific chart images. For the chart identifier, this procedure uses only the number following "s_cht" in the chart name (for example, 140 is the chart_id for chart s_cht140). . Run Now is not an option on the Actions list for this batch process. If you want to regenerate the thumbnail chart image on the spot, open the Charts Administration module, locate the chart on the list, and click the Regenerate Image button.
Job Manager Log module	**JOB MANAGER** - sdbp_job_error_log ((job_in, plant_in, sysdate-365); - Generates entries in the Job Manager Log.
Requisition module	**REQUISITION TEMPLATE STATUS CHECK** - sdbp_req_template_status_chk(job_in, plant_in); - Changes the status of requisition templates to inactive when they reach the expiration date.
System-wide	**RUN ALL BATCH** - sdbp_run_all_batch(job_in, plant_in); - Calls all of the batch procedures defined in the Batch Job Control Business Rule. SDBP_RUN_ALL_BATCH generally includes all procedures that need to run on a daily basis. Procedures that need to run at different periodic intervals, such as once a year or at the end of the Pay Period should be scheduled separately. The order in which batch procedures are run makes a difference since a batch procedure may be dependent upon the data processed in another batch procedure. If they are run out of order, you may not see the data (such as cost roll-ups) for the batch run until the next time batch procedures are run.
Storeroom and Material Disposition modules	**STOREROOM REPAIR COSTS** - sdbp_storeroom_repair_costs(job_in, plant_in); - Sums costs based on the material and account log for material that has been dispositioned from closed work orders.

Reports

S_RPT097 - Job Manager Log Report

The report is designed to show the Job Manager Log detail log for the Job Manager. The report always uses the plant that is associated with the user.

Installation Parameters

BATCH JOB DEBUG MODE
ON/OFF

This parameter determines whether the dbms_activity will be appended to the messages in the Job Manager Log. The dbms_activity will not be appended if the value is set to OFF. A value of ON will do otherwise.

Approval Limit Module

Create and manage Approval Titles in the Approval Limit module. Approval Titles are used throughout the system to determine who can give approval for various kinds of documents (in the form of records). Examples of these documents include Purchase Orders, Requisitions, Work Orders, Work Requests, etc. In order to be able to approve a given type of document, the user must be assigned the appropriate approval title.

Users can have more than one Approval Title and any Approval Title can have more than one kind of document that it's users can approve as well as more than one user. Approval Titles also have a monetary limit for each document. For example user A, the Maintenance Department swing-shift supervisor, might have an Approval Title for all maintenance documents, and be able to authorize work requests up to five hundred thousand dollars, but only be able to approve work orders for one hundred thousand dollars or less.

Approval Titles can be combined to form Approval Routing Lists to manage the approval process when several individuals or departments must review records before final approval is granted.

> Refer to the index under the "Approvals" topic to see where special considerations are needed for various modules and functionality.

Fields

Approval Title and Description

The Approval Title field indicates the code that is selected from the Next Approver field or the Approval Route field on records that require approval. Create Titles that are meaningful for the job function responsible for approving the records that will be designated under the Document type.

Type

Indicates the type of records that can be approved by this Approval Title. Type can be set to:

- **M** - for Maintenance Approver titles
- **P** - for Production Approver titles
- **B** - if the title serves for both Maintenance and Production Approver titles.

Employee Number and Username

The Employee Number field contains the Employee Number of the person being assigned the Approval Title. The field has an associated List of Values that is controlled by the Employee module in the Resource subsystem. When you supply the Employee Number, the system supplies the Username.

Alert?

If the Alert? box is checked the system sends an alert to the user when a document of the appropriate type and value needs to be reviewed or approved. By leaving the box blank, you can have a user be able to approve documents but not be alerted on a daily basis.

Active?

A check in the Active? Check box indicates that the Approval Title is active for that user. This allows you to easily deal with situations where a user periodically acts as a replacement in the absence of another user; the first user can be given all of the second user's Approval Titles and the titles need only be activated when the second user is away.

Document and Limit

The Document list indicates which record types the Approval Title can approve, while the associated limit represents the maximum monetary value of the record that can be approved.

Copy Record

APPROVAL - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Modules and Activities Requiring an Approval Title

The list of documents is controlled by system Code Table 184. This code table can not be modified. Approval Titles should be configured for each of the following modules (provided the module will be used in your business operations):

ADJUST - Cost Adjustment
CHNGASSET - Change Request - Asset
CHNGCATLG - Change Request, Catalog
CHNGGEN - Change Request - Generic
CHNGSTORRM - Change Request, Storeroom
CHNGVEND - Change Request, Vendor
CO - Change Orders
CONTIME - Service Contract Timesheet
DC - Direct Charges
INVC - Invoice
LEAVEREQ - Leave Request
ODCLOG - Direct Charges Log
PERMIT - Permits
PO - Purchase Order
PROC - Procedures
PROJECT - Project
REQSTN - Requisition
RFQ - Request for Quotes
SERVREQ - Service Request
TIME - Timesheets
WO - Work Orders
WOASSIGN - Work Order Task Assignment (obsolete)
WODESIGN - Work Design
WRKREQ - Work Requests

Approval Titles should also be configured to approve any of the following activities that will be necessary in your organization:

AVOVERRIDE - Approved Vendor Override
DISCRPACT - Discrepancy Activity (obsolete)
DISCRPOWN - Discrepancy Owner (obsolete)
INSPECTION - Inspection Owner (obsolete)
MATLPLAN - Material Planner (obsolete)
PHYSWZRD - Physical Inventory Wizard
TIMEWZRD - Timesheet Wizard

Routing List Module

Routing Lists work in conjunction with Approval Titles, which are managed in the Approval Limit module. Approval Titles are used throughout the system to determine who can give approval for various kinds of documents (in the form of records). Currently, Routing Lists only apply to Requisitions, Purchase Orders, Change Orders, Change Requests and Work Order Material Detail Direct Purchases.

Fields

Title

The Approval Title from the Approval Limits module.

Description

The Approval Title description from the Approval Limits module.

Sequence

The sequence that the Approval Title occupies in the route.

Mandatory

Checked, this box indicates that the Approval Title cannot be skipped. If an Approver disagrees with an item sent through Approval Routing, this stops the process.

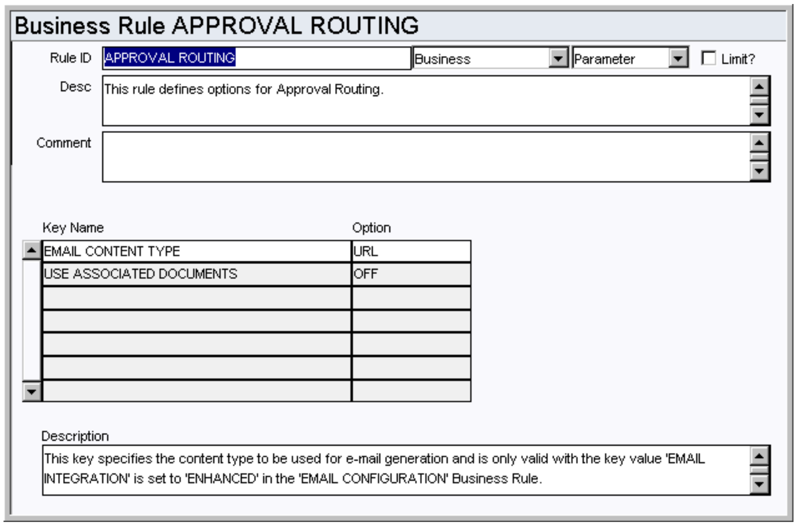
Notify Only

Checked, this box indicates that the Approval Title will merely get an Alert to agree or disagree and this Approval Title can be skipped. If an Approver disagrees with an item sent through Approval Routing, this will not stop the process.

If both the Mandatory and Notify Only fields are left unchecked, the approver listed will receive an alert, but his or her response will not affect the approval route.

Business Rules

Approval Routing Rule



Business Rule APPROVAL ROUTING

Rule ID: APPROVAL ROUTING | Business | Parameter | ☐ Limit?

Desc: This rule defines options for Approval Routing.

Comment:

Key Name	Option
EMAIL CONTENT TYPE	URL
USE ASSOCIATED DOCUMENTS	OFF

Description: This key specifies the content type to be used for e-mail generation and is only valid with the key value 'EMAIL INTEGRATION' is set to 'ENHANCED' in the 'EMAIL CONFIGURATION' Business Rule.

Determine how the system routes Alerts for documents requiring approval.

Key Name and Option

APPROVAL ALERT NAVIGATION - When this rule key is set to WIZARD, clicking on an alert opens an approval wizard to guide you through the approval process. If the rule key is set to RECORD, clicking on an approval alert opens the record. Note: Alerts will open according to how this rule key was set when the alert was generated. For example, if users have existing alerts and you change the setting from RECORD to WIZARD, those existing alerts will still open the record, but alerts created after the rule key change will open the wizard.

EMAIL CONTENT TYPE - This key specifies the type of e-mail content allowed when e-mails are sent from Oracle Utilities Work and Asset Management to a regular e-mail program. This key is only valid when the EMAIL CONFIGURATION BUSINESS RULE has the key value 'E-MAIL INTEGRATION' set to ENHANCED. Options include:

EMBEDDED URL - URL links are specified in the e-mail body.

HTML - Included in the e-mail body.

TEXT - Only Text is included in the e-mail body.

URL - URL links are included at the end of the e-mail body.

USE ASSOCIATED DOCUMENTS - This key determines whether the Approval Routes can be associated with document types. Set to ON to make the Associated Document view available in the Routing List module and to have Approval Routing LOVs reference the document types entered on that view.

Batch Processes

Clear Event Queue - sdbp_event_queue;

Clears Event Queue records based on the setting of the Event Queue rule key in the Batch Purge Parameters Business Rule.

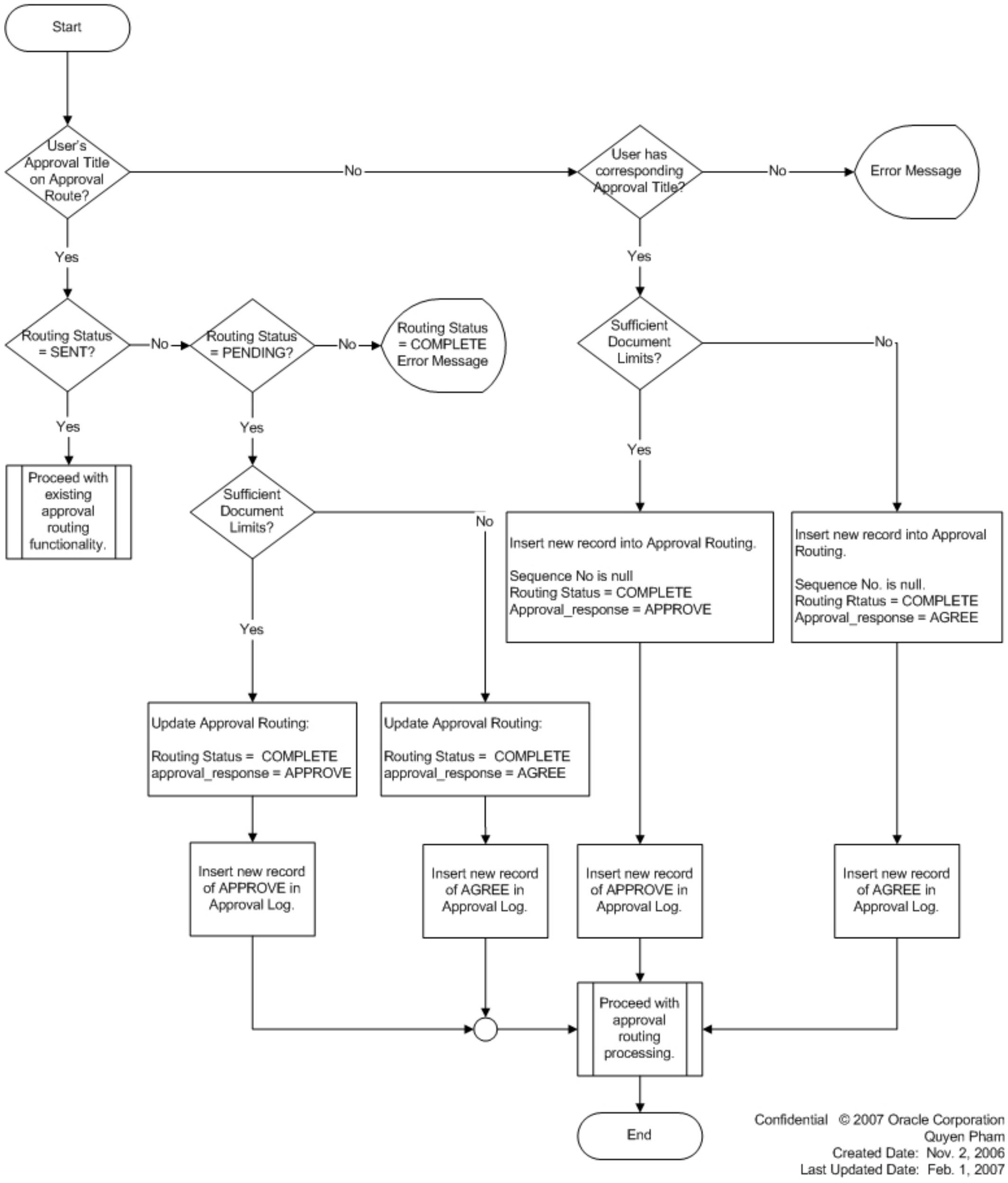
Copy Record

ROUTELIST - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Process flow:

Approval Routing
Change Record's Status from Pending Approval to Approved


Start
User's Approval Title on Approval Route?
No
User has corresponding Approval Title?
No
Error Message
Yes
Yes
Routing Status = SENT?
No
Routing Status = PENDING?
No
Routing Status = COMPLETE Error Message
Sufficient Document Limits?
No
Yes
Yes
Proceed with existing approval routing functionality.
Sufficient Document Limits?
No
Yes
Yes
Insert new record into Approval Routing.
Sequence No is null
Routing Status = COMPLETE
Approval_response = APPROVE
Insert new record into Approval Routing.
Sequence No. is null.
Routing Rtatus = COMPLETE
Approval_response = AGREE
Update Approval Routing:
Routing Status = COMPLETE
approval_response = APPROVE
Update Approval Routing:
Routing Status = COMPLETE
approval_response = AGREE
Insert new record of APPROVE in Approval Log.
Insert new record of AGREE in Approval Log.
Insert new record of APPROVE in Approval Log.
Insert new record of AGREE in Approval Log.
Proceed with approval routing processing.
End

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Chapter 2

Administration Subsystem

The Administration subsystem is primarily reserved for working with database settings. You can use the Administration subsystem to set up user profiles, describe how your organization's business practices work within the system, and much more.

Most users will use the Administration subsystem for changing their user profiles and for establishing WorkFlow Groups. Access to most of the other modules is usually restricted to a limited number of users or to the system administrator and the database administrator only.

Business Rules Module

There are many functions and features built into the system that can be configured through rules to meet your business requirements. Business rule settings determine processing functionality in the application, without requiring overall program changes. The system uses business rules to create system flexibility without having to recreate the software for each organization.

Users can not create new rules. However, application users with the proper authorization can change Rule Types, descriptions, comments, parameters, and list items.

Business rules vary in their nature, some control how the system processes information, others store default information and parameters. For any given rule you enter parameters or set the Options Status to ON or OFF, YES or NO to activate or deactivate it.

All of the business rule list items and parameters should be set by a system administrator during the set up phase of the system package.

Caution: Once these business rules have been set with the help of a Business Analyst, they should only be changed after careful consideration and consultation with Oracle Utilities Work and Asset Management. Improper changes can disrupt how the system processes your organization's information.

Rule ID

Each business rule is delivered with a unique Rule ID.

Rule Type (First Unlabeled Field)

There are three types of business rules While these distinctions are primarily to help in searching for specific groups of rules you should not change the rule type without very careful consideration.

BUSINESS - Rules that model specific Business Practices of multiple organizations across several industries. By setting these rules properly you can replicate many of the specific practices of your organization. An example would be settings governing how inventory is conducted.

CONFIGURATION - Rules that affect how the system behaves without affecting processing that affects your organization's Business Practices. An example would be how drill-down behaves for users.

CUSTOM - Rules that are customized specifically for your organization. An example would be configuring the interface between the Oracle Utilities Work and Asset Management system and your organization's General Ledger application.

Rule Style (Second Unlabeled Field)

There are two basic 'styles' of business rule:

PARAMETER - Rules that govern processing such as defining how long a specific document should age before being purged from the system or archived.

LIST - These Rules provide a way to associate items, such as usernames, with processing. For example determining which users should be granted access to pay rate information.

Limit?

A check in the Limit? check box indicates that the business rule will not be updated by installation of new releases.

Note: As new functionality is added to the system, we must sometimes change or add to business rules. While we try to ensure that these changes will not negatively affect users, this is not always possible. To avoid this situation you can elect to protect a business rule from update in future releases and service packs by checking the Limit? check box and clicking the Save icon on the toolbar.

Description and Comment

The Description and Comments give information about the business rule and how it should function. Words from the Description can be used on the Business Rules Search Options window to help find a given rule. The Comments field usually contains notes about the Rule's keys which are displayed in the lower section of the window.

The Rule “Keys”

The upper section of each Business Rule window remains constant from business rule to business rule. The lower section of reach Rule contains the Rule's keys. These sections vary greatly. For more information on a rule key please refer to the individual rule description.

Reports

S_RPT002 - Business Rule Report

Lists all of the business rules in the Business Rule module under System Configuration in the Administration subsystem

Custom Rules

Some business rules that appear in the system are tailored for specific clients, interfaces, or other specific needs. In general you can disregard these rules during your configuration session.

ACCOUNT RULES - This custom rule is used by a client-specific interface routine and is not applicable for general use.

ANALYSIS VIEWS ACCESS LIST RULE - This rule is used in conjunction with customized functionality which enables linking of Oracle Utilities Work and Asset Management and Microsoft Excel spreadsheets. In order to use this functionality, you must run sql scripts (provided by Oracle Utilities Work and Asset Management), and store the excel spreadsheets in a networked location.

The business rule is used to MANAGE (not create) the users that are created using the script. Once the script is run, it populates the business rule, and at that point you can assign additional plants to those users, or reassign their plants. The users created in the script act like “dummy” users for each plant. I.e., standard usernames and passwords cannot be used when executing “refresh data” in Excel.

Your system administrator should work with a Oracle Utilities Work and Asset Management representative to configure and implement this functionality.

AP BATCH INTERFACE RULE - This rule is used to set up processing for an Account Payable interface. AUTO GENERATE AP_BATCH_NO: Enter ON in the OPTION STATUS column to allow Account Payable batch numbers to be generated from the Ready for Payment Report (Report 63 in the Administration module, Report Administration). Enter OFF in the OPTION STATUS column to disallow Account Payable batch numbers to be generated.

EDI TRANSACTION CODES RULE - Defines the transaction codes and their relationship with modules.

GIS ASSET INTERFACE - This rule shows the list of GIS Views to be processed by the GIS Asset Interface. The GIS View must match SV_GIS_ASSET_LAYOUT. GIS View records will be copied directly to SA_ASSET. GIS Table will be updated with the newly created Asset ID (ASSET_RECORD_TYPE - ASSET_ID).

GIS SETUP RULE - This rule defines which GIS tool is to be used with Oracle Utilities Work and Asset Management. Setting the ACTIVATED GIS OPTION rule key to ORACLE1 prompts the system to use the integrated GIS Viewer which is licensed separately, but can be accessed from the Home Page. Please review the relevant documentation for settings related to external third party options such as ESRI1, Intergraph, and Autodesk.

GIS SPECIFICATION INTERFACE - This rule shows the list of GIS Views to be processed by the GIS specification interface. GIS View must match SV_GIS_SPECIFICATION_LAYOUT. GIS View records will be copied directly to SA_SPECIFICATION. Then the GIS Table will be updated with the newly created Specification ID (SPECIFICATION_RECORD_TYPE - SPECIFICATION_ID).

GIS View must contain SYNERGENID. All other fields should have the following format: "spec_seq_no-" || GIS_FIELD Example: "1-" || pipe_length

GIS VIEW ATTRIBUTES - Defines Asset Type Views to be used by GIS (e.g. Manholes, Pipes, Hydrants, Valves, etc). The views are custom and need to be created per Asset Type. This rule is intended for custom use with GIS. Please contact your Project Director for configuring setup.

INTERFACES - Allows you to explicitly include or exclude specified interfaces from interface processing. If this rule is set to “ON”, then the interface table listed will be populated with data rather than the normal processing associated with the interface point. For example, if SA_REQUISITION_INTERFACE is set to “ON” then when REQUISITION_STATUS is changed to PO CREATED the interface table is populated and the purchase order record is not generated.

ORACLE CAI FINANCIALS ADMIN - Used to control functionality related to the Financials Option2, Oracle Financials CAI Interface.

ORACLE FINANCIALS - Turns on and off various interfaces to Oracle Financials (version 9.x).

ORACLE PURCHASING - Controls various interfaces to Oracle Financials (version 9.x) Purchasing.

OUBI SETUP RULE - Business Intelligence. Configure settings to determine which extracts will be completed during regular processing . This rule can also be used to define extraction details such as data source, file names and the output directory. If desired, any extract can be turned OFF so that it is not included in the overall extraction. Please refer to the Business Intelligence guide for more information.

REPORT LABELS - Controls labels for custom reports. Is not applicable to general users.

RFGEN BARCODING SETUP - Used to set up barcoding processing using RFGen network.

SAIF CHARGE NUMBERS INTERFACE - Allows you to include or exclude particular charge numbers from populating the SAIF_CHARGE_NUMBERS table. This Business Rule applies to the following modules: Asset, Function, Process, and Work Order Task.

TIMEKEEPING DTA PAY CODE - Sets up parameters for the pay codes defined in Code Table 72. This rule is used with a client-specific interface routine and is not applicable for general use.

TIMEKEEPING DTA REGULAR TYPE - Sets up edit checks for timekeeping. Note: This Rule is used in conjunction with a client-specific interface routine and is not applicable for general use.

Integration Rules

The following business rules must be configured to facilitate interfaces between Oracle

Utilities Work and Asset Management and other products. Unless your organization uses integrated products, you can disregard these rules during your configuration session.

Please contact Oracle Utilities Work and Asset Management for more detailed documentation.

PRODUCT INTEGRATION - This rule defines the type of integration that is being used with the system. Point to Point indicates that Oracle Utilities Work and Asset Management is integrated with only one other product. Field Work indicates that Oracle Utilities Work and Asset Management is integrated with both Oracle Utilities Mobile Workforce Management and Oracle Utilities Customer Care and Billing.

PRODUCT INTEGRATION CCB CONTACTS - Customer Contacts can be generated in CCB upon creation or update of a CCB Field Activity from Service Requests. The Gen Contact column identifies whether the Customer Contact is generated or not. The Contact Type and Contact Class correspond to the values to be used for the Customer Contact and should be populated with values that have been established in CCB. The description field contains the text to be used for the Customer Contact description. The Trigger To Do field identifies whether a To Do is generated along with the Customer Contact. The Trigger Days and To Do Role fields are used to identify the time frame to generate the To Do and the user role to receive the To Do.

These rules must be set before inserting or updating of service requests tied to CCB Field Activities.

PRODUCT INTEGRATION CCB - Used to define values for the CCB Integration Interface. Refer to the CCB Integration Guide for more information.

PRODUCT INTEGRATION CCB FA TYPES- Used to define values for the CCB Integration Interface. Refer to the CCB Integration Guide for more information.

PRODUCT INTEGRATION CCB STATUS - This rule maps Oracle Utilities Work and Asset Management Service Request statuses to equivalent CCB Intermediate statuses. Only Service Requests with mapped CCB Intermediate statuses are included in integration file updates.

PRODUCT INTEGRATION FIELD WORK - Designates the parameters to be used when service request and customer records are created from interfaced records.

PRODUCT INTEGRATION MWM - This rule is used as place holder for values used in MWM Integration Interface.

STANDARD SERVICE REQUEST INTERFACE - This business rule controls the fields that will be updated on an inbound service request record that already exists in Oracle Utilities Work and Asset Management. For each column name, indicate whether or not the corresponding field should be overwritten during an update.

WEB SERVICES GATEWAY - This rule controls settings for outbound message processing. The parameters set here determine how Oracle Utilities Work and Asset Management communicates with web services in other systems.

> **Web Service Gateway Key** - References the services that Oracle Utilities Work and Asset Management can interface with.
>
> **Username and Password** - The login needed to access the application referenced in the Web Service Gateway Key column.
>
> **Dataset ID** - These values tell Oracle Utilities Work and Asset Management which table to retrieve information from, and provide the keys to use from that table. For

CC&B and FW the keys must also be configured on the other application as well as here.

Consumer Class - The Consumer Class column indicates the java class name called by Oracle Utilities Work and Asset Management.

Service URL and Gateway URL - The service URL column indicates the URL that the consumer class indicated in the previous column uses to call the other system. Gateway URL indicates the SIA web services server. The Consumer Class should be stored on this server. Use the IP address to indicate the service URL for both columns.

EBS Work Order Materials - This is actually a responsibility function which is used in the integration between Oracle Utilities Work and Asset Management and Oracle Oracle E-Business Suite (EBS). This controls user access to work order materials. When a user has this function the EBS Deliver Location field is displayed and updatable on the BOM Picklist and Material (Detail) views on the Work Order Task.

Interface Rules

Interface business rules specify the fields that are updated during interface transactions within the various modules where they apply. Interface settings are described in more detailed in the Interfaces Guide.

In addition, the Interfaces Rule and the Interface Parameters Rule provide general interface settings.

- Account Interface
- Accrual Interface Rule
- Asset Interface
- Catalog Interface
- Customer Address Interface
- Customer SA Interface
- Customer Interface
- Default Accts for Interfaces
- Employee Interface
- GL Transaction Interface
- Manufacturer Vendor Interface
- Service Request Interface
- Storeroom Interface
- Vendor Interface

Interfaces Rule

(Custom)

This rule explicitly includes or excludes specified interfaces from interface processing.

Interface Rule and Option Status

Enter the interface program names to be included or excluded from interface processing in the Interface rule. The Option Status column should be set to ON or OFF to include or exclude the routine from interface processing. If an interface routine is not listed here but exists as a part of the interfaces which make up interface processing, by default, the interface will be included during processing.

For example, if SA_REQUISITION_INTERFACE is set to “ON” then when REQUISITION_STATUS is changed to “PO CREATED” the interface table is populated and this applications Purchase Order is not generated. Interface settings are described in more detailed in the Interfaces Guide.

Interface Parameters Rule

This rule contains parameters that drive business logic in different interfaces. The Interfaces Guide provides additional information regarding specific interfaces.

Para Name and Param Value

ASSET ADDRESS PARSER & CUSTOMER ADDRESS PARSER - These rule keys are used with CCB Integration. The stored procedure entered in the Param Value field transforms address information coming from CC&B so that the information conforms to the fields in WAM.

In WAM parts of an address (Street Number, Street Name, Street Suffix and Apartment Number) are stored in individual fields. CC&B does not store addresses in such detail, rather it stores entire lines of addresses in Address 1, Address 2, and so on.

The parameter entered for these rule keys controls how address parsing occurs when the system processes customers, premises & service points. You can replace the standard batch job procedure with a custom procedure that uses the same parameters. The provided parameter parses out street number and name.

INVENTORY INTERFACE HANDLING - This key determines account and expense code handling for the WIFP_INVENTORY_LOG_INTERFACE. If the Param Value is set to OLD, the system uses the account from the referenced work order task and the expense code from the storeroom. If the Param Value is set to NEW, the system uses the values from the interface table. When NEW processing is used, the action type must also be set to ‘P’. This setting can be accessed in WAIF_INVENTORY_LOG.

INVOICE STATUS - This key specifies the valid status for invoices sent out from the application. The default is POSTED.

Obsolete Rules

The following business rules are no longer used in the system. Many of them have been replaced, or are simply no longer in use.

- Barcode Label Printers
- Checkout to Finished WO
- Holidays (Custom)
- Labor Costing Prm Multiplier
- Schedule Labor Resources- made obsolete by changes in 1.7.5. Functionality moved to the Crew Hours view in the Crew module.
- Stores Transaction Groups - formerly used for BI processing. No longer used.

Advanced Materials Management Option (AMMO)

In prior releases the Advanced Materials Management Option (AMMO) was included as an extension to the system providing processing related to stock tracking, inspections, and discrepancy reporting. These options are not available in this release, however, some code tables and business rules remain in the system as artifacts of this additional processing.

- Bin Quantity Tracking Options
- Inspection Report Generation
- Internal Tracking Options
- Quote Options

AMMO Sequence Numbering Tables

- SA_ASSET_INSPECTION_DETAIL
- SA_BIN
- SA_BIN_RELOCATION
- SA_INSPECTION
- SA_INSPECT_TEMPLATE
- SA_INTERNAL_TRACKING
- SA_INVENTORY_LOG
- SA_RETURN_REQUEST
- SA_STOREROOM_REORDER_HISTORY
- SA_DISCREPANCY

Buyers Module

Buyers have duties that are different from those of many other job titles within an organization. You can use the Buyers module of the Administration subsystem to define and assign those duties for individual users.

Each buyer has a unique buyer code. A list of values is available for the Username, drawing information from the User Profile module of the Administration subsystem. When you select a Username, the system supplies the user's name, phone number and fax number from the User Profile.

Fields

Stores Reorder

Check the Stores Reorder box to authorize a user to review and authorize Requisitions and Purchase Orders created by the system based on ABC Processing for Storeroom records.

Update Approved PO

Check this box to authorize a Buyer to modify Purchase Orders that are in Approved status.

Update Issued PO

Check this box to allow Buyers to cancel Line Items on Purchase Orders in Issued status as long as the Line Items do not have any receipts posted against them.

1. If the Update Issued PO authority is given to a Buyer it bypasses the standard Approval Process and allows them to update the value of the Purchase Order without validating the buyer's Approval Limit.
2. Also, buyers who have this authority do not need to create Change Orders or Expedite PO records. They can simply make the changes directly on the PO by changing the status of the PO to Updating and when the status is changed back to Issued the system automatically creates Change Order and/or Expedite PO records in the background as appropriate to the changes made to the PO. These backup records allow for standard audit tracking of all changes made to the Purchase Order record.

Code Table and Codes Module

The system uses code tables to validate user-entered information throughout the system. Generally, when a user clicks on the List of Values button for a field in a given module, the system presents the list of codes from the appropriate code table. Each code table consists of a unique number, a table description, and a list of codes and code descriptions.

Occasionally, the available code table will not meet the needs of your organization. In these cases, it is possible to create custom lists of values which do not use the standard code tables. Some custom lists of values can be created based on User-Defined fields (UDFs). However, most custom lists of values will require referring to the software code and should only be considered with the help of Oracle Utilities Work and Asset Management.

Fields

Table Number

This field holds a unique number that identifies the table. Table numbers 1 to 2000 are reserved for the system and you should not create tables with numbers in that range. It is recommended that all custom codes be created as 3000 and above.

Description

A short description of the table. This description is searchable and displays on the Results of Search window.

Type

There are 3 types of code tables in the system. Some users may have the ability to change Code Table types depending on the authorities that you have granted within the system. You should not change any Code Table types without very careful consideration as making such a change may impact the entire system.

USER - Codes Tables that can be added or modified by users with the appropriate Responsibilities assigned in the Responsibilities module of the Administration subsystem. Codes over 2000 are reserved for user-defined code tables.

DBA - Code Tables that can only be modified by the Database Administrator. The entered information impacts how the application functions and should be modified only be someone who is aware of how changes impact the system. Codes 1999 and below are reserved for System and DBA code tables.

SYSTEM - Code Tables that can be accessed by system users, but can not be modified by anyone other than Oracle Utilities Work and Asset Management. These code tables and their Codes are necessary for the application to run properly. Any questions or concerns about these code tables should be directed to the Database Administrator (DBA). Codes 1999 and below are reserved for System and DBA code tables.

Code Length

The Code length indicates the maximum number of characters that can be used in any code in the table. Changing the Code Length does not affect the display of the code in the list of values.

Code

The individual code name. The systems checks to make sure that the code is unique within the table (but not from one table to another) when you save the Code record.

Note: You can not modify a Code value once you have saved it. Make sure to only develop codes that will support your organization's Business Practices.

Description

This Description field contains a short description of the code. The system displays this text beside the code on the List of Values, and can be searched using the Find button on the List of Values window.

Link

This feature is used in situations where the value entered into one field determines which Code Table to use for the following List of Values. For example: in the Commodity Codes view in the storeroom module of the Resource subsystem, the value you enter in the first field (Category) determines which Code Table to use for the next field (Name). Each Code entered into the Category Code Table has a Link value identified, linking several Commodity Name code tables to the Category Code Table.

Reports

S_RPT015 - Code Table Definition Report

Lists all of the code tables defined in the Code Table and Codes module of the Administration subsystem. This report has no Code Table Values.

S_RPT001 - Code Table Report

Lists all code tables and the Code Values as defined in the Code Table and Codes module, Administration subsystem.

System Code Tables

These code tables can be accessed by system users, but can not be modified by anyone other than Oracle Utilities Work and Asset Management. These code tables and their Codes are necessary for the application to run properly. Any questions or concerns about these code tables should be directed to the Database Administrator (DBA).

- Code Table 0: Yes/No
- Code Table 1: Work Order Type Codes
- Code Table 19: PM Frequency Codes
- Code Table 15: Country Codes
- Code Table 30: Runtime Codes
- Code Table 34: State or Province
- Code Table 35: Category Codes
- Code Table 36: Consumables Category
- Code Table 50: Duration Units
- Code Table 60: Direct Charge Units
- Code Table 64: Form Function Types
- Code Table 65: Purchasing Vendor Characteristics
- Code Table 66: Approval Types
- Code Table 71: Work Types for BI Integration
- Code Table 74: Street Directions
- Code Table 79: Physical True Count Item Status
- Code Table 93: Report Output File Formats
- Code Table 94: Report Called By Modules
- Code Table 142: Tracking Transaction Codes

- Code Table 143: Receiving Transaction Codes
- Code Table 144: Inventory Transaction Codes
- Code Table 145: Stores Transaction Codes
- Code Table 146: Account Log Transaction Codes
- Code Table 148: Bin Transaction Codes
- Code Table 149: Requisition Types
- Code Table 151: Purchasing Item Types
- Code Table 155: Purchase Order Types
- Code Table 158: Invoice Pay To Vendor Indicator Values
- Code Table 180: Standard Note Document Types
- Code Table 184: Approval Document Types
- Code Table 185: Approval Routing Document Types
- Code Table 193: Pm Forecast Adjustment Codes
- Code Table 204: Shelf Life Units
- Code Table 229: Non-Equipment Asset Record Types
- Code Table 286: Account Treatment Type
- Code Table 287: Tracking Method
- Code Table 288: Assessment Status
- Code Table 289: Service Request Status
- Code Table 290: Storeroom Auto-Reorder Sources
- Code Table 291: Work Status
- Code Table 292: Condition Rating Basis
- Code Table 293: Delivery Lead Time Units
- Code Table 294: Folders
- Code Table 295: Item Type
- Code Table 296: Req Status Type
- Code Table 297: Rfq Status Type
- Code Table 298: Downtime Indicator
- Code Table 299: Weekly Schedule Indicator
- Code Table 300: Daily Schedule Indicator
- Code Table 301: Held For Parts Indicator
- Code Table 302: Change Request Indicator
- Code Table 303: Po Status Type
- Code Table 450: Standards Categories
- Code Table 800: Graph Colors
- Code Table 1110: Schedule Plan Summary Label

DBA Code Tables

These code tables can only be modified by the Database Administrator. The entered information impacts how the application functions and should be modified only be someone who is aware of how changes impact the system.

- Code Table 095: Report Selection Block File Locations
- Code Table 096: Report Group
- Code Table 097: Report Types
- Code Table 156: Invoice Check Codes for AP Processing
- Code Table 187: Inventory Adjustment Reasons
- Code Table 188: Manual Hold Adjustment Reasons
- Code Table 251: Personal ID (Account Segment 1)
- Code Table 252: Area/Dept? (Account Segment 2)
- Code Table 253: High Level (Account Segment 3)
- Code Table 254: Mid Level (Account Segment 4)
- Code Table 255: Low Level (Account Segment 5)
- Code Table 256: Flex (Account Segment 6)
- Code Table 257: Account Number = (Account Segment 7)
- Code Table 258: Account Number = (Account Segment 8)
- Code Table 259: Account Number = (Account Segment 9)
- Code Table 260: Account Number = (Account Segment 10)
- Code Table 451: Unit Code (Asset Segment 1)
- Code Table 452: System Code (Asset Segment 2)
- Code Table 453: Designator Code (Asset Segment 3)
- Code Table 454: Asset Segment 4 (Asset Segment 4)
- Code Table 455: Type (Asset Segment 5)
- Code Table 456: Asset Segment 6
- Code Table 457: Asset Segment 7
- Code Table 458: Asset Segment 8
- Code Table 459: Asset Segment 9
- Code Table 460: Asset Segment 10
- Code Table 560: Workshop Codes
- Code Table 561: Subsystem Codes
- Code Table 562: Module Codes
- Code Table 563 - Function Codes
- Code Table 564: Decision Status Codes
- Code Table 565: Priority Codes

Obsolete Code Tables

The following code tables are no longer used in the system. Many of them have been replaced (as noted), or are simply no longer in use.

- Code Table 5: Permit Types (Obsoleted by the Permit Types Business Rule)
- Code Table 11: Vehicle Classes (Vehicle classes are defined in the Asset Class module)
- Code Table 21: Printer Names for Report Processing
- Code Table 27: Work Codes (Obsoleted by Code Table 13)
- Code Table 33: Blanket Purchase Order Types (Replaced by Code Table 151)
- Code Table 47: Service Contract Rate Types
- Code Table 72: Timesheet Regular Time Types
- Code Table 90: Project Types (Obsoleted by Project Work Order Account Business Rule)
- Code Table 92: Invoice Item Types
- Code Table 103: Required Documentation Types
- Code Table 104: Currency Code (Obsoleted by the Currency Exchange Rates module)
- Code Table 133: Engineering Specification Linked Pseudo Codes
- Code Table 135: Assigned Planner (Obsoleted by the Planner Business Rule)
- Code Table 176: Expense Report Category
- Code Table 191: Work Order Job Codes (Obsoleted by Code Table 190)
- Code Table 205: Route Description Code
- Code Table 206: PM Route Types (Obsoleted by Code Table 20)
- Code Table 210: Currency Codes (Obsoleted by the Currency Exchange Rates module)
- Code Table 220: Drawing Types
- Code Table 340: PM Master Units (Obsoleted by Code Table 107)
- Code Table 600: Asset Class (Not Used - Codes are created in the Asset Class module.)

Advanced Materials Management Option (AMMO)

In prior releases the Advanced Materials Management Option (AMMO) was included as an extension to the system providing processing related to stock tracking, inspections, and discrepancy reporting. These options are not available in this release, however, some code tables remain in the system as artifacts of this additional processing.

- Code Table 140: Return Problem Codes
- Code Table 192: Supplier
- Code Table 194: Action
- Code Table 195: Problem Trend
- Code Table 196: Category Trend
- Code Table 197: Group Trend

- Code Table 199: Disposition Trend
- Code Table 201: Quantity Classes
- Code Table 214: Inspection Types
- Code Table 215: Inspection Category
- Code Table 320: Facility Types
- Code Table 321: Bin Types
- Code Table 322: Bin Level
- Code Table 323: Bin Storage Types
- Code Table 324: Bin Orientation
- Code Table 325: Bin Document Types
- Code Table 361: EDI Transaction Types

Configuration Guide Module

The Configuration Guide module is used during the set up of the system to help System Administrators (SA), Database Administrators (DBA), and Business Analysts (BA) keep track of which parts of the system have been configured as the system is being installed. The rows and columns are set up much like a standard spreadsheet where any data can be sorted, added, deleted, or updated. You can order data by any column in either ascending or descending order, or rearrange the layout of the columns to meet your specific needs.

You can also add rows to the Configuration Guide by highlighting a line and clicking the New icon. A row can be deleted by highlighting the row and clicking the Delete icon. Update any information on the screen by entering the desired data in the field and clicking the Save icon.

Note: There is more information than can be displayed on the screen at one time. Use the scroll bar located at the bottom of the window to scroll left and right to see the rest of the data.

The configuration of this item will be handled by the Oracle Utilities Work and Asset Management team and updated according to decisions made throughout the configuration workshops.

Code Tables

Code Table 560 - 565: Configuration Codes

Code tables 560 - 565 are DBA type code tables that define the modules, functions, subsystems, priorities, and decision statuses that are used in the Configuration Guide module.

Currency Exchange Rates

Currency codes and exchange rates are entered on purchasing documents to calculate the appropriate procurement costs. To establish the default code to be used in most instances, enter a code in the Local Currency field on the Plant record.

Fields

Currency

Create unique currency codes as appropriate to your business needs.

Effective Date, Exchange Rate, and Comments

Exchange Rates can be entered manually with comments as they change. The system defaults the current date for the Effective Date, but this can be changed if necessary.

Fine Grain Access Module

Assigning Fine Grain Access is a two-part process. First the security policy is defined in the Fine Grain Access module, then it is assigned to users in the FGA Responsibility module.

Use Fine Grain Access to extend security beyond the levels permitted in the Responsibilities module. Fine Grain Access operates during searching to restrict the records that individual users can see. For example, Fine Grain Access could be used to allow users to access only the work orders for their department or only the Purchase Orders they have created. An additional 'where clause' that is applied to all database queries the user runs against the table identified in the FGA record is required. The where clause is written as a SQL selection criteria statement based on a logical operator such as: +, =, != , >, LIKE, or IS. Fine Grain Access is invisible to the user and is enforced regardless of how the data is accessed.

Fields

Sequence No.: FGA ID

The record number is comprised of a unique ID (Ex. “ACCESS FGA1”). FGA record numbers are typically set to be user defined.

> **TABLE NAME** - A_FINE_GRAIN_ACCESS - The database table that the sequence number is generated for.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Owner

Select the name of the person responsible for the access level from the List of Values. Owner is one of the values you can specify when searching the Fine Grain Access module.

Table Name

All Fine Grain Access records must reference a table in the system. When a user with a specific FGA Responsibility in their User Profile executes a query against the table, the additional where clause is executed.

Condition

Enter the SQL statement that the system will add to queries the user executes against the table. For example, the following condition applied to queries to the SA_PURCHASE_ORDER table results in Purchase Orders in received status with vendor codes beginning with RJB: VENDOR_CODE LIKE 'RJB%' AND PO_STATUS = 'RECEIVED'

FGA controls must first be first defined in the Fine Grain Access module. These records can then be added to a FGA Responsibility, which can be assigned to specific users.

As with other responsibilities, you must be careful not to group conflicting FGA conditions within the same FGA Responsibility. It is always a good idea to test FGA Responsibilities before releasing them to insure that they work in the manner you intended.

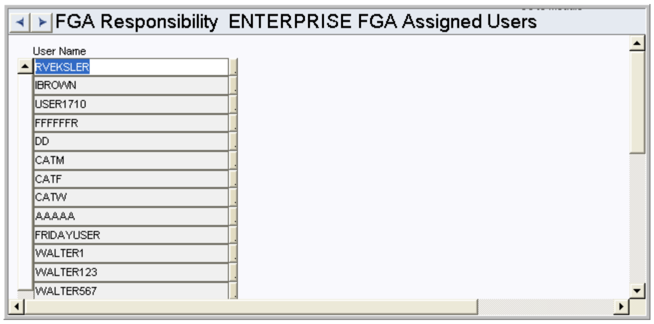
FGA Responsibility Module

Administrators can use Fine Grain Access to extend security beyond the levels permitted in the Responsibilities module. While Responsibilities can restrict the modules and functions available to users, Fine Grain Access operates during searching to restrict the records that individual users can see.

Views

Assign a FGA Responsibility to users in the Assigned Users view. This view allows you to make several assignments at the same time. The alternative is to assign FGA Responsibilities through the FGA Responsibility view of the User Profile module in the Administration subsystem.

Assigned Users



User Name
RVEKSLER
IBROWN
USER1710
FFFFFFR
DD
CATM
CATF
CATW
AAAAA
FRIDAYUSER
WALTER1
WALTER123
WALTER567

Help Form Module

The Help Form module in the Administration subsystem maintains the context sensitive links between the Oracle Utilities Work and Asset Management application and the online Help file. Context sensitivity is what makes online Help open to discussion about the particular screen you are viewing when you select online Help. The links are established by assigning a unique online Help topic (.htm page) to each form and block combination in Oracle Utilities Work and Asset Management. A stored procedure determines if a user guide, cue card or tutorial topic opens, depending on which option you select from the main Help menu. Oracle Utilities Work and Asset Management technical writers use RoboHelp to maintain the hyperlinked online Help topics supplied with the application. However, you can customize online Help without using RoboHelp or a similar online Help authoring system.

Caution: Before modifying the content or navigation for the online Help, you should backup the online Help structure as it was delivered with the application. Also make sure that your customized structure is backed up before you install any system upgrades or patches. Only System Administrators and/or Database Administrators should have access to this functionality.

Customizing the Help Form

You can customize the "help map" to call your own customized online help documents for certain form / block combinations, while continuing to use the regular Oracle Utilities Work and Asset Management Help file for all other topics.

In addition to customizing the Help Form, you must also create the customized online Help documents you want to open. These documents must reside on the same server as the Oracle Utilities Work and Asset Management online Help files unless they are stored on an accessible network location on the internet/intranet.

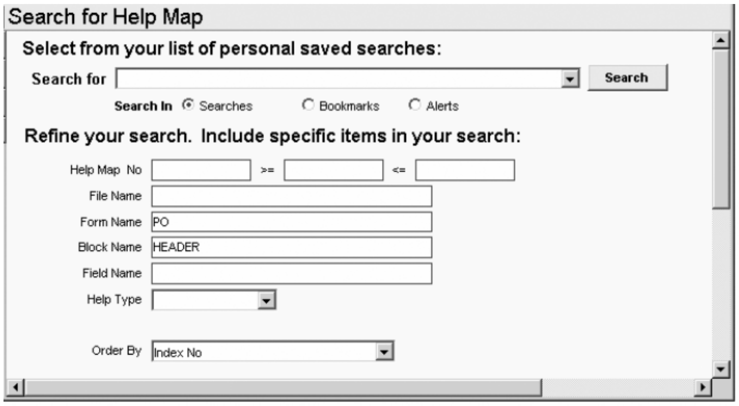
How to Customize the Help Form

1. **Open the Help Form module.**

   The Help Form module is in the Administration subsystem.

2. **Open the appropriate record by identifying the Form and Block where you want to map your content.**

   This will be something like PO / HEADER or WOTASK / ITEM.



Search In ● Searches ○ Bookmarks ○ Alerts

Form Name: PO

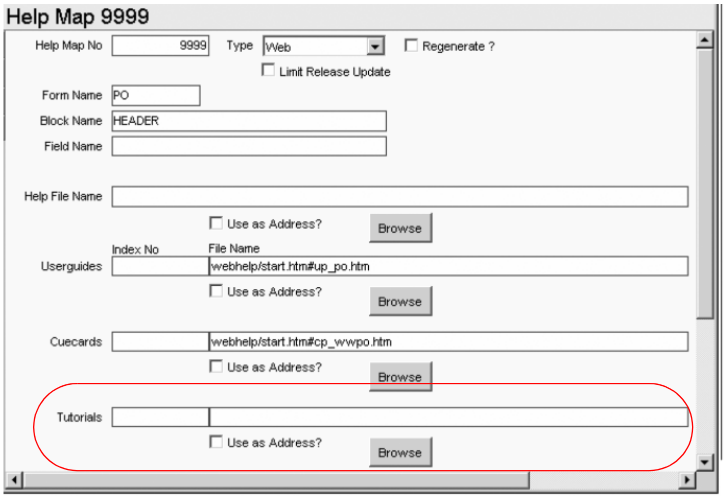
Block Name: HEADER

Order By: Index No

Search for Help Map
Select from your list of personal saved searches:
Search for
Search
Refine your search. Include specific items in your search:
Help Map No
>=
<=
File Name
Form Name
Block Name
Field Name
Help Type
Order By

   Note: To link from the forms screen that shows when there are no modules open, use the form and block combination: MAIN/HOME.

3. **Locate the Tutorials section and enter the name of the file you want online Help to open for this form / block combination.**


Help Map 9999
Use as Address?
Browse
Index No
File Name

Help Map No: 9999
Type: Web
☐ Regenerate ?
☐ Limit Release Update
Form Name: PO
Block Name: HEADER
Field Name:
Help File Name:
Userguides: webhelp/start.htm#up_po.htm
Cuecards: webhelp/start.htm#cp_wwpo.htm
Tutorials:

You can use a full url, a network location, or you can store the files in the same location as they are for the Oracle Utilities Work and Asset Management online Help system and reference the webhelp folder.

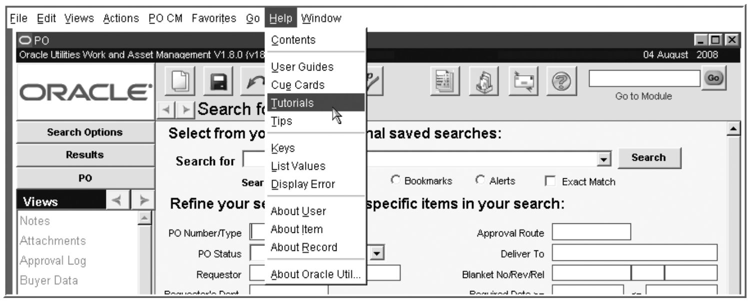
4. **Determine how the online Help will open.**

   If you place a check in the Use as Address box, the online Help is launched in a new browser with the exact URL used as the address. This assumes that you have entered a full working URL. If the box is not checked, the online Help is launched in a new browser with the URL appended to the end of the standard application URL. This can be a partial URL using the existing webapp file structure used with the standard application.

   This function can help you to direct the browser to the correct file location based on the decision you made on how to reference the custom files.

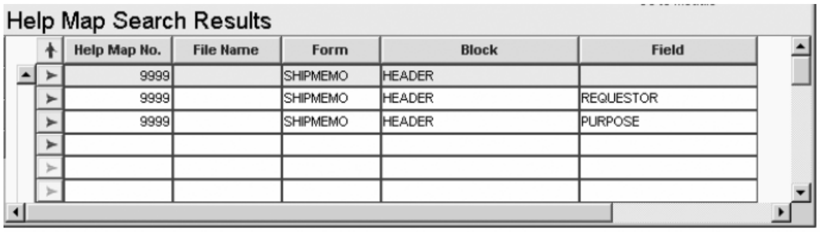
5. **Save the record.**

   You can now navigate to the form and block specified, select Help > User Guides (or Cue Cards) to display your custom online Help document.


File Edit Views Actions PO CM Favorites Go Help Window
PO
Oracle Utilities Work and Asset Management V1.8.0 (v18
04 August 2008
ORACLE
Go to Module
Search fo
Search Options
Results
PO
Views
Notes
Attachments
Approval Log
Buyer Data
Select from yo
nal saved searches:
Search for
Search
Bookmarks
Alerts
Exact Match
Refine your se
specific items in your search:
PO Number/Type
PO Status
Requestor
Approval Route
Deliver To
Blanket No/Rev/Rel
Contents
User Guides
Cue Cards
Tutorials
Tips
Keys
List Values
Display Error
About User
About Item
About Record
About Oracle Util...

Field Level Help

The Oracle Utilities Work and Asset Management application supports field level online Help although online Help is typically provided to the block level. To create custom online Help at the field level, prepare the appropriate .htm pages and save them with the other WebHelp pages on the server. Then modify the Help Form as described above but specifying the form, block and field the user must be on to call the custom page. In the example below context sensitive Help has been established for the Requestor and Purpose fields on the Shipping Memo header.



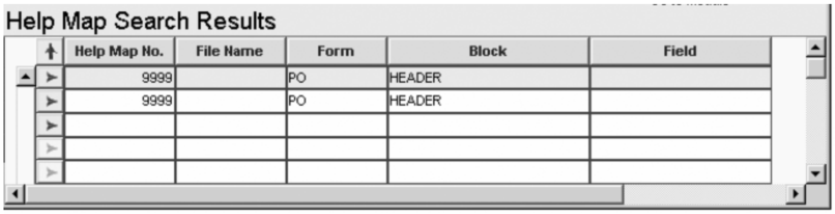
Help Map Search Results

Help Map No.	File Name	Form	Block	Field
9999		SHIPMEMO	HEADER	
9999		SHIPMEMO	HEADER	REQUESTOR
9999		SHIPMEMO	HEADER	PURPOSE

Troubleshooting

If your custom online Help text does not open as expected, verify that the filename and path entered on the online Help map is correct and that the file exists on the server.

Also, verify that you have not added a duplicate record for the same form/block combination. If you have added a new record, the system may be finding the old record first and ignoring your customized call. To verify this, search for the appropriate Form / Block combination from the Help Map search option window. If you find more than one record with the Help Map Number 9999 for the same Form / Block, delete the ones that are not referencing your custom online Help document.



Help Map Search Results

Help Map No.	File Name	Form	Block	Field
9999		PO	HEADER	
9999		PO	HEADER	

Installation Parameters Module

The installation parameters module tracks applied installations for auditing purposes. It also allows administrators to define system wide settings that apply to all user and all plants.

Parameter Descriptions

BATCH JOB DEBUG MODE

ON/OFF

This parameter determines whether the dbms_activity will be appended to the messages in the Job Manager Log. The dbms_activity will not be appended if the value is set to OFF. A value of ON will do otherwise.

CHART THUMBNAIL GENERATION

ON/OFF

Allows administrators to enable or disable the display of chart thumbnails. Disabling this feature can save system resources to speed up processing. Set to ON to display thumbnails and OFF to not display thumbnails. The default setting is ON. The SIA Application Server must be restarted whenever this parameter is modified.

CHART THUMBNAIL PROCESSING

ON/OFF

This Installation Parameter is used to manage the thumbnail processing in the on-line application. This controls whether chart thumbnails are displayed on metrics pages or in the charts views.

This parameter works in conjunction with the BATCH JOB MANAGER business rule which contains a batch job to regenerate the chart thumbnails on a regular basis. This batch job is called “GENERATE ALL CHART IMAGES” and should be disabled if you choose to turn this parameter OFF.

CHART_INVENTORY_VALUATION

Ex. ALL STOREROOMS

This value is used to restrict returned records for Inventory Valuation chart. Set the key value to a specific storeroom code to restrict chart by that specific storeroom, or leave value as 'ALL STOREROOMS' to retrieve data for all storerooms.

ENABLE PASSWORD RESET

ON/OFF

When set to ON the “Forgot Password” link is present on the login screen and users can click this link to have a temporary password emailed to the email address in their user profile.

Database User

For security purposes, a special database user is required to assign temporary passwords. This database user must have roles limited to "CREATE SESSION" and "ALTER USER". This database user is not created during installation by default. Instead the script named createPasswordResetUser.sql, can be run manually after installation to create the database user. When the script is run, the installer will prompt for the username and password for the database user ALTER USER role.

OC4J Datasource

An OC4J datasource should be created using the same credentials defined in response to the createPasswordResetUser.sql script prompts. The name of the datasource should be "alterrole" + datasource,” with datasource set as the name of the main datasource for the application. Adding the main datasource name creates uniqueness when multiple datasources exist for different environments on the same host machine.

INDEX_INITIAL_EXTENT
Ex. 20K

INDEX_NEXT_EXTENT
Ex. 20K

INDEX_TABLE_SPACE
Ex. INDX

JUMBO_SIZE_INITIAL_EXTENT
Ex. 40K

JUMBO_SIZE_NEXT_EXTENT
Ex. 40K

LARGE_SIZE_INITIAL_EXTENT
Ex. 30K

LARGE_SIZE_NEXT_EXTENT
Ex. 30K

LICENSE OWNER
Ex. SYNERGYS

MID_SIZE_INITIAL_EXTENT
Ex. 20k

MID_SIZE_NEXT_EXTENT
Ex. 20K

PHONE_NUMBER_FORMAT
Ex. (XXX) XXX-XXXX
This is the phone number format used by the SIA application. Example: a raw value of 9259357670 with a format mask of XXX-XXX-XXXX would result in a displayable phone number of 925-935-7670.

For non-english installations, the code should be set to NO FORMAT.

PK_INITIAL_EXTENT
Ex. 20k

PK_NEXT_EXTENT
Ex. 20k

PK_TABLESPACE
Ex. INDX

PRIMAVERA
Ex. s1876s1554

SCHEDULING TOTAL EST HRS DISP
ON/OFF
If set to ON, will display Total Hours Scheduled and Labor Estimate for each craft within the Daily and Workweek Scheduling modules. This also controls whether the Autofill Estimates tool is available in these modules.

SIA_TABLEOWNER
Ex. XADMIN_SYNERGEN

SMALL_SIZE_INITIAL_EXTENT
Ex. 20K

SMALL_SIZE_NEXT_EXTENT
Ex. 20K

SPELL CHECK
ON/OFF
This option controls the Spell Checking feature.

SUPER USER ROLE
Ex. SUPER

TABLEOWNER
Ex. SYNERGEN

TABLESPACE_NAME
Ex. USERS

TEMPORARY_TABLESPACE_NAME
Ex. TEMP

TINY_SIZE_INITIAL_EXTENT
Ex. 20K

TINY_SIZE_NEXT_EXTENT
Ex. 20K

Objects beginning with SDBT
ON/OFF
Most of these objects trigger a transaction to populate a log, although some trigger other events. The value controls whether the trigger is enabled or disabled.

Objects beginning with SAUT
ON/OFF
These objects control whether or not the indicated module is tracked in the system audit log module. The value controls whether the trigger is enabled or disabled.

Objects beginning with SABI
ON/OFF
These objects control Business Intelligence (BI) Integration triggers. The value controls whether the trigger is enabled or disabled.

Modules Administration - Forms Module

Use this module to access and maintain specific form information and processing. This includes defining which fields in a module are required entry, which are required at a certain point in time, setting up defaults, and more.

Required Fields, Enter Data, Secondary Required Fields, and Status Required fields

These three Views allow you to set requirements and/or defaults for fields in designated modules. Since fields are located within blocks on a form, you must enter both the Form Name and the Block Name for each field. The system then presents a List of Values based on the possible fields in that form and block.

You can list User Defined fields in the Module Administration - Forms module but you must use the name for the field (Attribute 1, Attribute 2, etc.) rather than the display label you assign to the field.

REQUIRED FIELDS - Fields on any given form can be marked as required entry, forcing users to enter a value into the field before saving the record. Within Required Fields, the Form Name and Description are displayed.

ENTER DATA - Enter Default values for fields.

SECONDARY REQUIRED FIELDS - Designate fields as required based on whether or not another field has been populated.

STATUS REQUIRED FIELDS - Designate fields as required based on the status of the record.

Field Localization View

The Field Localization view allows you to customize labels for the fields on a form. First, select a block name in the upper right corner of the screen. Then select the field on that block from the list of values in the Field Name column. The system returns the known System Label. You can then enter a customized Label and Hint text, if desired. The label and hint entered will overwrite the system label and hint the next time you open that form and block. If you enter a new label that is longer than the original label, the system displays a warning. However, there could still be enough space to display your label despite the warning. In this case you should view the actual module screen before deciding to modify the label that you have chosen.

Field Localization settings are dependant on the Plant where they were configured. For example, a user can view all localized fields for Plant 01, but if he or she logs on to Plant 02 where no customized field labels are set, only system labels will be available. This rule is true for most customized settings.

The last column on the screen allows you to designate a specific display format for the field. You should consult with Oracle Utilities Work and Asset Management Customer Service before modifying any display formats since placing the wrong type of format on a field might have an adverse affect on your ability to input and store data elsewhere in the system.

Copy Record View

Copy Record configuration should only be completed by a qualified database administrator with solid knowledge of the database structure.

Use the Copy Record view in Modules Administration - Forms to indicate the tables (views) that should be copied when the Copy Record action is selected from within a module. Here you enter or exclude all of the views in the module that you want to copy and indicate the execution order. Only the tables indicated in this view will be copied with a record. Some forms are delivered with default table and field values. These can be used as a guideline for configuring other forms.

Execution order is extremely important when configuring Copy Record functionality. The system must be configured to copy the header record first, then the child records, then the children to any of those child records, and so on. For example, the Asset module includes multi levels of views. If, for instance, SA_ASSET_PERMIT were placed ahead of SA_ASSET in the copy order, the system would not recognize SA_ASSET_PERMIT as having any valid data because the information needed from SA_ASSET would not yet be available. Likewise, SA_ASSET_PERMIT_ATTACHMENT could not be ahead of SA_ASSET_PERMIT for the same reason. Ordering the tables in a module in the wrong way could result in error messages or the creation of corrupt data.

To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module.

Field Defaults

Entries are ONLY made in the Field Defaults view if a change needs to be made to the field when the record is copied. If a table is included in the Copy Record view, but no fields on that table are indicated in the Field Defaults view, all of the fields will be copied with no changes made to the data. Fields included in the Field Defaults view will either be cleared of existing data when copied (when the Default Value is left blank) or to indicate a Default Value (enter the value in the Default Values field). The lists of values in both views are validated for tables in the module, and fields in the tables.

Copying Status Fields

Default values become very critical in cases where the record being copied includes a status field. In most cases, you would want to set a Default Value for the status field on all copied records so that the new record cannot be created in an unusable status. Copying a status incorrectly could result in error messages or the creation of corrupt data.

Responsibilities

Once a module is set up in the Copy Records view of the Module Administration (Forms) module, make sure that the users also have the Copy Record responsibility that is specific to the module.

Every module that includes the Copy Record functionality is listed as [FORMNAME] - COPY RECORD when you select Copy Records as from the Type drop-down in the Responsibility module.

Sequence Numbers

When the action is selected from a module the system opens a wizard that walks users through the process of creating the new record. If record numbers for the module are set to be auto-generated, the system creates the number as it would when any new record is created. Otherwise the user is prompted to enter the record number and any other required information.

Once a module is set up in the Copy Records view of the Module Administration (Forms) module, make sure that the users also have the Copy Record responsibility that is specific to the module. After these settings are complete, users with the responsibility can use the Copy Record action for the module that was configured.

Database Tables

When records are copied, the system creates temporary tables. When the copying process is complete, the system discards this data in the database recycle bin. To prevent data accumulation on the database, DBAs should clean out the database recycle bin periodically.

Special LOVs View

Construct Custom List of Values queries in the Special Lists of Values view. Enter a List of Values Name and Title, Group, and Record Group. At that point you can enter a detailed Description and write the actual SQL query which can be as simple or sophisticated as required.

Custom Menus View

Use this view to define up to 20 custom menu items for each module. The menu items that you create can open reports or custom API calls that you develop using SQL and SAPI Triggers. Once you complete the fields in this form, the system adds a menu item to the menu bar of the selected module. To users, the added menu items look like the standard options, but will add greater accessibility and functionality specific to your organization.

Users must have each individual module's custom menu option listed in their Responsibility profile in order to view or have access to any custom menus that appear in that module.

The Synergen Application Programming Interface (SAPI) is an empty library delivered with the application that is used to customize forms processing. It contains "hooks" into the core application that allow users to build form level triggers.

Custom Menus Field Descriptions

Form - Identifies the specific form where the new Menu item will appear in the Search Options window.

Menu Title - The text entered in this field will appear exactly as entered on the menu bar. Enter an '&' sign in front of the letter you want to designate as the hot key.

Sequence Number - If you enter multiple menu items number them according to the order that you want them to appear. Submenu options appear on the menu in the order of the sequence numbers, not in the order that they appear on the Custom Menu view.

Submenu Title - The text entered in this field will appear exactly as entered as a submenu of the Menu Title that you create. Enter an '&' sign in front of the letter you want to designate as the hot key.

Display? - Make sure that fields requiring validation have the "Invalid" indicator box checked rather than the "Check" indicator. The "Check" box should only be used for fields that will never be null. If a field is null and the "Check" indicator is set to "Y" the Check process will cause an error which will disrupt correct processing of the record duplication. For example, fields such as Asset ID, Department and Area on Work Requests or Work Orders should always be set to "Invalid".

Click this check box to make the Custom menu appear on the menu bar. This check box is a convenient way to add and remove custom menu items from the menu bar without having to physically enter and delete them from the Custom Menus view.

Type - You can create a custom menu item that performs a CUSTOM function or that links to a REPORT.

Action - The action field determines what the custom menu item will do when you select it from the menu bar. It should reference a specific report code or a custom API routine.

Use Primekeys in Where Clause? - If this check box is marked the "where" clause passed to the report is built using primekeys on the form. Primekeys limit or filter the results generated on a report. If this option is turned off (not checked) and the selection block is not specified in Reports Administration, reports will run automatically with no where clause. This may result in large reports that contain thousands of records which may crash your system.

To Create a Custom Menu

1. **Open the Module Administration - Forms module in the Administration subsystem and highlight the form to which you want to add a custom menu.**
2. **Select Custom Menus from the Views list.**

   If a custom menu has already been created for that form, that record opens. If no custom menu has been created, a new record opens.

   If a Menu Title already exists you can edit it if necessary.
3. **Enter a Menu Title.**
4. **Click an empty line in the grid or click New.**
5. **Enter a sequence number for the menu option that you are adding.**
6. **Enter the Submenu Title.**
7. **Check the Display? box if you want the menu option to appear on the custom menu when you save the record.**
8. **Select a Type from the pull-down menu.**

   You can select either Report or Custom. Custom executes another action which you must specify. Refer to Custom Menu Actions for more information.

   If you set the type as "REPORT" the value for the Action should exactly match the report name. This must be a report which exists within the system. Set the type as "CUSTOM" to launch a custom action, file, or other executable when the menu item is selected. If you need to access custom reports set the type as "CUSTOM."
9. **Specify the Action to be performed.**
10. **Check the Use Primekeys in Where Clause? check box if you want the Where Clause passed to the report built using primekeys on the form.**
11. **Click Save.**

    The system saves the record and updates the custom menu.

Granting Access to Custom Menus

Granting Access to Custom Menus

Users must have a module's custom menu option listed in their Responsibility profile in order to access any custom menus that appear in that module. Please refer to the chapter on Responsibilities for more information on how to add a function to a responsibility.

Custom Menu Actions

Configure the SAPI_TRIGGER "WHEN-CUSTOM-MENU-ACTION" to call the custom action that you define in the Action field of the Custom Menu screen. The event trigger coming in would look like the following example, where "<menu action name> is the value defined in the Action field.

```
WHEN-CUSTOM-MENU-ACTION<menu action name>
```

Configure SAPI to launch a custom form using syntax similar to the following: (The example is for illustration purposes only. The path must be changed to a location appropriate for your environment.)

```
     PROCEDURE SAPI_TRIGGER (
     if trigger_name_in = 'WHEN-CUSTOM-MENU-ACTION-LAUNCH2343' then
     web.show_document('C:\Files\Custom_Report_2343.xls');
)
```

Use similar syntax to launch an external application, web page, document, or other customized content that you want to access from the custom menu.

Refer to the General System Setup section for a full list of SAPI Triggers.

Selection Order By View

The Selection Order By view allows you to determine the default Order By options on the Search Options page in a given module.

Form Name

Identifies the specific form where the Order By list will appear in Search Options.

Seq (sequence)

The items on the Order By list will be listed numerically according to this number. Search Results will be ordered by the first value on the list if no other selection is made. If you want to change the default value, change the sequence numbers to making the desired default first on the list.

Label

The text in this field shows how the items will appear on the list on the Search Options page.

Used

This field indicates which form fields should be used to sort the forms when they open.

Used (Check Box)

If this box is checked the field will be used on the Order By list. These check boxes are a convenient way to add and remove fields from the Order By list without having to physically enter and remove them from the Selection Order By Views list.

Block Name

Indicates the specific block where the fields on the Order By list can be found.

Sys

A check in this box indicates that the field is required by the system.

Duplicate View

The Duplicate view allows you to set up specific parameters for when you use the Duplicate function in a module. By setting this view correctly you can prevent unnecessary or incorrect information from being copied over when you duplicate a form.

Clear (check box)

If this check box is marked the system will clear this field when you use the duplicate function.

Invalid (check box)

If this check box is marked for a field, the system automatically marks the data in the field as invalid. When you save the record the system checks to see if it is actually invalid and then re-validates it or returns an error message if it is no longer valid. This function helps you to avoid duplicating inaccurate information.

Check (check box)

If this check box is marked for a field, the system verifies that the information to be copied is valid. For example, if you are copying a Blanket Contract and the Check check box is marked for the field Blanket Contract Number, the system will verify that the Blanket Contract number to be copied is still valid and used in the system before it uses it on the new form. This function helps you to avoid duplicating inaccurate information.

Replace with Value

In this field, you can enter the data that you would like to have entered in place of the data from the original form. You can not put in default values for system required fields.

Allow Duplicate View

The Allow Duplicate View allows you to set up blocks on a form that can be duplicated and validated. Select the block name and check the check boxes next to that block name depending on whether or not you want duplication to be allowed for that block and you want it to be validated immediately after it is duplicated.

Modules Administration - SIA

The Modules Administration - SIA module mirrors the functionality of the corresponding forms module, but for modules based on the Synergen Internet Architecture (SIA) rather than Oracle forms. Using the Modules Administration - SIA module, you can define required or secondary required fields and setup default values that the system will automatically insert into new records.

You can search the SIA Modules Administration module using field names or field sources. The field source is the page or view where the field is found. If you don't know a specific field name or field source, you can find out by right clicking any field in an SIA module to see the field name, field label, and field source information.

The Results window opens listing all records that meet your search criteria. If you search without entering specific information, the Results window opens listing all records.

Fields

Field Source and Field Name

Field Source identifies page or view where the field is located. Field name identifies the name of the field on the source.

Default Value

If you enter a Default Value the system will automatically insert the specified value into the field when a new record is created. Users can overwrite default values if necessary.

System

When the System box is checked, the system requires the field be populated before the record can be saved. When the System box is checked, the Required box is automatically checked as well and you cannot modify either setting.

Required

Check the Required box if you want to make the field a required field. If you set a field as required, users must enter a value into the field before the system will allow them to save the record.

Secondary Fields View

Click the Secondary Required link to designate a second field to be a required field when the current field is populated. If secondary field information has been entered, the Secondary Fields Data page opens showing that information. If secondary field information has not been entered, click the New icon to open an empty data page.

Enter the Second Field Name and mark the Required check box. Check the Required box to make the field a required field.

Enter a Field Value to indicate that the second field is required only when the first field contains the specific value shown. Leave the Field Value blank if the second filed is always required so long as the first field is populated with any value.

Special Lists of Values

You must use a database development tool such as SQL Plus, SQL Developer, or Toad to access the database and create Special LOVs in SIA.

How to Create a Special List of Values in SIA

Create a custom list of values by identifying the field in the XT_NAMEDQUERY table then entering an override SQL statement in the XT_NAMEDQUERY_OVERRIDES table.

1. **Identify the QUERY_NAME for the field that you want to modify.**
   Open the module, right click the field containing the LOV, select Properties and note the Named Query value.

   In this example, select the Crew field in the Daily Schedule module and note that the Named Query value = HeaderCrew.

2. **Open your database development tool and locate the XT_NAMEDQUERY table.**

   ```
   SELECT
      CONTEXT, QUERY_NAME, QUERY_SQL
   FROM SYNERGEN.XT_NAMEDQUERY Tbl
   WHERE CONTEXT = 'DailySchedule' AND QUERY_NAME = 'HeaderCrew'
   ```

   Generally, the CONTEXT = the module name.

3. **Copy the contents of the QUERY_SQL field and paste it into a text editor such as Notepad.**
   Example: select c.crew, c.crew_desc, b.key_value from sa_crew c, sa_rule_key b where c.plant = ? and b.plant (+) = c.plant and b.rule_id (+) = 'DEFAULT BACKLOG GROUPS' and b.key_name (+) = c.crew and upper(crew) like upper(?)||'%' order by c.crew

4. **Edit the SQL as necessary to produce the desired results.**
   For this example, try removing all instances of the join statement '(+)' to yield a list which only shows Crews with a populated backlog group.

   Example: select c.crew, c.crew_desc, b.key_value from sa_crew c, sa_rule_key b where c.plant = ? and b.plant = c.plant and b.rule_id = 'DEFAULT BACKLOG GROUPS' and b.key_name = c.crew and upper(crew) like upper(?)||'%' order by c.crew

   You can modify the statement in any way, however the bind variables (indicated by a question mark '?') MUST remain in the same location as in the original statement.

5. **Locate or create the corresponding ENTITY_NAME and NAMEDQUERY in the XT_NAMEDQUERY_OVERRIDES table.**
   This is where you will enter the modified SQL to change the LOV.

   ```
   SELECT
      NAMEDQUERY, ENTITY_NAME, QUERY_SQL
   FROM SYNERGEN.XT_NAMEDQUERY_OVERRIDES Tbl
   WHERE ENTITY_NAME = 'DailySchedule' AND NAMEDQUERY =
   'HeaderCrew'
   ```

6. **Enter the modified SQL into the QUERY_SQL field and commit.**
7. **Return to the module to see the results.**
   The system displays applicable errors if the SQL does not work properly.

Custom Menu Actions

Modules built with the SIA architecture use custom actions to mimic the custom menu functionality available in Forms based modules. Custom actions can be used to call a URL or an Oracle report. This section describes the basic configuration of custom actions.

Note: SAPI calls are not yet supported and no user interface is available to maintain custom actions.

The term 'custom actions' is used rather than 'custom menus' because the links appear on the left sidebar of the module under the standard Actions list.

Database Table

Custom actions are defined in XT_CUSTOM_ACTION.

Column	Description
plant	plant code; prime key
custom_action_id	action id; prime key
custom_action_type	action type: REPORT or URL
custom_action_title	a short description that is displayed on toolbar
command_string	for action type REPORT, this value is the report name
	for action type URL, this value is the URL itself
pass_pks	pass prime keys from page (Y or N)
non_pk_names	column names delimited by commas
custom_action_desc	longer description of action
module	SIA module name (i.e. "DailySchedule")
page	the page where action should show up... normally "Data"
display	display action (Y or N)
display_order number	order to display action on custom action bar
created_by	audit fields here and below
created_date	
last_update_user	
last_update_date	

Defining Custom Actions

Until a user interface is available, the new table can be populated only from TOAD or the SQL prompt. Clients wishing to use custom actions should contact SPL for assistance. There are no configuration items (business rules, responsibilities, etc.) associated with custom actions other than the XT_CUSTOM_ACTION table. If actions are defined in the table, they will appear in the specified module for all users having access to the module.

When defining custom actions, you can specify whether to pass the prime keys with the call and/or any non-prime keys you identify in the action.

The following example illustrates how to define a custom action in the Daily Schedule module to call report 44, passing prime keys from the Daily Schedule header to the report:

```
plant = 01
custom_action_id = DAILYSCH1
custom_action_type = REPORT
custom_action_title = My Report
command_string = S_RPT044
pass_pks = Y
module = DailySchedule
page = Data
display = Y
display_order = 1
```

This example defines a second custom action in the Daily Schedule module to call to a URL (www.google.com) without passing prime keys:

```
plant = 01
custom_action_id = DAILYSCH2
custom_action_type = URL
custom_action_title = Google
command_string = http://www.google.com
pass_pks = N
module = DailySchedule
page = Data
display = Y
display_order = 2
```

A final example defines a third custom action in the Daily Schedule module to call a report, passing both prime keys and a non prime key (schedule_type) from the Daily Schedule header:

```
plant = 01
custom_action_id = DAILYSCH3
custom_action_type = REPORT
custom_action_title = My Report with Type
command_string = S_RPT044
pass_pks = Y
non_pk_names = schedule_type
module = DailySchedule
page = Data
display = Y
display_order = 3
```

Converting Custom Menus to Custom Actions

When appropriate, existing custom menu information can be copied from Forms to produce custom actions in the specified SIA module. Below is an example of a migration script to copy data from the SA_FORM_CUSTOM_MENU table for the Weekly Schedule module to the XT_CUSTOM_ACTION table for similar support in the Daily Schedule module.

```
    INSERT INTO XT_CUSTOM_ACTION
    (
     PLANT,
     CUSTOM_ACTION_ID,
     CUSTOM_ACTION_TYPE,
     CUSTOM_ACTION_TITLE,
     COMMAND_STRING,
     PASS_PKS,
     NON_PK_NAMES,
     MODULE,
     PAGE,
     DISPLAY,
     DISPLAY_ORDER,
     CREATED_BY,
     CREATED_DATE,
     LAST_UPDATE_USER,
     LAST_UPDATE_DATE
    )
    SELECT DISTINCT
     cm.PLANT,
     'DAILYSHD' || ' ' || cm.SEQUENCE_NO "CUSTOM_ACTION_ID",
     cm.MENU_TYPE "CUSTOM_ACTION_TYPE",
     cm.HEADER_MENU_LABEL || ' ' || cm.MENU_LABEL
    "CUSTOM_ACTION_TITLE",
     cm.MENU_CALL "COMMAND_STRING",
     cm.MENU_PRIMEKEYS "PASS_PKS",
     '' "NON_PK_NAMES",
     'DailySchedule' "MODULE",
     'Data' "PAGE",
     cm.MENU_DISPLAY "DISPLAY",
     cm.SEQUENCE_NO "DISPLAY_ORDER",
     cm.CREATED_BY,
     cm.CREATED_DATE,
     cm.LAST_UPDATE_USER,
     cm.LAST_UPDATE_DATE
    FROM
     SA_FORM_CUSTOM_MENU cm,
     SA_FORM_NAMES fm
    WHERE
     cm.FORM_NAME = fm.FORM_NAME
     and fm.FORM_NAME = 'WKLYSCHD'
    AND 0 = (select count(*) from XT_CUSTOM_ACTION where PLANT =
    cm.PLANT and CUSTOM_ACTION_ID = 'DAILYSHD' || ' ' ||
    cm.SEQUENCE_NO)
    /
    commit
/
```

Charts and Metrics

Responsibilities

Use the Responsibilities module to add the Charts and Metrics that you want users to have access to. Charts are displayed in the home page and in the Charts module. Metrics are displayed in the home page and the Filtered Metrics module.

Filtered Metrics

While a Metric represents a single queried or calculated value, a Filtered Metric further defines that value. With a Filtered Metric, the data used to calculate the metric value is filtered by specific values. Once granted access, users can see Filtered Metrics on their home page and in the Filtered Metrics module. Metrics and Filtered Metrics are managed within the Metrics Administration module. An administrator can create both Metrics and Filtered Metrics before granting access to each Filtered Metric to specific Responsibilities. Access to the Metrics Administration module must also be granted through the Responsibility module.

Charts

The following types of charts can be added to the system and accessed from the Chart list or Home Page:

- Charts based on Pivot Lists
- Charts based on spreadsheet data, that do not query the Oracle Utilities Work and Asset Management database
- Spreadsheet data with no charts

See the Charts Administration User Guide for information on adding these charts.

Maximum Chart Records

Modify the max_chart_records property in the config. properties file to limit the number of records to use when querying data for the charts (interactive, detailed charts and generation of thumbnail images). If the number of records retrieved is too large, the system may error before displaying the chart. This is because there may not be enough memory or resources on the application server to handle the data. There is no recommended value for this setting because it will depend on the environment. If a value is not specified, the default value will be 20,000 records. If the number of records continues to be a problem, the underlying views that provide the data should be modified to include additional filters to limit the data.

You can find the config.properties file located here:
\ora10gMID\j2ee\OC4J_INSTANCE\applications\INSTANCEsynergen\INSTANCEsynergen\config directory

where "INSTANCE" is the name of the OC4J instance entered by the installer.

The property is called "max_chart_records" in that file.

Charts Home Directory

IIS is used to generate thumbnail images representing the charts at specific points in time. The reason why thumbnail images are used instead of the actual chart is to reduce the time it takes the home page to display. By using thumbnail images instead of the actual charts, we reduce the number of queries performed before the home page is displayed.

To generate the charts, the IIS website should use the following Oracle Utilities Work and Asset Management directory as the "home directory". This directory contains the necessary programs to generate thumbnails:

The Charts IIS Server home directory must point to

\ora10gMID\j2ee\OC4J_INSTANCE\applications\INSTANCEsynergen\INSTANCEsynergen\charts directory

where "INSTANCE" is the name of the OC4J instance entered by the installer.

The permissions for synergen\charts\data should be set so that all users have write permissions.

1. **On the Application Server, select Start>Programs>Administrative Tools>Internet Information Services (IIS) Manager.**
2. **Navigate to and expand the Web Sites folder.**
3. **Right click the web site defined for the Synergen 6 Chart Service and select Properties.**
4. **Select the Home Directory tab.**
5. **For the Local Path, browse to and select the charts folder.**
6. **Click the OK button.**
7. **Click the Apply button.**
8. **Click the OK button.**

Notes on Charts in Office 2007

The chart functionality in Oracle Utilities Work and Asset Management used the Microsoft Office Excel PivotList and Chart features to display interactive charts. These features were based on the Office Web Components (OWC) that were a part of Office XP and 2003 versions. The current version Microsoft Office, 2007, no longer includes this feature. To continue to use this functionality, customers must use older versions of the Office Web Components as described below:

1. To register a new chart with the application the client machine that creates the chart HTML file must be using either Office XP or Office 2003. These are the only versions of Microsoft Office that publish PivotTable and PivotChart HTML files.
2. To view interactive charts within the application, the client machine must have the XP version of Office Web Component installed. This is an ActiveX control that can be installed in conjunction with Office 2003 or 2007). The OWC ActiveX controls are available at these Microsoft pages:

   Office 2003 Web Components Download:

   http://www.microsoft.com/downloads/details.aspx?FamilyID=7287252c-402e-4f72-97a5-e0fd290d4b76&amp;DisplayLang=en

   Office XP Web Components Download:

   http://www.microsoft.com/downloads/details.aspx?FamilyID=982b0359-0a86-4fb2-a7ee-5f3a499515dd&amp;DisplayLang=en
3. The IIS ASP server that generates supporting Chart Thumbnails must have the Office XP OWC ActiveX control described above.

Description of Missing Features in Office 2007

When installing Office 2007 why are the Office Web Components removed from my system?

Other than in Project Server, the Microsoft Office Web Components will no longer be shipping in Microsoft Office. Because of this change the components are removed from your system during the installation of Office 2007 if they were installed by a previous version of Microsoft Office. Users who need the Office Web Components can download and install them online from the Microsoft Download Center.

HTML is no longer a supported Excel publishing format.
Previous versions of Excel allowed for publishing of Excel files to HTML with interactivity using the Microsoft Office Web Components. With the introduction of Excel Services, Microsoft has shifted focus to services instead of HTML. As part of this focus, Microsoft has removed support for saving HTML files with interactivity using the Office Web Components.

More information
http://office.microsoft.com/en-us/products/FX101633871033.aspx

Batch Processes

Generate All Chart Images

sdbp_generate_all_chart_images (job_in, plant_in); - Generates chart images used on home page. Run Now is not an option on the Actions list for this batch process. If you want to regenerate the thumbnail chart image on the spot, open the Charts Administration module, locate the chart on the list, and click the Regenerate Image button.

Generate Charts

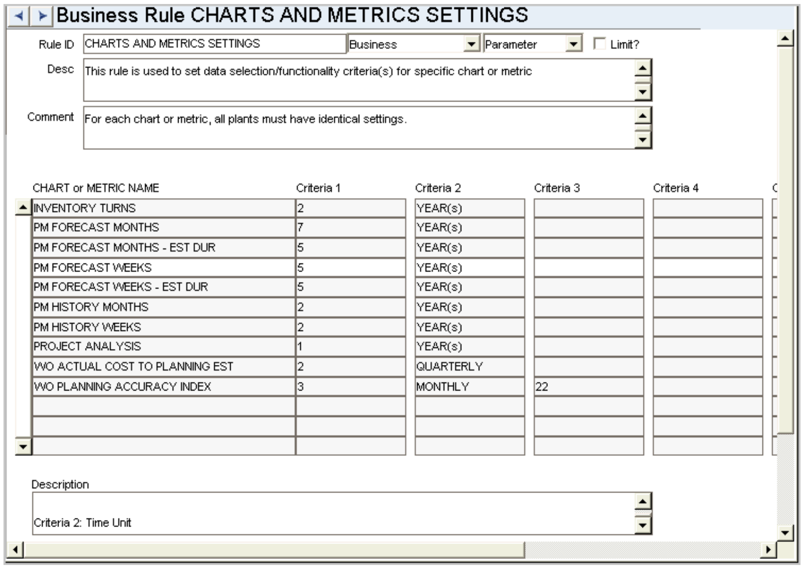
sdbp_generate_chart_image (job_in, chart_id_in, plant_in) - Generates specific chart images. For the chart identifier, this procedure uses only the number following "s_cht" in the chart name (for example, 140 is the chart_id for chart s_cht140). Run Now is not an option on the Actions list for this batch process. If you want to regenerate the thumbnail chart image on the spot, open the Charts Administration module, locate the chart on the list, and click the Regenerate Image button.

Generate Metrics

sdbp_metric_handler (job_in, plant_in); - Processes all metrics to get current data.

Business Rules

Charts and Metrics Settings Rule



Business Rule CHARTS AND METRICS SETTINGS

Rule ID: CHARTS AND METRICS SETTINGS | Business | Parameter | ☐ Limit?

Desc: This rule is used to set data selection/functionality criteria(s) for specific chart or metric

Comment: For each chart or metric, all plants must have identical settings.

CHART or METRIC NAME	Criteria 1	Criteria 2	Criteria 3	Criteria 4
INVENTORY TURNS	2	YEAR(s)		
PM FORECAST MONTHS	7	YEAR(s)		
PM FORECAST MONTHS - EST DUR	5	YEAR(s)		
PM FORECAST WEEKS	5	YEAR(s)		
PM FORECAST WEEKS - EST DUR	5	YEAR(s)		
PM HISTORY MONTHS	2	YEAR(s)		
PM HISTORY WEEKS	2	YEAR(s)		
PROJECT ANALYSIS	1	YEAR(s)		
WO ACTUAL COST TO PLANNING EST	2	QUARTERLY		
WO PLANNING ACCURACY INDEX	3	MONTHLY	22	

Description: Criteria 2: Time Unit

This rule is used to control the amount of data retrieved by charts to help prevent overloading the systems with memory issues. For each chart or metric, all plants must have identical settings.

Chart or Metric Name

The name for the chart or metric.

Criteria

CRITERIA 1 sets the number of complete prior time units (Months, Quarters or Years) that will be retrieved. Current partial data is included.

CRITERIA 2 sets the type of time units to retrieve (Months, Quarters or Years) .

CRITERIA 1 and **CRITERIA 2** must be used together to determine the overall time-frame for data retrieval. For example, if you want to retrieve the current partial data plus the data for 4 prior months, enter '4' for Criteria 1 and 'Monthly' for Criteria 2. Even if the chart does not physically show months quarters or years, Criteria 2 must be set to indicate the type of time unit to retrieve.

For each chart or metric, all plants must have identical settings. If multiple settings are set for different plants - the minimum value will be used. The maximum time period for which data can be retrieved is 5 years.

CRITERIA 3 - 7 may define additional settings for the chart or metric. Refer to the description for more information.

Installation Parameters

CHART_INVENTORY_VALUATION

Ex. ALL STOREROOMS

This value is used to restrict returned records for Inventory Valuation chart. Set the key value to a specific storeroom code to restrict chart by that specific storeroom, or leave value as 'ALL STOREROOMS' to retrieve data for all storerooms.

CHART THUMBNAIL GENERATION

ON/OFF

Allows administrators to enable or disable the display of chart thumbnails. Disabling this feature can save system resources to speed up processing. Set to ON to display thumbnails and OFF to not display thumbnails. The default setting is ON. The SIA Application Server must be restarted whenever this parameter is modified.

CHART THUMBNAIL PROCESSING

ON/OFF

This Installation Parameter is used to manage the thumbnail processing in the on-line application. This controls whether chart thumbnails are displayed on metrics pages or in the charts views.

This parameter works in conjunction with the BATCH JOB MANAGER business rule which contains a batch job to regenerate the chart thumbnails on a regular basis. This batch job is called "GENERATE ALL CHART IMAGES" and should be disabled if you choose to turn this parameter OFF.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Display Trusted Sites Link

Displays the link: "Add Chart Server as a Trusted Site" to the Charts List page (not the Chart Admin page) giving the user the option to add the current server to the list of trusted sites.

Report Administration Module

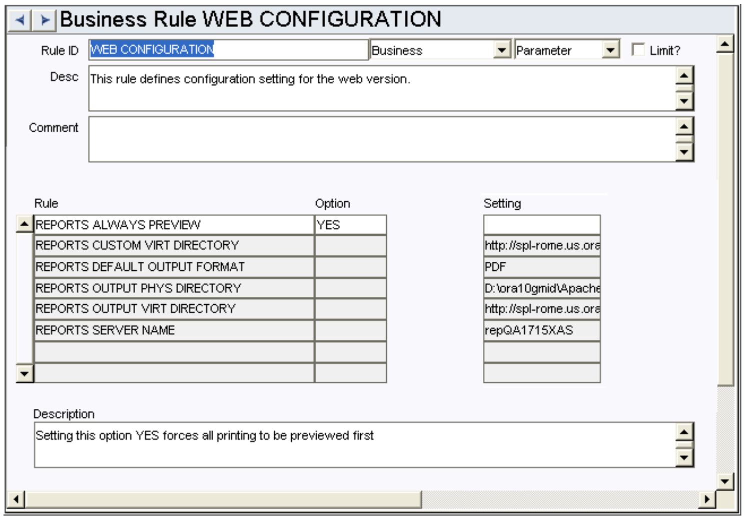
The Report Administration module is used to access and run existing reports as well as to add custom reports.

In order to run, each report must have a Report Administration record with a unique Report ID. The Report Administration record includes fields to describe and classify the report and locate the report's executable files.

Please refer to the Custom Reports section for information on creating custom reports.

Business Rules

Web Configuration Rule



Business Rule WEB CONFIGURATION

Rule ID: WEB CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule defines configuration setting for the web version.

Comment:

Rule	Option	Setting
REPORTS ALWAYS PREVIEW	YES	
REPORTS CUSTOM VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS DEFAULT OUTPUT FORMAT		PDF
REPORTS OUTPUT PHYS DIRECTORY		D:\ora10gmid\Apache
REPORTS OUTPUT VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS SERVER NAME		repQA1715XAS

Description: Setting this option YES forces all printing to be previewed first

Define web configuration settings.

Rule, Option, and Setting

Enter YES or NO in the Option column for each of the rule keys. Also enter the file path or format (as appropriate) in the Setting column.

REPORTS ALWAYS PREVIEW - Setting this option YES forces all printing to be previewed first. Reports are converted to a .pdf file and opened in Adobe acrobat.

REPORTS BARCODE FONT - Enter a value in the setting field to specify the font to be used on reports that include a barcode field. The font that is entered should be available in your system fonts. You can find fonts by searching the internet for "Free Barcode Fonts."

REPORTS CUSTOM VIRT DIRECTORY - This is the web server virtual directory to run the Oracle Reports CGI program for the web version.

REPORTS DEFAULT OUTPUT FORMAT - Select the default format for all reports. Settings include TXT (Delimited text), PDF (Adobe Portable Document Format) and RTF (Rich Text Format).

REPORTS OUTPUT PHYS DIRECTORY - This is the web server physical directory to put report output for the web version. To enable e-mailing of Purchase Orders to Vendors, allow network access to the directory defined under this rule key. Once this access is allowed, identify this network share in the E-Mail Configuration Business Rule under the key PO EMAIL FILE LOCATION.

REPORTS OUTPUT VIRT DIRECTORY - This is the web server virtual directory to retrieve report output for the web version.

REPORTS SERVER NAME - This is the name of the reports server for the web version.

UPLOAD DIRECTORY - This is the directory where files are stored when they are uploaded to support receiving multiple trackable stock items.

Custom Reports

If your organization requires a report that is not already provided, you can add a custom report. You can create custom reports using Oracle Report Builder tools.

Refer to topics for Custom Menus and Custom Menu Actions for information on how to make custom reports more easily accessible for users after they are created.

Naming Conventions

All Report IDs that begin with "S_" are reports built and maintained by Oracle Utilities Work and Asset Management.

Reports

Standard reports are named with the following format: S_RPTxxx.

Custom reports are named with the following format: C_abcxxx.

Example:
Report 35 is named *S_RPT035.rdf*.
Report 1 for Mike is named *C_MIK001.rdf*.

Views

Each report has an associated view that is named the same as the report. Views are named with the prefix "sv_" for standard reports and "cv_" for custom reports.

Example:
The view for standard report 35 is named *SV_S_RPT035*.
The view for custom report 1 for Mike is named *CV_C_MIK001*.

Creating a New Custom Report

Creating a new custom report involves the following steps:

1. Find the Information for the Report
2. Create a View for the Report
3. Build the Report
4. Build Selection Screens for the Report
5. Make the Report Available to Users

Find the Information for the Report

Before you start designing or building a custom report, it is important to locate and identify the information needed in the report. For example, for a a report related to assets, you would need to know the Asset ID, Plant, Account numbers and so on. Furthermore, you need to determine which tables and columns are needed for the report.

You might want to identify an existing report as a starting point. From here you can copy pertinent information or the view needed to build the report. Beyond using an existing report, there are a few sources that can be used to find where the information that you need to build the report lies in the database.

Locate Information Using various Database Resources

Oracle Utilities Work and Asset Management

About Item - If you know where data is entered in Oracle Utilities Work and Asset Management, navigate to the field and select "About Item" under the "Help" menu. For text items, this should give you the column and table name of the item (if there is no table name listed, it means the field is not a "base table item", the field itself exists in another table and is just referenced for the current form).

Oracle Data Dictionary - Select Oracle Data Dictionary from the Admin menu. This will let you search by table, column, and column type. Thus, you can search for something like %ASSET% for all tables that contain the word "Asset". (The % is the recognized wildcard character.)

SQL

The layout of all of the Oracle Utilities Work and Asset Management Tables and Views can be accessed through the Schema Browser window.

Query behind the View

To find the query that a view is based on, use the following code:

```
SELECT TEXT
  FROM USER_VIEWS
 WHERE VIEW_NAME = 'VIEW_NAME'
```

If you do not own the view, try

```
SELECT TEXT
  FROM SYS.ALL_VIEWS
 WHERE VIEW_NAME = 'VIEW_NAME'
   AND OWNER = 'OWNER'
```

Create Report Executables

To add a custom report using Oracle Report Builder, you first need to create the actual report executable (".RDF" or ".REP") files in Oracle. You can either modify existing report executable files (located in the Oracle Utilities Work and Asset Management directory) or create new ones. If you modify existing Oracle Utilities Work and Asset Management files, first duplicate and rename the files to ensure that future updates will not overwrite your modifications.

Create a View for the Report

All selection criteria must be in the view. The view should be made so that order by functions will work. For example, if all the information is stored in the view and grouping occurs in the report, the grouping function will override the order by function.

An example of a script for creating the view follows. When creating custom views use the temblordb database and sign on with the company's username and password.

```
create or replace view cv_c_splxxx as
```

```
 (select asset_id, attribute1
  from sa_asset)
/
```

Privileges and synonyms must also be granted and created. If you do not do this, you will not be able to test the final version of your report in Oracle Utilities Work and Asset Management.

```
CREATE PUBLIC SYNONYM CV_C_RPT000 FOR OWNER.SV_S_000SPL;
GRANT SELECT ON CV_C_SPL000 TO SUPERUSER;
```

Additional Notes

Using an existing view with this new report is not recommended. The view for the older report might change and disable your new report.

Build the Report

This section provides details about building the report in Oracle Report BuilderBI Publisher Reports.

Regardless of which report building tool you use, the same basic steps are required:

1. Create the Report File
2. Design the Data Model
3. Design the Layout

   It is best to make sure that your data model is complete before creating your layout model.

Create the Report File

If a portrait layout is required, use s_rpt000.rdf as a template by copying it to the name of your new report. If a landscape layout is required use s_lan000.rdf. By using these templates, all the fonts will be set up correctly and the report will look similar to existing reports. The reports also have triggers written to work with the report selection form.

Design the Data Model

1. Use the Data Model tool in Oracle Report Builder to create the query of the report from your view.

   This main query should follow several constraints:

   - The query should not *select* *. The columns to be included should be listed, rather than using the * wildcard. This is important because if any additional items are added into the view at a later time, the report may no longer work.
   - The main query should not join any other tables with the report's view. This is important because it will interfere with the Oracle Utilities Work and Asset Management AI (described in number 3 below) for the reports will interfere with the table join.
   - There should be no *where* or *order by* clause. These will be replaced with &USER_WHERE_CLAUSE and &USER_ORDER_BY.

   An example of a valid query is shown in Query 1, which queries all assets and their components.

```
select PLANT, ASSET_RECORD_TYPE, ASSET_ID, ASSET_DESC,
       PROCESS_NO, ASSET_TYPE, ASSET_CLASS, BUILDING,
       POSITION, LOCATION, COMPONENT_ID, COMPONENT_ID_DESC,
       MANUFACTURER_CODE, MANUFACTURER_DESC,
 MANUFACTURER_MODEL_NO, SERIAL_NO
  from SV_S_RPT089
&USER_WHERE_CLAUSE
```

```
&USER_ORDERY_BY
Query 1: Q_Asset
```

- A group is used for grouping objects in a query. If the columns you chose have grouping, you can click and drag the fields outside of the group box. For instance, a query might have a natural grouping of components by asset. That is, each asset can have multiple components. Thus, we can move the component information into a component group.

  Note: When the main query is grouped, the order by is set by the data model and will override the selection screen order by.
- If you need additional information in the report that you cannot create in the view, you can create more queries and link them to the main query. This functionality comes in handy if a table must be selected from more than once (limitations in creating a view).
- It is also possible to add a query in a column formula. This is done by selecting the *Formula Column* tool and adding a procedure like the following:

```
begin
   select column_name
       into variable
       from table_name
       where table_name.plant = :plant
         and other_join_condition
    return variable;
exception
    when others then return null;
end;
```

Design the Layout

If you are not completely familiar with the Oracle Report Builder, use the report wizard to do the initial layout. You'll save yourself a lot of time and work. Even you already have a layout and do not know why it does not lay out correctly, it may a good idea to reformat it using the layout wizard.

- If you need a landscape orientation, change the width and height under the properties of the report.
- Repeating frames must have a group associated with them. You can have repeating frames within repeating frames. For example, you can have one parent repeating frame whose source is G_Asset. Within this repeating frame, would be other repeating frames that hold G_Component, G_Process, and G_Building.
- Use normal frames to enclose "similar" objects. Repeating frames will often overwrite (as in lie on top of) other repeating frames, especially if the text fields are allowed to expand. If you place the repeating frame that is being overwritten in a normal frame, the repeating frame will then start printing under it instead of on top of it.
- Show child groups and their headings only when they exist. For example, if we are displaying equipment and it's components, we do not want to show the headings for the components when the asset has no components. To do this, we need to create a counter and a format trigger.

  You can use a "counter field" in the main group within the Data Model to count the number of components that the asset has.

You can use a “format trigger” to control whether the object prints if the count is zero. This will be a PL/SQL statement that tells the object to print itself only if there are fields to be printed. The format trigger is found on the property palette of almost every item and is indicated as a small “P” in the Layout Editor of the Object Navigator. Create the format trigger on the frame that encloses the headings and the group’s repeating frames.

The PL/SQL code for the format trigger follows:

```
begin
  if :cs_component_counter = 0 then
    return (FALSE);
  else
    return (TRUE);
  end if;
end;
```

Build Selection Screens for the Report

In order to use the custom report you must also create a custom selection screen to access the report. Creation of the selection screen requires the following steps:

1. Set up the Environment
2. Test the Environment
3. Build a Custom Selection Screen
4. Create/Add a Custom Selection Screen to the Custom Report

Set up the Environment

In order to develop the report selection screens, you will need the following:

1. Oracle Form Builder
2. Oracle Utilities Work and Asset Management files:

   Libraries

   SRPI.PLL- Library of common procedures for reports

   Object Master for Inheritance

   RPTMSTR.FMB- Master form for referencing common objects

   Report Selection Screen Forms

   RPTTMPL8.FMB- Template for custom selection screens for reports

Test the Environment

If you have the above in a separate directory path for development, you will need to have at least the following, so that you can run the application and test your work:

MAIN.FMX

MAIN.MMX

REPORTS.FMX

RPTCOM.MMX

RPT_LIST.FMX

RPT_OPT.FMX

All Oracle Utilities Work and Asset Management Icon Files *.ICO

Build a Custom Selection Screen

Oracle Utilities Work and Asset Management provides the following modules to build custom selection screens for your custom reports:

RPTMSTR.FMB - Master form for referencing common objects

RPTTMPL8.FMB - a template form for adding custom reports. This form should be copied to a new name (preferably beginning with the letters 'RPT' and modified to include custom reports. The new form must be added to code table 95 (without the file extension), so that it can be referenced in the Location field in the Report Administration module.

SRPI.PLL - Library of common procedures for reports

Create/Add a Custom Selection Screen to the Custom Report

To add the custom selection screen to the custom report you must connect to the oracle database and then complete the following:

Add New Objects for the Custom Selection Screen

1. Create a window template with respect to the following:
    - General – Name. Naming convention of a window is RPT_{report name}, where {report_name} is the file name of the report.
    - Functional – Title
    - Functional – Primary Canvas: will need to come back to this attribute after setting up your new canvas.
2. Create record groups with respect to the following:
    - General – Name. Naming convention being database field_name + numeric portion of the report name, i.e. DEPARTMENT_001. Proper naming of fields will pay off when you start adding multiple reports to the same report selection form (at a glance, you will be recognize records associated with a report).
    - Functional - Record Group Query – your select statement goes here.
3. Create the appropriate lists of values and record groups for items that need them. You can copy already existing lists of values to save some time but you must make sure that there is an individual list of values for every item that needs one. Do not share lists of values or record groups. Change the following:
    - General – Name. Naming convention being database field_name + numeric portion of the report name.
    - Functional - Title
    - Functional - Record Group, map to appropriate record from step 2
    - Functional – Column Mapping Properties: will need to come back to this item after step 5
4. Create a canvas for your items to display on with respect to the following:
    - General – Name. Naming convention of a window is RPT_{report name}, where {report_name} is the file name of the report.
    - Physical – Window, map to values created in step 1
    - Now that you have a canvas, go back to Window (step 1) and assign value to Function - Primary Canvas.
5. Create the appropriate datablocks.

Naming convention of a block is RPT_{report name}, where {report_name} is the file name of the report. Each block is a selection menu for a report.

Each report must have its own block in the selection form. The reports template has a block called REPORT_TEMPLATE from which you can copy common objects and properties.

For all items, change the following:

- General - Name (use same name from your view)
- List of Values (LOV) – List of Values, Map to value from step 3
- Physical – Canvas, Map to value from step 4
- Open the canvas (F2) and position the items.
- Make sure 'ORDER_BY_TEXT', 'B_RUN_REPORT' and all other items map to the correct canvas.

6. Go back to the list of values and change Functional - column mapping properties to reflect the appropriate datablock items.
7. Complete a full program compile, build and executable, disconnect and save the form when you are done. It is very important to disconnect before saving as the form can become corrupted over time if you don't.

Make the Report Available to Users

Once you have created the appropriate report executable files in Oracle, you need to make the custom report accessible within Oracle Utilities Work and Asset Management. Adding a custom report to the system is a three-step process.

1. Add custom selection form to code table 95
2. Add the custom report to the reports list
3. Add the custom report to a responsibility

Add custom selection form to code table 95

This is only when you install the first custom report using this selection form).

Add the custom report to the reports list

1. Open the Report Administration module.
2. Click New.
3. Enter a Report ID.
4. Enter the Selection Block.

   The Selection Block is the report block name (i.e. RPT_{report name}).
5. Select the Location from the list of values.

   This list is controlled by Code Table 95. The Location is the form name of the report (without the extension).

   You may first need to add the appropriate form name to Code Table 95 of the Code Table and Codes module to make it available to the list.
6. Enter Type, Group, and Description.
7. Select the Restrict from Upgrade check box if needed.

   This prevents the record from being modified by subsequent releases.

8. Click Save.

   The system saves the Report Administration record and adds the custom report to the reports list. To have access to the report, you need to add the Custom Report to a Responsibility.

Add the custom report to a responsibility

Anyone with the appropriate responsibility can then run the custom report.

Responsibility Module

Users cannot see or do anything in the system - aside from working in the home page - unless they have at least one Responsibility. Responsibilities determine the standard Oracle Display, Select, Insert, Update and Delete privileges described in the security matrix. They also determine which parts of the system are available to users all the way down to the level of specific fields.

There are several Responsibility Types. Under each type, individual items control objects that fall into these categories.

As a default all of the objects are prohibited to a user unless there are specifically allowed to the user by a responsibility. Responsibilities are assigned to users in their user profiles.

Responsibilities cannot be extended to custom programs accessed through the In House menu in the Administration subsystem.

Responsibility Types

CHARTS TYPE - Controls the charts that are available to the user.

COPY RECORDS TYPE - Controls which modules include the Copy Record action on the Actions list. Modules must also be configured for copying in the Copy Record view of the Module Administration (Forms) module. In order for the Copy Record action to appear on the Actions list in any module you must have BOTH the Responsibility and at least one table added to the Copy Record view of the Module Administration - Forms module.

CUSTOM MENUS TYPE - Controls which custom menus the user can see throughout the system. Most modules have a custom menu function that can be turned on or off when you create custom menus in that module. In general, the naming structure for these Functions is “[module name] - Custom Menu”.

FILTERED METRICS TYPE - Controls the filtered metrics that are available to the user .

FUNCTION TYPE - Controls access to views, actions, wizards, and other task based parts of the system.

MODULE TYPE - Controls which modules the user can view.

REPORTS TYPE - Controls which reports users can view or print.

Furthermore, by checking the Display, Select, Insert, Update, and Delete check boxes, you can determine whether or not users with the given responsibility have the power to perform any one of these tasks on any one of the items, where applicable.

The nature and structure of your organization will determine how you use responsibilities. Beyond a few generic delivered responsibilities, each organization establishes its own responsibilities to meet its unique needs. Responsibilities can be based on specific tasks or job titles and they can be layered. The strategy that your organization uses will be determined by such considerations as business practices, managerial and supervisory responsibilities, level of effort to set up and maintain the system, personnel turn-over, etc.

EXAMPLE:

A sample responsibility structure might have 3 levels. ADMIN, LEVEL1, and LEVEL2.

You would assign the ADMIN responsibility to any users that you want to have complete power over the system. You would then include every Module, Function, and Report in that Responsibility, and check all of the boxes under Display, Select, Insert, Update, and Delete. Users granted this Responsibility would then have complete access to everything in the system.

You would assign the LEVEL1 Responsibility to users with moderate access to the system. These users may have access to all Modules and Reports, but you may choose to limit the types of functions available to these users or prevent them from deleting certain objects by leaving the Delete check boxes unchecked.

The LEVEL2 Responsibility might be assigned to users with very limited access to the system. You might even have a LEVEL2-Work and a LEVEL2-Purch and only assign modules and functions that pertain to very specific job functions to these Responsibilities.

As you can see, the Responsibility module affords tremendous flexibility and control over the system. You should work closely with your Oracle Utilities Work and Asset Management representative to develop your Responsibility matrix so that it works to the maximum benefit of your organization.

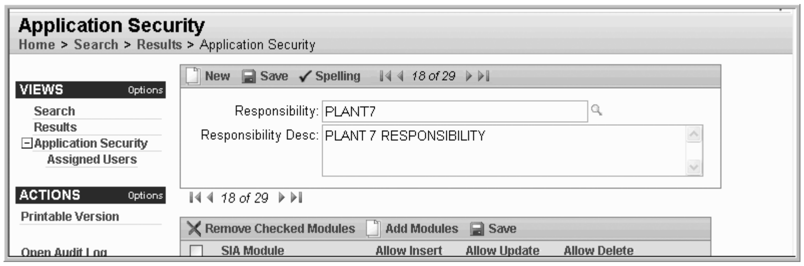
Copy Record

RESPONBL - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Application Security

The Application Security module works with the Responsibility module to control the allowed privileges to specific objects in the system. Only modules that are launched within Internet Explorer are controlled by settings in the Application Security module. Modules that are accessed in Oracle Forms are controlled by the Responsibility module.



Responsibility: PLANT7

Responsibility Desc: PLANT 7 RESPONSIBILITY

Once you create a responsibility name, enter a description and save, you can click the Add Modules icon to build the ability list. When you select this icon, the system allows you to filter the list of modules by subsystem and/or module.

Place a check in the box next to each ability that is available to the responsibility. Place a check in the Allow Insert, Allow Update, or Allow Delete columns, based on which of these activities you want to permit for the responsibility. It is assumed that any abilities for the module that are left unchecked are not available to the responsibility. If you do not want users to have access to the module at all, do not include that module in the abilities list. This means that the module will not appear in the Application Map lists or on any menus.

Once modules are added to the active ability list you can click the Pages link to control which pages in each module the user with this responsibility has access to. If no pages are configured, the system defaults to have all available pages accessible to the responsibility.

Place a check in the box next to each ability that is available to the responsibility. If only the Available check box is selected, users have the insert, update, and delete abilities. If a check is placed in the Allow Insert, Allow Update, or Allow Delete columns, it is assumed that any abilities for the page that are left unchecked are not available to the responsibility.

The fields screen works in the exact same way as the Pages screen.

Select Assigned Users from the Views list to assign a responsibility to several users. The alternative is to assign responsibilities by selecting Responsibility from the Views list in the User Profile module and adding them on a user by user basis.

Sequence Numbers Module

Throughout the system many numbers - such as ID Numbers - must be unique because they identify their record. The system always verifies that these record identifying numbers are unique, however, you can also set the system to generate the numbers to save users from taking the time to create unique numbers. Using the Sequence Numbers module you can control the format of sequence numbers as well as whether the number will be provided by the system.

If a module is not specifically referenced in the Sequence Numbers module, the default is to have the record identification number for that module created by the user.

When you adjust the settings in this module the changes only apply to the Plant that you are logged on to.

Fields

Table Name

The Table Name indicates the table that contains the number and is entered and maintained by Oracle Utilities Work and Asset Management.

Sequence Number

If the system generates the number, you can determine if there is a starting number, as well as what that number is to be. For example, entering 100 would cause the system to begin using the number 100, then 101, 102, etc.

Prefix

If the system generates the number, you can determine the prefix that it will use. If you enter “YY” the system will use the current year. Any other letters or numbers entered will be represented as their value. For example, entering “B” would cause generated numbers to begin with “B”.

If at some point you would like to change or omit the prefix, you can do so by entering a new prefix or deleting the existing prefix. Make sure that the new value has not already been used or else you will create duplicate numbers and the system will generate an error.

Length

The length indicates the maximum number of characters that can be used in the number. The length indicates the size of the number that can be used in the table, not necessarily what the field will show on screen.

System

A check in the System check box indicates that the sequence number should be system generated. Uncheck the box to allow users to create the number.

User Profile Module

In User Profile you can set up and maintain profile information specific to each user. Each time a user signs on to the application, the system checks this module for default information such as which printer location to use as a default, which Plant Code to use as a default, and other information that is used throughout the system.

Each username granted access to the application must have a User Profile record to use the system. Usernames and Employee Numbers entered in the User Profile must be unique for each user. No duplicates are allowed. The Employee Number returns information from the Employee module (Resource subsystem). Default Information consists of a Name used to print on documents and reports, Printer (of choice), and Plant Code (used when signing on to the system).

Administrator Access to User Profile Records

Access to all User Profile records is controlled with password authority . Only users granted authority can access all User Profile records, otherwise users may only access their own User Profile (based on username).

Administrator access to user profile information, enrolling users, and changing user passwords can be summed up with the following:

- User Profile "administrators" are indicated by assignment of the SYNERGEN PASSWORD responsibility function.

  Having this responsibility function allows a user to see User Profile records other than their own and to have the ability to insert, update, or delete user profile information.

- Altering of passwords requires ALTER USER database privileges in addition to the SYNERGEN PASSWORD responsibility function.

  Having this database privilege allows administrators to access the change password features.

- The security function, SYNERGEN PASSWORD, and three database privileges are required to use the User Enrollment Wizard to create database users.

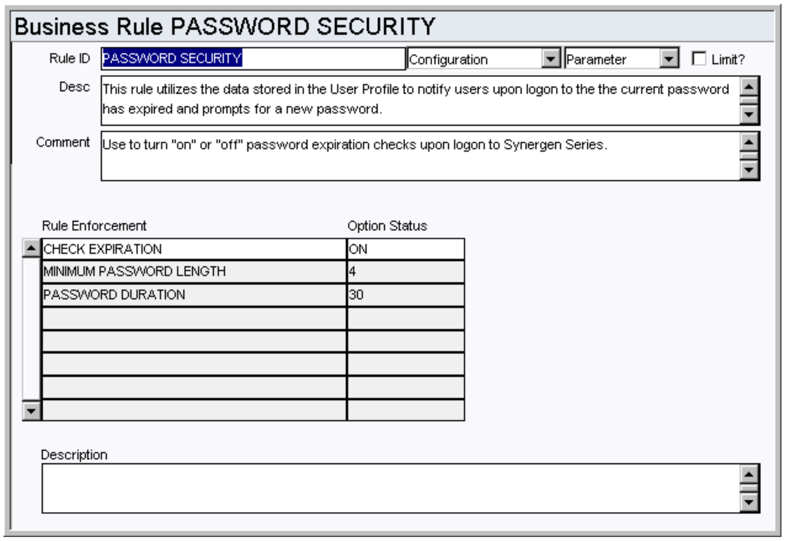
  A database admin page is displayed in the Enrollment Wizard if an administrator has the following database privileges, CREATE USER, GRANT ANY ROLE, CREATE TABLE, and SELECT ANY TABLE.

Selecting the User Enrollment action from the User Profile module launches the User Enrollment wizard.

Note: Administrators may want to disable the Insert, Update and Delete abilities for most blocks in the User Profile module for most modules. In particular, the Responsibilities view should be disabled to prevent users from adding responsibilities from within their own User Profile record. If you choose to turn off these abilities for all blocks in user profile, make sure that they are at least enabled for the Change Password block.

Business Rules

Password Security Rule



Business Rule PASSWORD SECURITY

Rule ID: PASSWORD SECURITY — Configuration — Parameter — ☐ Limit?

Desc: This rule utilizes the data stored in the User Profile to notify users upon logon to the the current password has expired and prompts for a new password.

Comment: Use to turn "on" or "off" password expiration checks upon logon to Synergen Series.

Rule Enforcement	Option Status
CHECK EXPIRATION	ON
MINIMUM PASSWORD LENGTH	4
PASSWORD DURATION	30

Description

Utilizes the data stored in the User Profile to notify users upon logon to the system, the current password has expired. It also prompts for a new password.

Use to turn on or off password expiration checks upon logon to the system.

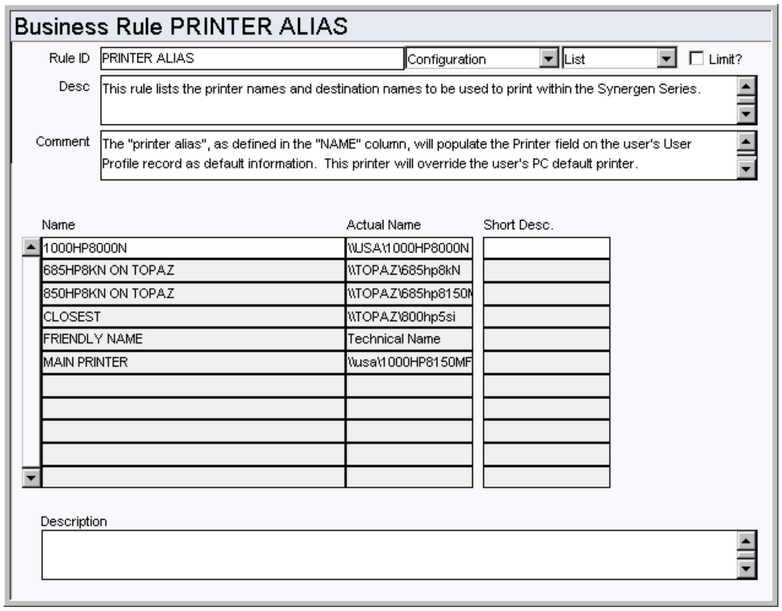
Rule Enforcement and Option Status

CHECK EXPIRATION - When this is ON, users' passwords are checked against the EXPIRATION_DATE stored in SA_USER_PROFILE. If the password has expired the system prompts for the creation of a new password. If the OPTION STATUS value for this rule key is set to OFF, the system will not check the expiration date and will not prompt for a new password once the current password expires.

MINIMUM PASSWORD LENGTH- Default is 8. A value must be entered in this field if you have password reset enabled.

PASSWORD DURATION - This value determines the number of days that the password is valid. If the CHECK EXPIRATION rule key is set to YES, the system prompts the user to create a new password on the expiration date indicated in the Password Administration view of the User Profile module. When the password is reset, the system sets the expiration date ahead to the number of days entered in this rule key. For example, if the Password Duration is 30 and you change your password on May 1, the system sets the new Expiration Date to May 31.

Printer Alias Rule



Business Rule PRINTER ALIAS

Rule ID: PRINTER ALIAS | Configuration | List | ☐ Limit?

Desc: This rule lists the printer names and destination names to be used to print within the Synergen Series.

Comment: The "printer alias", as defined in the "NAME" column, will populate the Printer field on the user's User Profile record as default information. This printer will override the user's PC default printer.

Name	Actual Name	Short Desc.
1000HP8000N	\\USA\1000HP8000N	
685HP8KN ON TOPAZ	\\TOPAZ\685hp8kN	
850HP8KN ON TOPAZ	\\TOPAZ\685hp8150	
CLOSEST	\\TOPAZ\800hp5si	
FRIENDLY NAME	Technical Name	
MAIN PRINTER	\\usa\1000HP8150MF	

Description:

Indicate the printer names and destination names to be used to print within the system. The printer alias , as defined in the NAME column, will populate the Printer field on the user's User Profile record as default information. This printer will override the user's PC default printer.

NAME - The name field establishes an “alias,” or user-friendly name for the printer indicated in the Actual Name column. This value will populate the Printer field on the User Profile record as the default (up to 30 characters).

ACTUAL NAME - Enter into the “ACTUAL NAME” column the printer name that a specific operating system would recognize (up to 30 characters).

If you have many different operating systems (i.e. Windows95, WindowsNT, etc.) printing to one printer, the printer name is stored in the “ACTUAL NAME” column. This printer name can be found in the Control Panel for the operating system under Printers.

You must enter the printer name in the following format: \\<server name>\<actual printer name> (e.g. \\MYSERVER\685HP8KN if “685HP8KN” is the actual printer name), OTHERWISE THE PRINTER WILL NOT BE RECOGNIZED. If the printer name changes, you only need to change the Business Rule setting, not all of the User Profile records.

SHORT DESC. - Enter into the “SHORT DESC.” column a description of the printer (up to 30 characters).

GS DEVICE - If the PRINT ATTACHMENTS TO PRINTER rule key in the ATTACHMENT PRINT CONFIGURATION Business Rule is set to ON, enter into the “GS Device” column the Ghostscript device name that applies to the printer. An example of this would be “LaserJet” for an HP LaserJet printer. To find a valid list of printer device names, please refer to your Ghostscript documentation.

Batch Processes

Synchronize User - sdbp_clean_user_n_user_profile;

Synchronizes records in SA_USER and SA_USER_PROFILE by inserting missing user records for matching user profiles, setting a default plant if not specified, and deleting user records without matching user profiles.

Copy Record

USERPROF - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

When the Copy Record action is selected from the Actions list in the User Profile module, the system opens a wizard that walks you through the process of copying a user profile. The first screen of the wizard asks for the username and includes three check boxes which represent the three business rule authorities that might be associated with the user profile (Timekeeping Authority, Procedures Authority, Work Request Authority) with the applicable authorities checked. The user can use this value or choose uncheck the boxes to exclude the authority from the new profile. The screens that follow depend upon the boxes that are checked here. If a box is not checked the corresponding screen to configure the authority is not displayed. Follow the screens in the wizard to copy the user profile record. Additional adjustments can be made on the resulting record when the wizard is complete.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Activate Pins

Grants the administrative ability to activate locked PIN numbers in the User Profile module. A PIN becomes locked after a determined number of unsuccessful attempts to enter a PIN number.

Synergen Password

Allows users the ability to select, insert or update user profile records.

User-Defined Fields Module

Define user defined fields for modules where they are needed.

Use of this module requires technical understanding of the database. Only your Database Administrator (DBA) or technical level users will be able to create User Defined Fields. However, this discussion is presented for anyone who may deal with planning and implementing User Defined Fields.

At it's simplest, a User Defined Field can be a basic information holder containing numeric or alphanumeric information that does not interact with the rest of the system. At a more complex level, information from a User Defined Field on one record type can be copied to another record type – for example, a routing number on a Requisition that is passed on to the Purchase Order. User Defined Fields can also be used for customizing reports.

Please refer to the user guide topic on User-Defined fields for more detailed information on setting up these fields.

User-Defined Fields on Related Tables

When a UDF is defined for a table that has a related table, the same UDF definition needs to be applied for the related table. For example, if ATTRIBUTE3 at SA_WORK_ORDER_TASK is redefined with NUMBER datatype and length 8, ATTRIBUTE3 at SA_WORK_HISTORY_TASK should also be redefined as NUMBER datatype, length 8.

The following shows a list of tables that have related tables and have UDFs:

- SA_WORK_ORDER <=> SA_WORK_HISTORY
- SA_WORK_ORDER_MATERIAL <=> SA_WORK_HISTORY_MATERIAL
- SA_WORK_ORDER_PERMIT <=> SA_WORK_HISTORY_PERMIT
- SA_WORK_ORDER_TASK <=> SA_WORK_HISTORY_TASK
- SA_PURCHASE_ORDER <=> SA_DELIVERY
- SA_PURCHASE_ORDER_ITEM <=> SA_DELIVERY_PO_ITEM

UDF Setup Window

The User Defined Fields Setup window determines the table assignment, basic appearance and validation (checking against a list of values) of the fields. Once you have created a new record here, you can use the Setup Table Definition view to further define how the new User Defined Field will function.

The window includes a field for the affected table name and ten line items for the ten available Attribute fields.

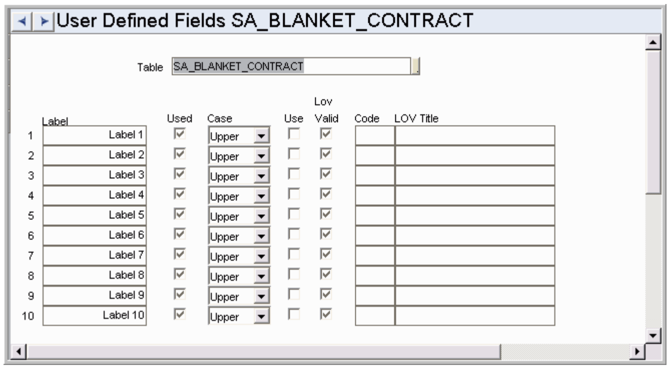


Table SA_BLANKET_CONTRACT

	Label	Used	Case	Lov Use	Lov Valid	Code	LOV Title
1	Label 1	☑	Upper	☐	☑		
2	Label 2	☑	Upper	☐	☑		
3	Label 3	☑	Upper	☐	☑		
4	Label 4	☑	Upper	☐	☑		
5	Label 5	☑	Upper	☐	☑		
6	Label 6	☑	Upper	☐	☑		
7	Label 7	☑	Upper	☐	☑		
8	Label 8	☑	Upper	☐	☑		
9	Label 9	☑	Upper	☐	☑		
10	Label 10	☑	Upper	☐	☑		

UDF Setup Window

Table Definition

Once you have created a User Defined Fields Setup record to indicate that a window (i.e. table) should display User Defined Fields, and have defined the basic characteristics for the User Defined Fields, you can use the Setup Table Definition view to make sure that the database has been prepared to accommodate the new or modified fields. These options define the data characteristics of the fields and how they behave within the database structures and processing.

The window includes fields to make these refinements as well as a display that confirms your selections. Since these selections change the actual structure of the table and the data it allows, the window provides a set of check boxes and a button to control when and how the updates are made.

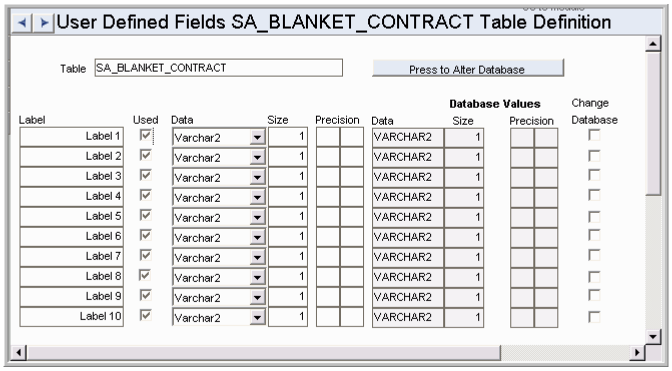


Table SA_BLANKET_CONTRACT

					Database Values			Change
Label	Used	Data	Size	Precision	Data	Size	Precision	Database
Label 1	☑	Varchar2	1		VARCHAR2	1		☐
Label 2	☑	Varchar2	1		VARCHAR2	1		☐
Label 3	☑	Varchar2	1		VARCHAR2	1		☐
Label 4	☑	Varchar2	1		VARCHAR2	1		☐
Label 5	☑	Varchar2	1		VARCHAR2	1		☐
Label 6	☑	Varchar2	1		VARCHAR2	1		☐
Label 7	☑	Varchar2	1		VARCHAR2	1		☐
Label 8	☑	Varchar2	1		VARCHAR2	1		☐
Label 9	☑	Varchar2	1		VARCHAR2	1		☐
Label 10	☑	Varchar2	1		VARCHAR2	1		☐

Table Definition view

Determining Which Windows Show UDFs

You must know the name of the table (rather than the window name) that will include the UDF.

To Determine which Tables Have UDF (Attribute) Columns using the Oracle Data Dictionary

You can find additional tables by using the Oracle Data Dictionary module. This module displays other useful information about tables and fields as well.

1. **Open the Oracle Data Dictionary from the Admin menu.**
2. **Enter ATTRIBUTE1 in the Column Name field.**
3. **Select an Order By radio button.**

   This selection determines how the returned will be sorted.

4. **Select Search from the Actions list or press F8.**

   The system lists all of the tables that contain columns called Attribute1 (if Attribute1 is available in a table, then Attributes2 through 10 are also available). The list will include existing Custom views (beginning 'CV_') and interfaces ('SAIF_') in addition to tables ('SA_').

Once you have determined that a table contains Attribute columns, allowing you to place a User Defined Field on the associated window, you must insert a new record describing how the User Defined Field will look and function. This is done in the User Defined Fields (UDFs) module.

Workflow Groups Module

Using the WorkFlow Groups module you can build and maintain lists of users to simplify sending messages to groups of users within the system. Once a group is established it users can use it in a manner very similar to Distribution Lists in e-mail programs.

Fields

Group Owner

Only the Group Owner can use a given WorkFlow Group and the associated List of Values is limited to your username and Public.

User Name

The system automatically supplies your Username as the Group Owner. If you select this option, only you will be able to use the Group.

Public

If you select Public as the owner, any user that can sign onto the plant can use the list. No matter who the Group Owner is, the user must still establish the WorkFlow Group in their User Profile to access the list.

Group Name

The Group Name displays on the List of Values for the User field of the Message window, along with the first few words of the group description.

Description

The Description is for information purposes only, viewed only from within this module and on the User field of the Message window.

People in Group and People Not in Group

Taken together, these two columns include all the Users for the plant. Clicking the appropriate button between the columns moves names from one column to the other.

The Add Button

If you highlight a name in the People Not in Group column and click this button, the system moves the name to the People in Group column.

The Add All Button

If you click this button without highlighting a name the system moves all the remaining names from the People Not in Group column to the People in Group column. Note: When you use either of the All buttons the system automatically saves the changes for you and the Cancel button cannot be used to undo the change.

The Remove Button

If you highlight a name in the People in Group column, and click this button the system moves the name to the People Not in Group column.

The Remove All Button

If you click this button without highlighting a name the system moves all the remaining names from the People in Group column to the People Not in Group column. Note: When you use either of the All buttons the system automatically saves the changes for you and the Cancel button cannot be used to undo the change.

Copy Group

You can duplicate a group by selecting Copy Group from the Actions list.

Chapter 3

Resource Subsystem

Account Structure Module

The system displays and maintains account information as though the system had been designed with your specific account structure in mind.

Define your organization’s account structure in the Account Structure module. Once you have defined the structure the system displays all Account Number fields using the defined structure. The system also uses the defined structure to support the Account Help window, which can be used to assist in finding a particular account by building it segment by segment.

Caution: After you have defined the Account Structure, careful consideration should be given before changing it because you also have to modify all associated data and any interfaces that use your Account Numbers.

Fields

Segment Name

The Segment Name indicates the label that the system will show on the Account record for that segment. The Account records can be found in the Account module in the Resource subsystem.

Length

The Length field indicates how many characters will be in the segment. This is the maximum number of characters, but if a user enters less than the maximum, the system still displays the positions for the other characters as blanks.

Use Code Table?

Checking this box will cause the associated code table (251-260) to be required by the person setting up the account. If the box is not checked, the LOV will still allow the user to select from the code table, but the use of the values in the LOV is not mandatory.

Required?

Placing a check in the Required check box indicates that the segment must be entered.

Delimiter Character and Position Indicator

You can use the Delimiter field to determine the character shown between segments of the account number. Placing a check in the check box indicates that the delimiter is to be shown whether or not the preceding segment contains a value. For example, with a three-segment account number using dashes as the delimiter characters, the system would show 1- -3 if there was no data in the second segment and both check boxes were checked. The system would show 1 -3 if there was no data in the second segment and only the second check box was checked.

The lines between the Required check boxes and the Delimiter Character field do not represent anything and should be ignored.

Code Tables

Code Table 251 to Code Table 260: ACCOUNT SEGMENT 1 to 10

Define values associated to each account segment defined in the Segment Name fields of the Account Structure module. For example, if Segment 1 is labeled Personal ID then the description for Code Table 251 would be “Personal ID” and the code list would show the Personal ID’s that should show on the List of Values in the Account module. These IDs can then be used to create the accounts.

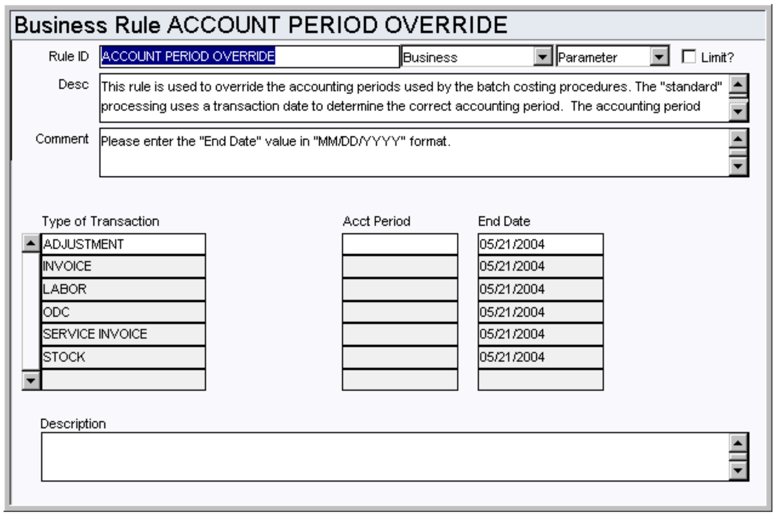
These are DBA type Code Tables, and great consideration should be taken before modifying them.

Accounting Periods Module

Fiscal or Accounting Periods are defined in the Administration subsystem. No gaps in date ranges are allowed in the input of Accounting Periods. Completion of the entries in the Accounting Periods module is mandatory for End of Period Processing to capture, roll up and reset period accounting information.

Business Rules

Account Period Override Rule



Business Rule ACCOUNT PERIOD OVERRIDE

Rule ID: ACCOUNT PERIOD OVERRIDE | Business | Parameter | ☐ Limit?

Desc: This rule is used to override the accounting periods used by the batch costing procedures. The "standard" processing uses a transaction date to determine the correct accounting period. The accounting period

Comment: Please enter the "End Date" value in "MM/DD/YYYY" format.

Type of Transaction	Acct Period	End Date
ADJUSTMENT		05/21/2004
INVOICE		05/21/2004
LABOR		05/21/2004
ODC		05/21/2004
SERVICE INVOICE		05/21/2004
STOCK		05/21/2004

Description:

Enter account periods that should be overridden during batch costing procedures.

Standard processing uses a transaction date to determine the correct accounting period. The accounting period that brackets the transaction date is used by default. This rule allows you to enter an accounting period to override the standard. If the costing procedures find an entry in this rule the accounting period related to the type of charge will override the standard processing. This is important at the end of accounting periods or accounting years so costs can be “back-dated” into the previous period.

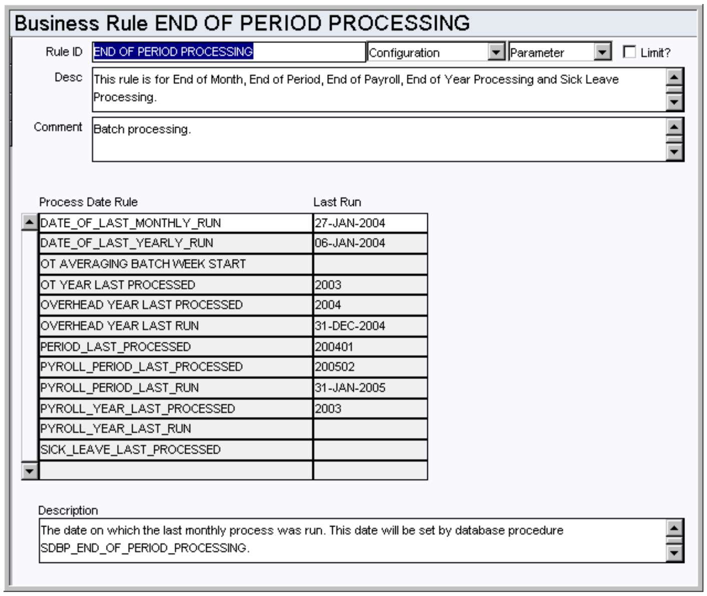
To override the accounting period, enter a new account period year and month for each type of transaction. If no entry is made or if the period year and month are blank, then standard processing is used.

Pay Periods Module

Pay Periods are defined in the Administration subsystem. No gaps in date ranges are allowed in the input of Pay Periods. Completion of the entries in the Pay Periods module is mandatory for Pay Period Processing to capture, roll up, and validate timekeeping pay periods.

Business Rules

End of Period Processing Rule



Business Rule END OF PERIOD PROCESSING

Rule ID: END OF PERIOD PROCESSING
Configuration
Parameter
☐ Limit?

Desc: This rule is for End of Month, End of Period, End of Payroll, End of Year Processing and Sick Leave Processing.

Comment: Batch processing.

Process Date Rule	Last Run
DATE_OF_LAST_MONTHLY_RUN	27-JAN-2004
DATE_OF_LAST_YEARLY_RUN	06-JAN-2004
OT AVERAGING BATCH WEEK START	
OT YEAR LAST PROCESSED	2003
OVERHEAD YEAR LAST PROCESSED	2004
OVERHEAD YEAR LAST RUN	31-DEC-2004
PERIOD_LAST_PROCESSED	200401
PYROLL_PERIOD_LAST_PROCESSED	200502
PYROLL_PERIOD_LAST_RUN	31-JAN-2005
PYROLL_YEAR_LAST_PROCESSED	2003
PYROLL_YEAR_LAST_RUN	
SICK_LEAVE_LAST_PROCESSED	

Description: The date on which the last monthly process was run. This date will be set by database procedure SDBP_END_OF_PERIOD_PROCESSING.

The End of Period Processing rule controls End of Month, End of Period, End of Payroll, End of Year Processing and Sick Leave Processing. This rule sets the system to review when batch processing was last done by period and by date.

It is reccommended that the rule is run based on your set accounting periods. The job processes records for the period that is PRIOR to the current period, so we recommend midnight on the day following the last day of the accounting period. For example, if the period ends on July 15, set the job to run on July 16, 12:00am.

Click here for detailed processing steps.

Process Date Rule

DATE_OF_LAST_MONTHLY_RUN - the date End of Month Processing was last run. The SDBP_END_OF_PERIOD_PROCESSING batch process first reads the date of the last montly run then writes a message to the Job Log record the value.

DATE_OF_LAST_YEARLY_RUN - the date End of Year Processing was last run. The date is set and maintained by the database procedure SDBP_END_OF_PERIOD_PROCESSING.

OT AVERAGING BATCH WEEK START - a system maintained field for the start date of the week used by the database procedure SDBP_AVERAGE_OVERTIME.

OVERHEAD YEAR LAST PROCESSED - The last year for which Overhead Regulatory Account cost allocation was done.

OVERHEAD YEAR LAST RUN - The date on which the last yearly Overhead Regulatory Account cost allocation was run.

PERIOD_LAST_PROCESSED - the period year and number End of Period Processing was last run. Periods are defined and maintained by you in the Accounting Periods module in the Administration subsystem.

PAYROLL_PERIOD_LAST_PROCESSED - the period year and number Payroll Period Processing was last run. Periods are defined and maintained by you in the Pay Periods module in the Administration subsystem.

PYROLL_PERIOD_LAST_RUN - the date Payroll Period Processing was last run. The date is also set and maintained by the database procedure SDBP_POST_TIMESHEET.

PYROLL_YEAR_LAST_PROCESSED - the year End of Year Payroll Period Processing was run. The year is set and maintained by the database procedure SDBP_CREATE_NEW_ LEAVE_YEAR.

PYROLL_YEAR_LAST_RUN - the date End of Year Payroll Period Processing was run. The year is set and maintained by the database procedure SDBP_CREATE_NEW_LEAVE_ YEAR.

SICK_LEAVE_LAST_PROCESSED - the date sick leave was last processed. This date is set and maintained by the database procedure SDBP_MONTHLY_SICK_LEAVE.

Last Run
Shows the date and time that the batch procedure was run last.

End of Period Processing Analysis

The following describes the End of Period processing steps.

1. **Reads the DATE_OF_LAST_MONTHLY_RUN from the END OF PERIOD PROCESSING business rule.**
2. **Writes a message to the Job Log as "Value for DATE_OF_LAST_MONTHLY_RUN is : " followed by the value from the business rule.**
3. **Reads the PERIOD_LAST_PROCESSED from the END OF PERIOD PROCESSING business rule.**
4. **Writes a message to the Job Log as "Value for PERIOD_LAST_PROCESSED is : " followed by the value from the business rule.**
5. **Reads all records from sa_accounting_periods where the period_year||period_month is greater than the value found in PERIOD_LAST_PROCESSED (step 4). These records are returned ordered by period_year and period_month, so the next month to process will be at the top of the list.**
6. **Reads the data from the first record (specifically end_date) found in the list in step 5.**
7. **If the end_date is greater than the current date, then the process assumes the period is still current. The process stops and a message is written to the log, "Period is not ready to be processed.".**
8. **The process check to see if the storeroom usage records have already been created for some reason. If storeroom usage records are found for the period being processed, the process stops and a message is written to the job log, "Period has already been run.".**

9. The next record in the list is read and the "period_year" for the two records is compared. If the years are different then the process sets a flag to note that year end processing should also be run. See step 12.
10. Reads all records in the Storeroom table that have "month to date usage" quantities greater than 0. If then loops over each record processing steps 11 and 12.
11. For the current Stock Item, the Month to Date Usage is set to 0, and the activity indicator is set to Y.
12. A Storeroom Monthly Usage record is created that contains the Month to Date Usage value from the Storeroom record found in step 10.
13. If the year end processing should be run, based on the information processed in step 9, then step 14 is performed.
14. For all records in the storeroom, the Year to Date Usage is set to 0, and the activity indicator is set to Y.
15. Updates the END OF PERIOD PROCESSING business rule, PERIOD_LAST_PROCESSED key, with the current period_year||period_month just processed.
16. Updates the END OF PERIOD PROCESSING business rule, DATE_OF_LAST_MONTHLY_RUN key, with sysdate.
17. If the year end process was run, the END OF PERIOD PROCESSING business rule, DATE_OF_LAST_YEARLY_RUN key, is updated with sysdate.
18. The final message "Total Number of Records Processed: xxxx" is written to the job log.

Department Module

Fields

Department and Description

Department names are user defined. Use the description field to further explain the code.

Parent and Child Department Fields

These fields should be filled in if applicable. If you enter a Parent Department on a Department record, that Department will appear as a Child Department on the record for the Parent entered.

Charts

S_CHT126 - Departmental Costs Summary

A comparison of Budgeted costs to Actual costs for the current year and the previous year. The data can be filtered further by plant, department and area.

Copy Record

DEPT- COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Area Module

Fields

Department and Description

Enter the code for the Department that the Area is a division of. The system populates the description field from the Department module.

Area and Description

Create a unique Area code and enter a description of the designated Area.

Copy Record

AREA - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Account Module

Fields

Account Number

The system creates the Account Number after you enter values for each segment.

Department and Area Fields

Select the Department and Area that the asset relates to.

Reference ID Field

If your account structure does NOT require that employees charge time against the account when they enter their time, the Reference ID is optional. Reference ID allows you to associate the Account Number with a unique ID that you can use elsewhere in the system to retrieve the entire Account Number automatically. The Reference ID code must be unique to the account.

Typically, the system does not require a Reference ID number to enter an account number. However, in the Timekeeping module, the system requires a Reference ID when employees charge time against an account. Make sure that you configure Reference IDs for accounts that will be charged for labor.

Work Request Route Field

You can enter a default approver route in this field. If the DEFAULT APPROVER FROM ACCOUNT value in the Work Request Processing Business Rule is set to ON, the system will use the approval route entered in this field when a new Work Request is created and no approval route is entered. This saves anyone who is creating a Work request from having to know the appropriate title for the approval route. The approval route can always be overwritten on the Work Request if necessary.

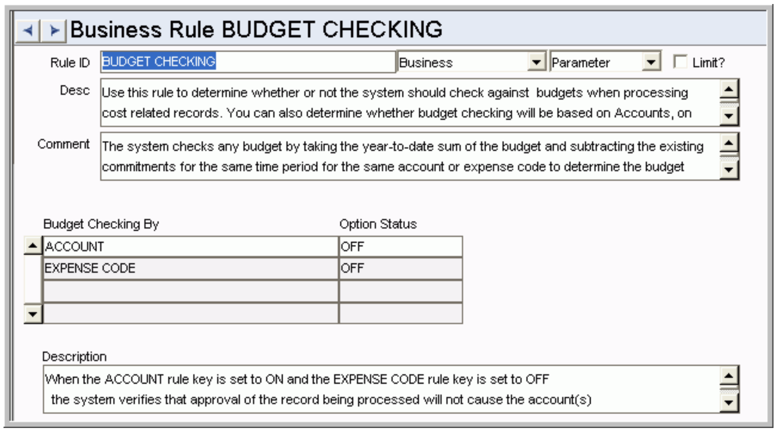
The Work Request Route field is controlled by a List of Values that the system builds using the Approval Limits module of the Administration subsystem.

Budget Type Field

The Budget Type field indicates how Budget values will be calculated for this Account number. Select Annual to use costs incurred within the current calendar year to calculate the budget and committed costs for the account. Select Lifetime to use all costs every incurred against the account to calculate the budget and committed costs for the account.

Business Rules

Budget Checking Rule



Business Rule BUDGET CHECKING

Rule ID: BUDGET CHECKING | Business | Parameter | ☐ Limit?

Desc: Use this rule to determine whether or not the system should check against budgets when processing cost related records. You can also determine whether budget checking will be based on Accounts, on

Comment: The system checks any budget by taking the year-to-date sum of the budget and subtracting the existing commitments for the same time period for the same account or expense code to determine the budget

Budget Checking By	Option Status
ACCOUNT	OFF
EXPENSE CODE	OFF

Description: When the ACCOUNT rule key is set to ON and the EXPENSE CODE rule key is set to OFF the system verifies that approval of the record being processed will not cause the account(s)

Use this rule to determine whether or not the system should check against budgets when processing cost related records. You can also determine whether budget checking will be based on Accounts, on Expense Codes, or on both.

The system checks any budget by taking the year-to-date sum of the budget and subtracting the existing commitments for the same time period for the same account or expense code to determine the budget balance. If the record being processed will cause the account or expense code to go over budget the system will proceed with the action indicated in the Budget Checking by Document business rule.

The Account/Expense Code combination can be represented in the following manner:

Budget Checking By Option Status
ACCOUNT - OFF
EXPENSE CODE - OFF

The system does not check budgets when processing cost related records.

ACCOUNT - ON
EXPENSE CODE - OFF

The system verifies that approval of the record being processed will not cause the account(s) indicated on the record to go over budget. With this setting, individual expense codes can go over budget, as long as they do not cause the overall account to go over budget (i.e., one expense code can "borrow" budget dollars from another expense code).

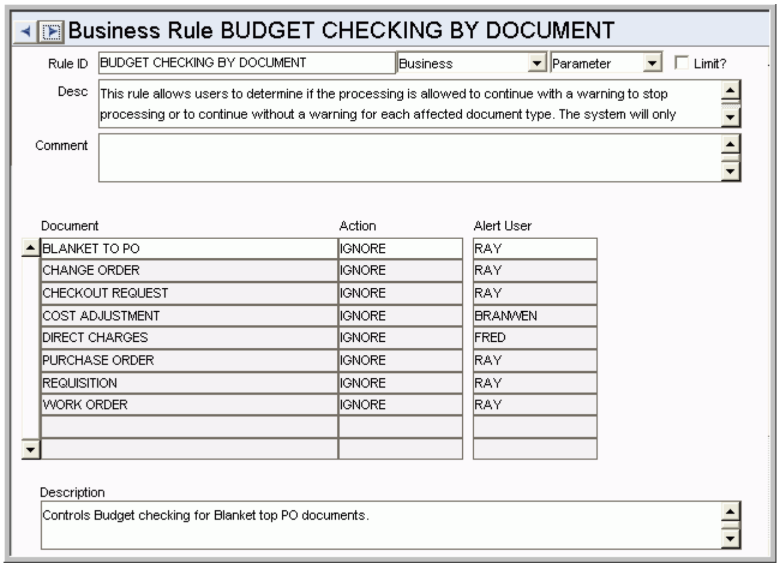
ACCOUNT - OFF
EXPENSE CODE - ON

The system verifies that approval of the record being processed will not cause the expense code (s) indicated on the record to go over budget. With this setting the overall account will not be allowed to go over budget because all of the expense codes that make up the account will be kept at or under budget.

ACCOUNT - ON
EXPENSE CODE - ON

The system checks both the overall budget amount for the account and the overall budget amount for the expense code to make sure that neither goes over budget. You might want to use this setting if you plan to allow budget overrides in normal processing so that if one expense code is allowed to go over budget and the approval of another expense code would cause the entire account to go over budget (even if the expense code itself would remain under budget), the system would catch the budget overrun on the account.

Budget Checking by Document Rule



Business Rule BUDGET CHECKING BY DOCUMENT

Rule ID: BUDGET CHECKING BY DOCUMENT | Business | Parameter | ☐ Limit?

Desc: This rule allows users to determine if the processing is allowed to continue with a warning to stop processing or to continue without a warning for each affected document type. The system will only

Comment:

Document	Action	Alert User
BLANKET TO PO	IGNORE	RAY
CHANGE ORDER	IGNORE	RAY
CHECKOUT REQUEST	IGNORE	RAY
COST ADJUSTMENT	IGNORE	BRANWEN
DIRECT CHARGES	IGNORE	FRED
PURCHASE ORDER	IGNORE	RAY
REQUISITION	IGNORE	RAY
WORK ORDER	IGNORE	RAY

Description: Controls Budget checking for Blanket top PO documents.

Use this rule to identify unique processing for the budget checks performed during approvals for certain documents. For each document, clients can establish whether the user will be warned that the budget will be exceeded, with the option to continue, or whether they will be stopped from approving the document if the budget will be exceeded or whether the system is to ignore giving the user budget information during approvals (still performs the budget check and alerts the appropriate users when exceeded). For each document, a user can be identified to receive an alert that a document has been approved or charges posted by batch that result in budget overruns.

Document

Indicates the type of document that will be checked for budget constraints.

Action

IGNORE - The system will not take any action if the budget amount will be exceeded when the record is approved.

STOP - The system will stop processing on the document indicated if the budget amount is exceeded.

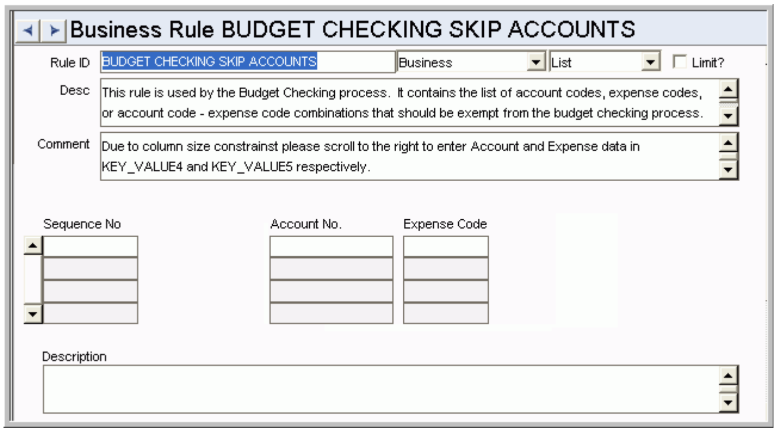
WARN - The system will display a warning message to the approver if the budget amount will be exceeded when the record is approved.

Alert User

Enter the username of the person that should receive an alert when the document type indicated exceeds the budget. If you leave this field blank, the system will still display a warning message on the screen during processing of the record (if the Action field is set to WARN), but will not send a system alert to anyone.

You can enter additional users in the Notification view of the Accounts module.

Budget Checking Skip Accounts Rule


Business Rule BUDGET CHECKING SKIP ACCOUNTS

Rule ID: BUDGET CHECKING SKIP ACCOUNTS | Business | List | ☐ Limit?

Desc: This rule is used by the Budget Checking process. It contains the list of account codes, expense codes, or account code - expense code combinations that should be exempt from the budget checking process.

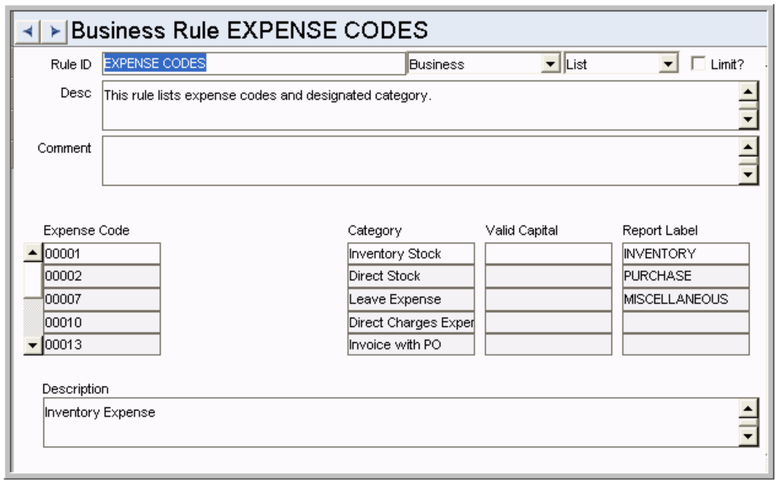
Comment: Due to column size constrainst please scroll to the right to enter Account and Expense data in KEY_VALUE4 and KEY_VALUE5 respectively.

Sequence No	Account No.	Expense Code

Description:

Use this rule to list the account codes, expense codes, or account code - expense code combinations that should be exempt from the budget checking process. Placing an asterisk (*) in either the account code or expense code field in the Rule Keys section of the rule denotes a wild card. For example, if you enter account number 1234-5678 and expense code, all budget checking related to account numbers 1234-5678, regardless of the expense code on the transaction, will be skipped.

Expense Codes Rule


Business Rule EXPENSE CODES

Rule ID: EXPENSE CODES | Business | List | ☐ Limit?

Desc: This rule lists expense codes and designated category.

Comment:

Expense Code	Category	Valid Capital	Report Label
00001	Inventory Stock		INVENTORY
00002	Direct Stock		PURCHASE
00007	Leave Expense		MISCELLANEOUS
00010	Direct Charges Exper		
00013	Invoice with PO		

Description: Inventory Expense

List expense codes and a category for each (such as regular labor, premium labor, stock purchases, direct purchases, etc.).

Expense Code and Category

Enter the valid code (used for accounting) in the EXPENSE CODE column. For each listed code, you can then enter the appropriate category into the CATEGORY column. These codes are used to summarize and categorize costs.

Note: Expense Codes are used with Account numbers to set up budgets for an entity.

CCB Expense

If your organization uses CCB Integration the CCB Expense column defines categories that are used to summarize costs when they are sent to Oracle Utilities Customer Care and Billing from Oracle Utilities Work and Asset Management on the completion of a service request. these codes should correspond to a Characteristic Type in Oracle Utilities Customer Care and Billing. The list of values for this field is defined in code table 1195 - CCB Expense.

Valid Capital
The Valid Capital column is designated for a custom configuration and is not used.

Code Tables

Code Table 251 to Code Table 260: ACCOUNT SEGMENT 1 to 10

These code tables control the lists of values for the segments in the Account module.

Code Table 1195 - CCB Expense

If your organization uses CCB Integration, use this table to define codes to use with the Expense Codes business rule.

Code Table 1196 - CCB Install Remove Flag

If your organization uses CCB Integration, use this table to define flag codes.

Copy Record

ACCTDATA - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

View External Actual Costs

Allows users to view the External Actual Amount, Budget Balance and Actual Quantity columns on Period Costs and Cost Summary views. These columns contain data from your organization's external financial system.

Reports

S_RPT204 - Purchase Order Expensing Account Detail Report

Lists Purchase Orders by Expense Code.

Views

Period Costs

Enter budget amounts for each account according to period in the Period Costs view.

Account Distribution Module

Account Distribution Templates are used in the Requisition, Purchase Order, Blanket Contract, and Blanket Contract to Purchase Order modules.

Fields

Sequence No.: Account Distribution ID

The record number is comprised of a unique ID (Ex. "ACC0000013"). Account Distribution record numbers are typically set to be system generated.

TABLE NAME - SA_ACCOUNT_DISTRIBUTION - The table for which the sequence number is generated.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Batch Processes

ACCOUNT DISTRIBUTION TEMPLATE - sdpb_default_accounts_status

You are able to set future start dates in the Account Templates module. This process runs today's start dates and sets those records to active on that day.

Copy Record

ACCTTMPL - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Regulatory Account Module

Use the Regulatory Account module to define the FERC, PUC and FCC accounts required by your organization, and to associate these accounts with the appropriate account treatments and usage codes. As compatible units are planned against Work Order Task records, costs are applied to these accounts.

Fields

WIP Account

The list of values for this field is derived from other active Regulatory Account records that were created with Work In Progress designated in the Accounting Treatment field. Use these accounts to track costs for work while it is in progress.

Usage Code Field

If you try to select a Usage Code on a record and the list of values does not show any entries, there could be one of two reasons why there are no codes.

1. The Regulatory Account Usage Codes Business Rule must list at least one Usage Code associated to the Account Type selected.

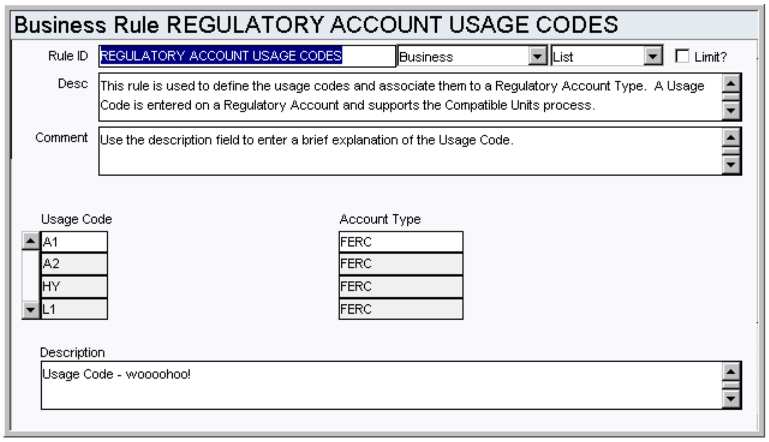
2. There may already be another active Regulatory Account record set with the Account Type and Accounting Treatment combination selected on the current record. The system only allows ONE record with a particular Account Type/Accounting Treatment combination.

Overhead Class

List of values is controlled by the Regulatory Acct Overhead Class Business Rule. This field is only updatable when the account treatment is Overhead.

Business Rules

Regulatory Account Usage Codes



Business Rule REGULATORY ACCOUNT USAGE CODES

Rule ID: REGULATORY ACCOUNT USAGE CODES | Business | List | ☐ Limit?

Desc: This rule is used to define the usage codes and associate them to a Regulatory Account Type. A Usage Code is entered on a Regulatory Account and supports the Compatible Units process.

Comment: Use the description field to enter a brief explanation of the Usage Code.

Usage Code	Account Type
A1	FERC
A2	FERC
HY	FERC
L1	FERC

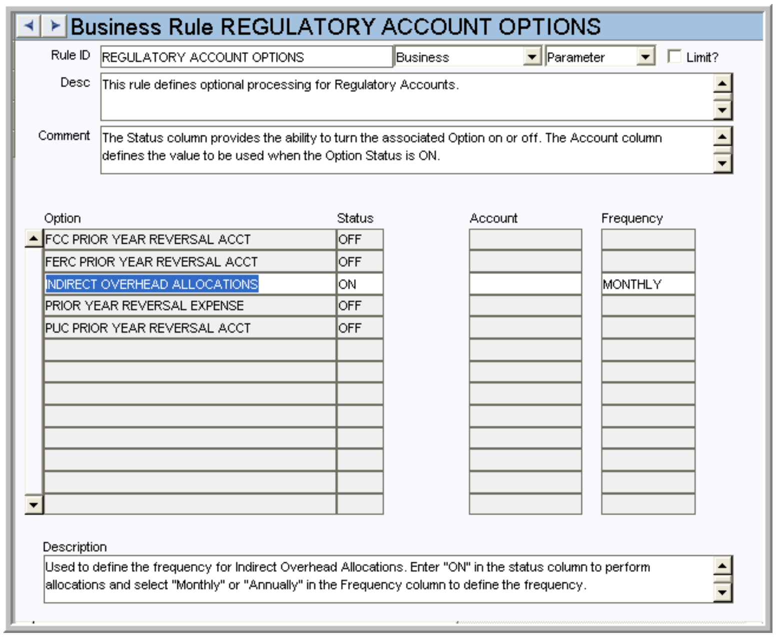
Description: Usage Code - woooohoo!

Define the usage codes used on Regulatory Account and Compatible Units records. Also associate these codes to a regulatory account type such as FERC, FCC, or PUC.

Usage Code and Account Type

Define codes appropriate to your business practices and associate them to an account type.

Regulatory Account Options



Rule ID: REGULATORY ACCOUNT OPTIONS | Business | Parameter | ☐ Limit?

Desc: This rule defines optional processing for Regulatory Accounts.

Comment: The Status column provides the ability to turn the associated Option on or off. The Account column defines the value to be used when the Option Status is ON.

Option	Status	Account	Frequency
FCC PRIOR YEAR REVERSAL ACCT	OFF		
FERC PRIOR YEAR REVERSAL ACCT	OFF		
INDIRECT OVERHEAD ALLOCATIONS	ON		MONTHLY
PRIOR YEAR REVERSAL EXPENSE	OFF		
PUC PRIOR YEAR REVERSAL ACCT	OFF		

Description: Used to define the frequency for Indirect Overhead Allocations. Enter "ON" in the status column to perform allocations and select "Monthly" or "Annually" in the Frequency column to define the frequency.

Determine how regulatory accounts are processed within the system.

FCC PRIOR YEAR REVERSAL ACCT - Used to define the regulatory account to be used for reversal of costs from prior years for FCC Account Types. Enter “ON” in the Status column to define a separate regulatory account for the reversal charges. Enter “OFF” to have the reversal charges applied to the same regulatory account as the original charges.

FERC PRIOR YEAR REVERSAL ACCT - Used to define the regulatory account to be used for reversal of costs from prior years for FERC Account Types. Enter “ON” in the Status column to define a separate regulatory account for the reversal charges. Enter “OFF” to have the reversal charges applied to the same regulatory account as the original charges.

INDIRECT OVERHEAD ALLOCATIONS - Used to define the frequency for Indirect Overhead Allocations. Enter “ON” in the status column to perform allocations and select “Monthly” or “Annually” in the Frequency column to define the frequency.

PRIOR YEAR REVERSAL EXPENSE - Used to define the expense code to be used for reversal of costs from prior years for all Account Types. Enter “ON” in the Status column to define a separate expense code for the reversal charges. Enter “OFF” to have the reversal charges applied to the same expense code as the original charges.

PUC PRIOR YEAR REVERSAL ACCT - Used to define the regulatory account to be used for reversal of costs from prior years for PUC Account Types. Enter “ON” in the Status column to define a separate regulatory account for the reversal charges. Enter “OFF” to have the reversal charges applied to the same Regulatory Account as the original charges.

Regulatory Account Overhead Class

Define overhead classes for estimating overhead allocation on Work Order Tasks.

Sequence Number

Use the Sequence number to specify the order in which the overhead class is distributed.

OH Class Type

Define the Overhead Class Type name in this free form field.

Estimated OH%

Use the Estimated OH% field to enter an estimate overhead percentage based on the Applied Type chosen.

Applied Type

Select a type from the list of values defined by the Expense Codes Business rule.

Description

Enter a brief description that will help users identify the overhead class they want to use. Along with the OH Class Type, the description displays on List of Values in the Regulatory Accounting module showing available Overhead Classes.

Batch Processes

Regulatory Account Cost - sdbp_regulatory_account_cost;

Posts costs associated to regulatory accounts.

Year End Overhead Distribution - sdbp_year_end_oh_cost_dist;

Allocates costs from the Overhead Regulatory Accounts to the related non-overhead accounts (Capital, Maintenance, Operations, Work In Progress) based on Overhead Class.

Process Fixed Assets - sdbp_work_order.fixed_asset;

Processes actual amounts and allocation amounts for a work order task and applies them to the Regulatory Accounts associated to the compatible units on the task. Also determines the value of fixed assets associated to the capital regulatory accounts on the work order tasks. This procedure also includes the package that creates change requests for the creation or retirement of group assets on a work order task.

Copy Record

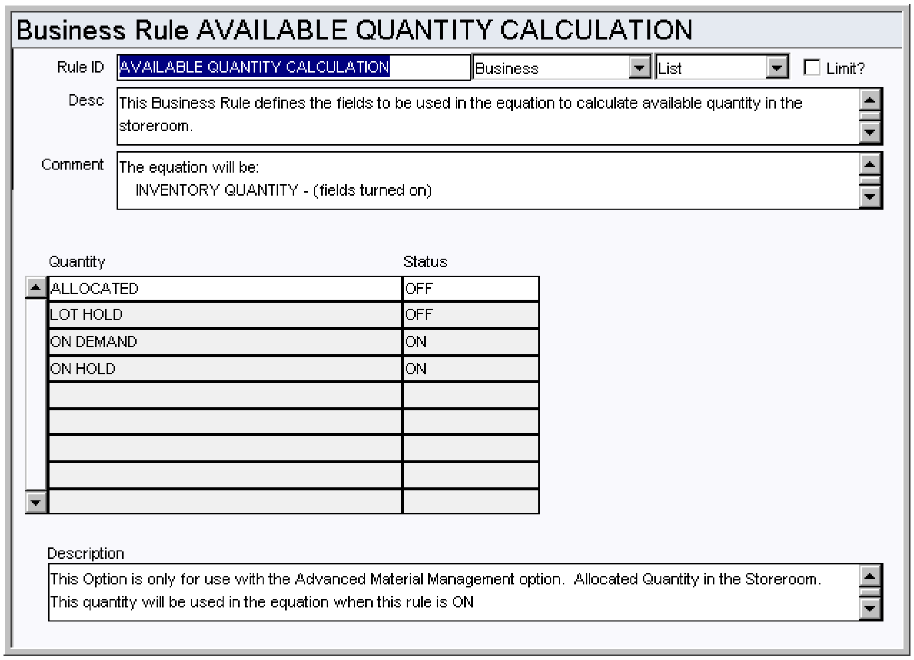
REGACCT - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Storeroom Module

Business Rules

Available Quantity Calculation Rule



Business Rule AVAILABLE QUANTITY CALCULATION

Rule ID: AVAILABLE QUANTITY CALCULATION | Business | List | ☐ Limit?

Desc: This Business Rule defines the fields to be used in the equation to calculate available quantity in the storeroom.

Comment: The equation will be:
INVENTORY QUANTITY - (fields turned on)

Quantity	Status
ALLOCATED	OFF
LOT HOLD	OFF
ON DEMAND	ON
ON HOLD	ON

Description: This Option is only for use with the Advanced Material Management option. Allocated Quantity in the Storeroom. This quantity will be used in the equation when this rule is ON

Determine the quantities to use in the calculation of available inventory quantity for stock items.

Quantity and Status

Set the Status to ON or OFF to enable or disable the rule key.

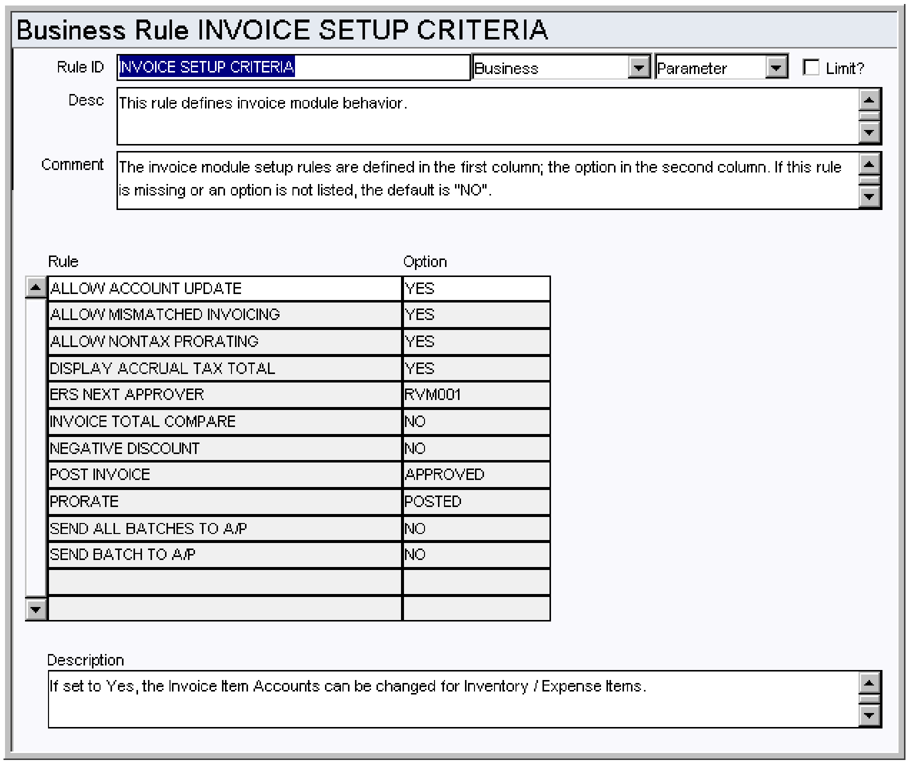
ALLOCATED - This is an Advanced Material Management Option only. If this option is turned on, the allocated quantities will be subtracted from the inventory quantity to determine available quantity.

LOT HOLD - This is an Advanced Material Management Option only. If this option is turned on, the quantities on LOT HOLD will be subtracted from the inventory quantity to determine available quantity.

ON DEMAND - If this option is turned on, the quantities ON DEMAND will be subtracted from the inventory quantity to determine available quantity.

ON HOLD - If this option is turned on, the quantities ON HOLD will be subtracted from the inventory quantity to determine available quantity.

Invoice Setup Criteria Rule



Business Rule INVOICE SETUP CRITERIA

Rule ID: INVOICE SETUP CRITERIA | Business | Parameter | ☐ Limit?

Desc: This rule defines invoice module behavior.

Comment: The invoice module setup rules are defined in the first column; the option in the second column. If this rule is missing or an option is not listed, the default is "NO".

Rule	Option
ALLOW ACCOUNT UPDATE	YES
ALLOW MISMATCHED INVOICING	YES
ALLOW NONTAX PRORATING	YES
DISPLAY ACCRUAL TAX TOTAL	YES
ERS NEXT APPROVER	RVM001
INVOICE TOTAL COMPARE	NO
NEGATIVE DISCOUNT	NO
POST INVOICE	APPROVED
PRORATE	POSTED
SEND ALL BATCHES TO A/P	NO
SEND BATCH TO A/P	NO

Description: If set to Yes, the Invoice Item Accounts can be changed for Inventory / Expense Items.

Define how average unit price is calculated.

Rule and Option

ALLOW ACCOUNT UPDATE - If this rule key is set to YES users can override and change the Account for Inventory and Expense type stock codes on Invoice Line Items. User's responsibility profile must also contain the function, INVOICE ACCOUNT OVERRIDE.

ALLOW MISMATCHED INVOICING - If this option is set to YES it will allow an Invoice that does not match the Purchase Order to be recorded in the system. The system automatically puts such records into Pending Resolution status. After the mismatch has been resolved, batch processing changes the status to Approved.

ALLOW MULTIPLE POS - When this option is set to ON, you can record more than one purchase order per invoice. The system provides a Change PO button on the Matching to PO views and a Start Again option on the Quick Invoice Wizard where items from additional purchase order(s) can be recorded.

ALLOW NONTAX PRORATING - This option defines whether or not prorating to non-taxed line items is allowed or disallowed.

AVERAGE UNIT PRICE CALCULATION - Defines how the system calculates Average Unit Price (AUP) for a storeroom when the difference between the total amount of an invoiced item is greater than the total amount on the original purchase order item. If the rule is set to OFF, the entire difference is applied evenly among the Storeroom Item On Hand Quantity. If the rule is set to ON, the difference per item is applied.

For example: Assume a brand new storeroom item. PO Item ordered and received for 10 items at $1 each. Stock Checkout of 8 items, thus On Hand Quantity is 2. Then invoiced at $2 for all 10 items.

If the rule is set to OFF, the AUP will be $6.00 ($1 + Difference divided by On Hand

Quantity).

If the rule is set to ON, the AUP will be $2.00. ($1 + difference per item).

COPY PO ATTACHMENTS - When this option is set to YES, all existing attachments associated to the Purchase Order header are copied to the new Invoice record. Also any attachments associated to the Purchase Order line item are copied to the new invoice during the Matching to PO process. The default setting is NO.

DISPLAY ACCRUAL TAX TOTAL - Set this option to YES to display the accrued tax total on the invoice header.

ERS NEXT APPROVER - Identifies the next approver for Auto Invoices that have received more items than were ordered.

INVOICE TOTAL COMPARE - Set this option to 'YES' to display a warning when the manual invoice total field and the invoice total amount fields do not match. The warning message be displays when the user attempts to change status to Pending Approval.

NEGATIVE DISCOUNT - Set this option to YES to allow a negative number to be entered in the Discount Rate field on the invoice header. Do this if you want to markup (increase) the item total by the percentage entered.

OVERRIDE DISCOUNT AMOUNT - If this option is set to YES, the Invoice Discount Amount can be manually updated with a new value when the Invoice has an Item Total Amount. When the Invoice Discount Amount is manually updated the Invoice Discount Rate is recalculated appropriately. When the option is set to NO, the Invoice Discount Amount is calculated based on the Discount Rate and cannot be updated manually.

POST INVOICE - This option determines when invoices are posted throughout the system.

If Post Invoice is set to Approved (Default), the system posts invoices when invoices are in Approved status.

If Post Invoice is set to Sent to A/P, the system posts invoices when the invoice status is set to Approved and the Sent to A/P indicator is set to 'Y'.

If Post Issue is set to Paid, the system posts invoices when the invoice status is set to Approved and the Paid Indicator is set to 'Y'.

PRORATE - This option determines when the prorating procedure is executed.

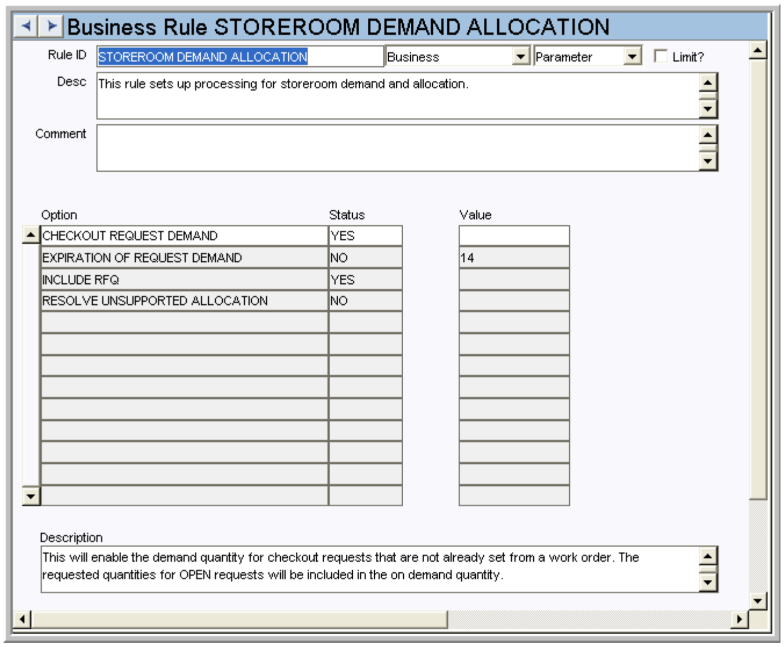
If this option is set to APPROVED, the prorate procedure will be executed when the Invoice status is set to Approved. The user will not be allowed to set the status of the Invoice record from APPROVED back to CREATED.

If this option is set to POSTED, the prorate procedure will be called during batch processing when the Invoice is set to Posted. Status changes from APPROVED back to CREATED are allowed with this setting.

SEND ALL BATCHES TO A/P - Set this option to YES to display the Send All Batches to A/P action in the Invoice Batch module.

SEND BATCH TO A/P - Set this option to YES to display the Send Batch to A/P action in the Invoice Batch module.

Storeroom Demand Allocation Rule



Business Rule STOREROOM DEMAND ALLOCATION

Rule ID: STOREROOM DEMAND ALLOCATION — Business — Parameter — ☐ Limit?

Desc: This rule sets up processing for storeroom demand and allocation.

Comment:

Option	Status	Value
CHECKOUT REQUEST DEMAND	YES	
EXPIRATION OF REQUEST DEMAND	NO	14
INCLUDE RFQ	YES	
RESOLVE UNSUPPORTED ALLOCATION	NO	

Description: This will enable the demand quantity for checkout requests that are not already set from a work order. The requested quantities for OPEN requests will be included in the on demand quantity.

Set up processing for storeroom demand and allocation.

Option, Status and Value

CHECKOUT REQUEST DEMAND - (YES/NO) If this rule key is set to YES, checkout requests in ACTIVE status will be counted in the demand quantity shown in the Storeroom Pricing view of the Storeroom module, and will be factored in whenever Storeroom demand is calculated. If the rule key is set to NO checkout requests will not be included in any demand quantity calculations. If the rule key is changed from NO to YES the system does not recalculate existing quantities, but will begin to include ACTIVE checkout requests in calculations made after the change.

INCLUDE RFQ - This rule key determines whether the quantity on Request for Quotes line items in CREATED, APPROVED or ISSUED status which originated from an Approved Requisition are to be included in the Pending Order quantity field on the Storeroom Pricing screen.

EXPIRATION OF REQUEST DEMAND - (AMMO ONLY) - Not used.

RESOLVE UNSUPPORTED ALLOCATION - (Advanced Materials Management Option ONLY) - Not used.

Code Tables

Code Table 69: Reorder Reviewer Code

Reviewer Code - Define codes to assign reviewers for specific stock items. This field is searchable on the Storeroom Search Options screen enabling you to categorize Reorder Review items by reviewer.

DBA Code

Code Table 187: Inventory Adjustment Reason Codes (Inventory Quantity Adjustments Action)

Adjustment Reason field - Define reasons for adjusting inventory quantities. Typical values may be Bad Inventory Count, Error Correction, Shrinkage, etc.

Copy Record

STORERM -COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Reorder Wizard

Grants the ability to create and approve reorder records.

Storeroom ABC

Grants access to the ABC Processing Options view in the Storeroom module.

Storeroom Adjustment

Grants access to the Adjust Inventory Quantity action in the Storeroom module.

Storeroom Reorder

Grants the ability to modify the Stores Reorder fields on the Storeroom Pricing view of the Storeroom module.

Batch Processes

Cost Invoice - sdbp_cost_invoice.cost_invoice;

Processes costs for purchase Invoices, selecting approved Invoices and posting costs throughout the system as required. Once an Invoice is successfully processed, it is marked as posted.

Cost Stock - sdbp_cost_stock.cost_stock;

Processes costs for stock transactions that have not yet been posted. Information is selected from the table SA_INVENTORY_LOG and posted throughout the system as required. Once a stock cost transaction is successfully processed, it is marked as posted.

End of Period Processing - sdbp_end_of_period_processing;

Processes storeroom data at the end of each accounting period, populating the Storeroom Usage table and resetting the Storeroom Month-to-Date (MTD) Usage quantity to zero.

Reset Demand Quantity - sdbp_storeroom_demand;

Recalculates the On-Demand Quantity for parts within the storeroom. This procedure reviews all active work order tasks, summing the quantities required across tasks for stock items. Once recalculated, the On-Demand Quantity for each storeroom item is updated accordingly. Note that this batch procedure is not a required procedure since standard processing maintains the storeroom On-Demand Quantity. This serves as an extra level of assurance that the On-Demand Quantities are correct as of each nightly batch run. Note that running this process could potentially be time consuming if there is a large amount of data for the system to process.

RESET ON ORDER QUANTITY - sdbp_storeroom_on_order;
Resets the quantity for storeroom parts that are on order. This procedure is triggered when a PO is canceled.

Stock Reorder - sdbp_stock_reoder.stock_reorder;
Reviews all storeroom items, selecting those that are set up for automatic reorder and processes those items that have reached their reorder point. This process uses settings in the Batch Stock Reorder Business Rule to calculate the quantity to reorder. The basic calculation is:

reorder_quantity = maximum_quantity - (inventory_quantity + in receipt quantity + on_order_quantity + reorder_quantity + repair_quantity)

You can set a custom batch process to run SDBP_STOCK_REORDER on a specific storeroom by entering that storeroom in the job parameters."

Storeroom Demand - sdbp_storeroom_demand;
Recalculates the On-Demand Quantity for parts within the Storeroom. This procedure reviews all active Work Order Tasks, summing the quantities required across Tasks for stock items. Once recalculated, the On-Demand Quantity for each Storeroom item is updated accordingly. Note that this batch procedure is not a required procedure since standard processing maintains the Storeroom On-Demand Quantity. This serves as an extra level of assurance that the On-Demand Quantities are correct as of each nightly batch run. Note that running this process could potentially be time consuming if there is a large amount of data for the system to process.

Storeroom Repair Costs - sdbp_storeroom_repair_costs;
Sums costs based on the material and account log for material that has been dispositioned from closed work orders.

Charts

S_CHT127 - Inventory Turns
The number of turns per inventory item. The number of turns per inventory is calculated as follows: Usage Quantity / (Maximum Quantity - Reorder Point). The data can be filtered further by Plant, Stock Type and by time period. Other filtering options, including Storeroom and Stock Code, are available in the Chart Field List.

S_CHT128 - Inventory Valuation
The Total Value of each inventory item. The data can be filtered further by Plant, Storeroom, Stock Type and Stock Class.

Reports

S_RPT050 - Catalog Non-Usage Report
Lists Stock items (and the last 10 transactions) that have not been used for selected period of time.

S_RPT016 - Catalog (without Quantities) Report
Shows an inventory of Stock items by storeroom without displaying Item quantities.

S_RPT026 - Inventory Picklist Report
Lists Stock items to be issued from the storeroom and can be used to provide storeroom personnel a means to prepare Stock for pickup or delivery.

This list can be built by either planning Stock items on a work order before the work order is activated or by creating a checkout request.

Note: S_RPT026B is the bar code font version of this report.

S_RPT034 - New Stock Items Report

Lists Stock items that are new to the catalog.

S_RPT032 - New Storeroom Items Report

This report is a listing of Stock items new to storerooms.

S_RPT035 - Overstock Report

Lists Stock items where the quantity on-hand is greater than the maximum quantity. This information is retrieved from the Storeroom module of the Resource subsystem.

S_RPT202 - Purchase Order Inventory Item Cost Report

Displays Cost Summaries of all Purchase Orders made for "stocked" items to compare current purchase price with average unit price and calculate the price variance.

S_RPT115 - Stock Transfer Report

Lists Stock items to be issued from one storeroom and received in another.

Note: S_RPT115B is the bar code font version of this report.

S_RPT033 - Storeroom Activity Report

Lists storeroom transaction information over a selected period of time.

S_RPT017 - Storeroom Report with Quantities

Lists stock codes from the Storeroom module of the Resource subsystem. Quantity and price information is included.

S_RPT019 - Storeroom Value by Class

Lists total storeroom values by Class from the Storeroom module of the Resource subsystem.

S_RPT106 - Storeroom Value By Stock Code

Displays average values for storeroom items along with related information.

S_RPT083 - Tax Report for Inventoried Stocked Items

Provides a summary of taxable inventoried Stock items that have been used to maintain assets. These transactions represent an overpayment / underpayment of taxes.

S_RPT082 - Tax Report for Non-Stocked Items

Provides a summary of taxable non-stock items that have been used to maintain assets. These transactions represent an overpayment / underpayment of taxes.

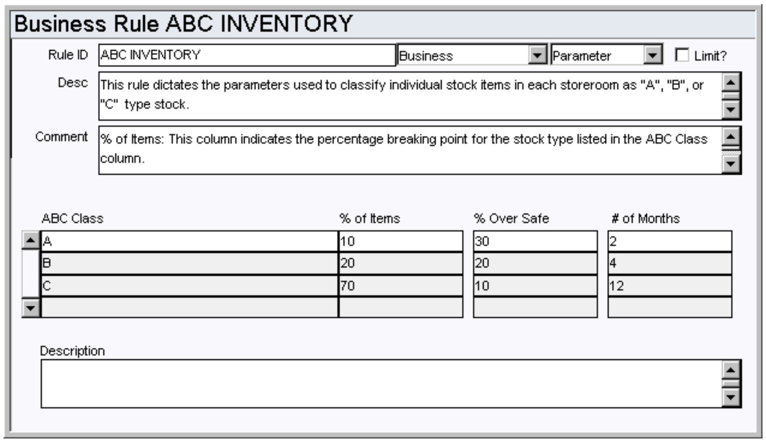
S_RPT036 - Understock Report

Lists Stock items where the quantity on-hand is less than the maximum quantity. This information is retrieved from the Storeroom module of the Resource subsystem.

Storeroom Setup Module

Business Rules

ABC Inventory Rule



Business Rule ABC INVENTORY

Rule ID: ABC INVENTORY | Business | Parameter | ☐ Limit?

Desc: This rule dictates the parameters used to classify individual stock items in each storeroom as "A", "B", or "C" type stock.

Comment: % of Items: This column indicates the percentage breaking point for the stock type listed in the ABC Class column.

ABC Class	% of Items	% Over Safe	# of Months
A	10	30	2
B	20	20	4
C	70	10	12

Description

Establish the parameters used to classify individual stock items in each storeroom as “A”, “B” or “C” class stock. These stock classes are based on the relative value of the prior twelve month's usage and item value and can be used to recalculate reorder parameters. Typically, A class items should reordered more frequently than B or C class items.

Users working with ABC Inventory need to have the Storeroom ABC function in their responsibilities.

ABC Class

A class stock makes up the top value usage over the past 12 months. Items with this type class have a high dollar usage value.

B class stock makes up the next value usage over the last 12 months. Items with this type class have a dollar usage value in the middle; it is neither high nor low.

C class stock makes up the remaining value usage over the last 12 months. Items with this type class have a low dollar usage value.

% of Items

Indicates the percentage breaking point for the stock class listed in the “ABC Class” column (e.g. A class is 20%, B class is 30% and C class is the remaining 50%.)

% Over Safe

Dictates the percentage over the safety level (minimum quantity) used to set the reorder point quantity.

# of Months

The desired reorder frequency (in number of months) used to determine the maximum quantity.

Code Tables

Code Table 4: Storeroom Types (Length = 10)

Type field - Categorize the type of Storeroom record at a high level. Typical Storeroom Types can include QC (Quality Control), RECEIVING (Receiving Warehouse), REGULAR (Regular Storeroom), VIRTUAL (Virtual Storeroom), etc. Users can populate Code Table 4 with a logical grouping of storerooms that they have created to categorize storerooms.

Copy Record

STORESET - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Master Catalog Module

Fields

Sequence No.: Stock Code

The record number is comprised of a unique ID (Ex. "AUT_ALTNATE_001"). Stock Code record numbers are typically set to be created manually.

TABLE NAME - SA_CATALOG - The sequence number is generated for this database table.

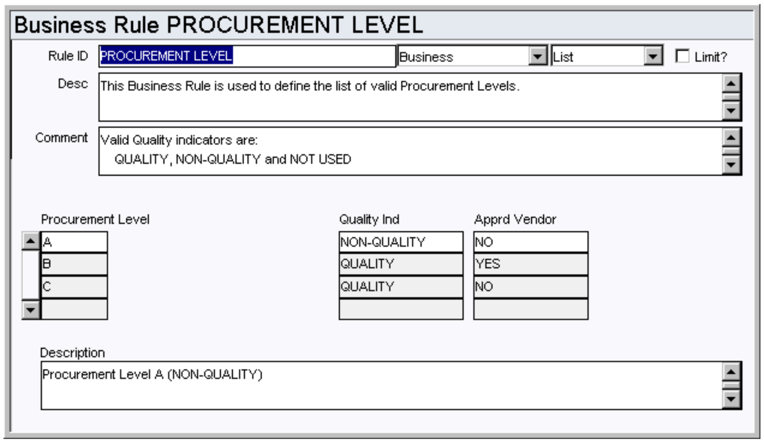
Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Business Rules

Procurement Level Rule (Associated Stock Codes View)



Business Rule PROCUREMENT LEVEL

Rule ID: PROCUREMENT LEVEL | Business | List | ☐ Limit?

Desc: This Business Rule is used to define the list of valid Procurement Levels.

Comment: Valid Quality indicators are:
QUALITY, NON-QUALITY and NOT USED

Procurement Level	Quality Ind	Apprd Vendor
A	NON-QUALITY	NO
B	QUALITY	YES
C	QUALITY	NO

Description: Procurement Level A (NON-QUALITY)

Define a list of valid Procurement Levels.

Procurement Level

List the user determined procurement levels.

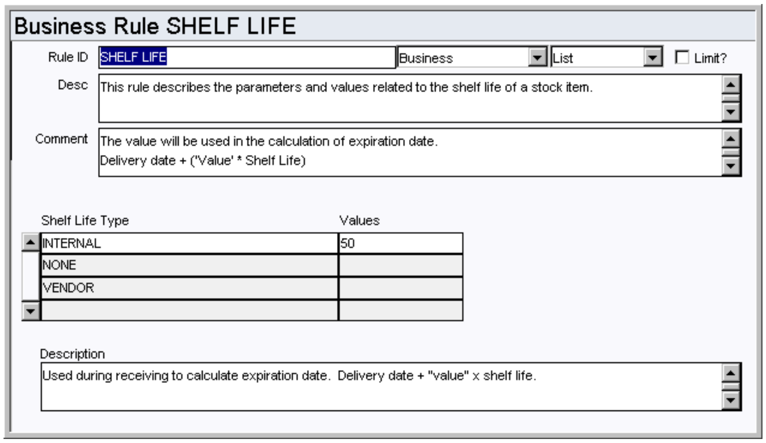
Quality Indicator

For each Procurement Level code, assign a Quality Indicator. The valid values are QUALITY, NON-QUALITY and NOT USED.

Approved Vendor

For each Procurement Level code, indicate whether or not an approved vendor must be used when purchasing items of this Procurement Level. Valid selections are Yes or No.

Shelf Life Rule (Associated Stock Codes View)



Business Rule SHELF LIFE

Rule ID: SHELF LIFE | Business | List | ☐ Limit?

Desc: This rule describes the parameters and values related to the shelf life of a stock item.

Comment: The value will be used in the calculation of expiration date.
Delivery date + ('Value' * Shelf Life)

Shelf Life Type	Values
INTERNAL	50
NONE	
VENDOR	

Description: Used during receiving to calculate expiration date. Delivery date + "value" x shelf life.

Determine the types of calculations that can be utilized to determine the expiration of Stock Item Lots.

Shelf Life Types

INTERNAL - The value will be used in the calculation of the expiration date. Delivery date + ('Value' * Shelf Life).

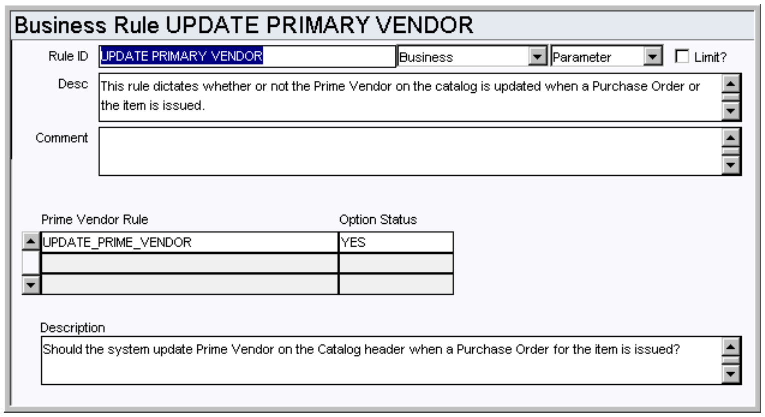
NONE - The value will be used in the calculation of the expiration date. Delivery date + Shelf Life.

VENDOR - The vendor supplies the expiration date.

Values

The value represents a percentage adjustment to be applied in the calculation of the expiration date.

Update Primary Vendor Rule (Associated Stock Codes View)



Business Rule UPDATE PRIMARY VENDOR

Rule ID: UPDATE PRIMARY VENDOR | Business | Parameter | ☐ Limit?

Desc: This rule dictates whether or not the Prime Vendor on the catalog is updated when a Purchase Order or the item is issued.

Comment:

Prime Vendor Rule	Option Status
UPDATE_PRIME_VENDOR	YES

Description: Should the system update Prime Vendor on the Catalog header when a Purchase Order for the item is issued?

Set the system to update or not update the Prime Vendor on Catalog Stock Item records each time a Purchase Order that references the Stock Item is Approved.

Prime Vendor Rule and Option Status

UPDATE_PRIME_VENDOR - Options are YES or NO. If this rule key is set to YES, the Prime Vendor on Stock Item records is updated to the Vendor listed on each new approved Purchase Order. If the rule key is set to NO then the Prime Vendor on the Catalog record remains the same regardless of what is listed on Purchase Orders.

Code Tables

Code Table 212: Item Class Codes (Length = 10)

Class field - Classify Stock Items into groups. Typically, Class Codes are set up for high turnover items (to help in generating Physical Inventory lists). Classifying the Stock Items in this manner facilitates searches by allowing queries to be conducted at a high level.

Code Table 23: Unit of Measure (Length = 4)

Unit of Purchase (UOP) and Unit of Issue (UOI) fields - Define units codes. These fields are used by the system to maintain quantities as parts are issued and new parts are received. You may, for instance, issue in units of each ('EA') but order in units of boxes ('BOX') where one box would contain 10 individual items. Code Table 23 enables you to define the different Units of Purchase and Units of Issue.

Code Table 18: Purchasing Commodity Codes (Length = 20)

Commodity Code fields - Classify stock items by purchasing group. For example, a purchasing group might be in charge for ordering Lumber, Chemicals, Vehicles, etc. Classifying the Stock Items in this manner facilitates searches by allowing queries to be conducted at a high level.

Code Table 159: Federal Tax Codes (Length = 1)

Federal field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 160: State Tax Codes (Length = 1)

State field - The code can only be one character and the Description should contain the percentage rate in the first six characters of the field.

Code Table 161: Duty Codes (Length = 1)

Duty field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 122: Commodity Category Codes (Length = 5)

Category field - Commodity information can be especially helpful when trying to locate a specific stock code. Commodity Codes categorize and sub-categorize stock items, allowing you to create and maintain a descriptive structure used to quickly identify the type of part you are looking for, and from a much shorter list of stock items, locate the right one.

A sample Category Code might be Electrical or Instrumentation.

Link

Each Category Code points to its own Commodity Name Code Table. This Link field is where the Commodity Name Code Table number would be inserted. For example, if 'M' (for Mechanical) is chosen as the Commodity Code, the 'linked' table for Commodity Names would only contain values that pertain to the 'M' category.

Code Tables 122, 123, 124, 125, 128, and 129 work together to define one Commodity Code.

Code Table 123: Commodity Composition (Length = 10)

Composition field - Physical matter types are populated in this code table. Some examples might be Aluminum, Iron, Rubber, etc.

Code Table 6: Hazardous Types (Length = 10)

Hazardous field (unlabeled field under the Hazardous check box) - Define types of hazards. Some examples might be Flammable, Toxic, Poisonous, etc.

Code Table 360: Quality Classes

Quality Class provides another way to classify Catalog items in respect to Material

Control. The Quality Class will display on purchasing, receiving and inventory-related records. Some examples might be (High, Low, Medium)

Code Table 202: Storage Code (Length = 5)

Storage Code field - Classify catalog items by how they should be stored. Some examples might be (Temp controlled under 40 degrees, clean room storage, dry storage, etc.)

Code Table 203: Special Requirements (Length = 5)

Special Requirement field - Define catch-all codes to include any other miscellaneous special issues related to the catalog item. Some examples might be (Handle with Care/ Fragile, Ship by Ground Transportation Only).

Code Table 209: Relationship Types (Associated Stock Codes View) (Length = 20)

Relationship Type column - Define how similar stock codes relate to one another. Some examples of data for this code table are: Complement, Other relationship type, or Substitute.

Copy Record

CATALOG - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Batch Processes

Create BOM Details - sdbp_create_bom_details.create_bom_details;

Provides an automated means of updating existing bill of materials with new stock codes based on other operations occurring in the system. Stock Code is added to the BOM ID related to Asset ID/Component ID information selected from SA_INVENTORY_LOG and SA_RECEIVING_LOG tables. Once a log record is successfully processed, it is marked as complete.

Charts

S_CHT127 - Inventory Turns

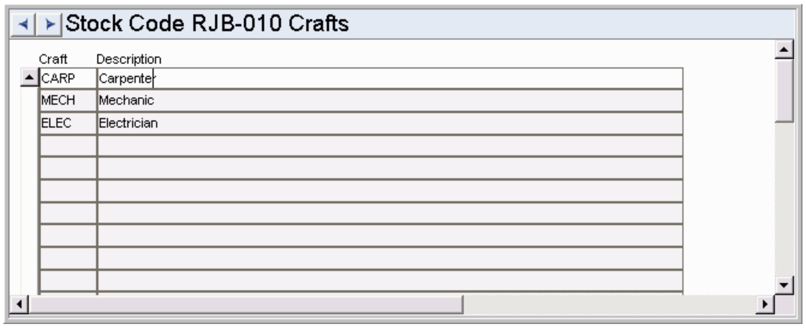
The number of turns per inventory item. The number of turns per inventory is calculated as follows: Usage Quantity / (Maximum Quantity - Reorder Point). The data can be filtered further by Plant, Stock Type and by time period. Other filtering options, including Storeroom and Stock Code, are available in the Chart Field List.

S_CHT128 - Inventory Valuation

The Total Value of each inventory item. The data can be filtered further by Plant, Storeroom, Stock Type and Stock Class.

Views

Crafts



Stock Code RJB-010 Crafts

Craft	Description
CARP	Carpenter
MECH	Mechanic
ELEC	Electrician

Associated crafts are for informational purposes only and are not used elsewhere in the system.

For each item in your catalog, you can create a list of crafts that typically use or are responsible for installation and maintenance of the item. You can only list a craft once per item.

Asset Module

Fields

Sequence No.: Asset ID

The record number is comprised of a unique ID (Ex. “ILB ASSET 1") and Asset Record Type (Ex. “E”). The system uses the combination of the Asset record type, and the Asset ID. Many clients use system generated sequence numbers for the Asset ID to ease the burden of creating, documenting, and maintaining a “smart” numbering system. However, some clients do choose to allow users to create this number manually. The number must be unique in either case.

TABLE NAME - ASSET - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Asset Class

Assign an asset class to the asset based on the classes defined in the Asset Class module.

Approval Route Field (Permit Template Requirements View)

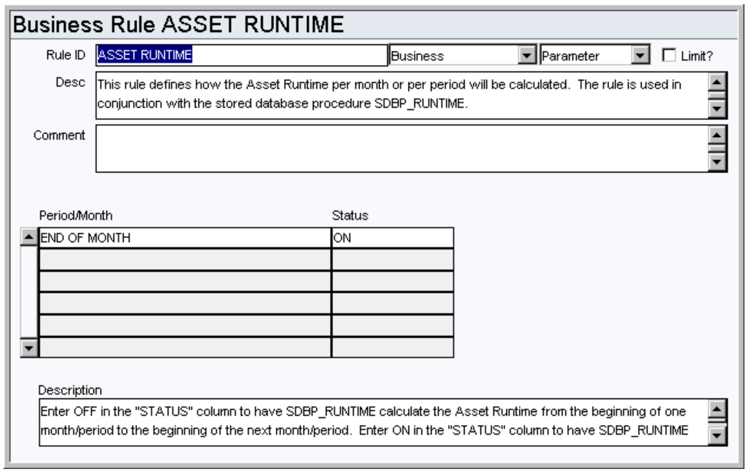
Designate the Approval Route needed to verify the Permit Template assigned to the Asset. Approval Routes are created in the Routing List module under Approvals and Routes in the Administration subsystem.

Maintenance Manager

The value entered in the Maintenance Manager field on the Asset header determines which Maintenance Manager will bear the costs associated with the asset when work is done. The field is controlled by a list of values the system builds using the Maintenance Manager module in the Resource subsystem.

Business Rules

Asset Runtime Rule



Business Rule ASSET RUNTIME

Rule ID: ASSET RUNTIME | Business | Parameter | ☐ Limit?

Desc: This rule defines how the Asset Runtime per month or per period will be calculated. The rule is used in conjunction with the stored database procedure SDBP_RUNTIME.

Comment:

Period/Month	Status
END OF MONTH	ON

Description: Enter OFF in the "STATUS" column to have SDBP_RUNTIME calculate the Asset Runtime from the beginning of one month/period to the beginning of the next month/period. Enter ON in the "STATUS" column to have SDBP_RUNTIME

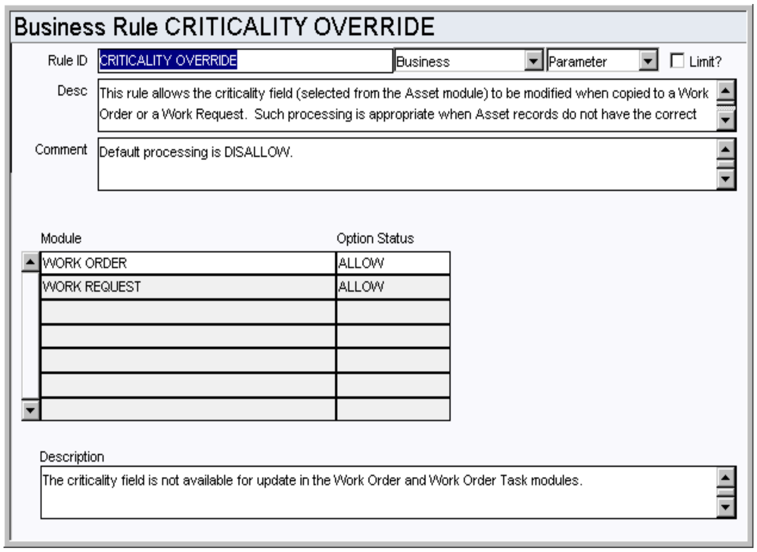
Define how the Asset Runtime per month or per period will be calculated. The rule is used in conjunction with the stored database procedure SDBP_RUNTIME.

Period/Month and Status

ALLOW LOWER RUNTIME - This key only affects assets with depreciation method of Units of Production. A Status of YES allows entry of a reading lower than or equal to the last reading. A Status of NO only allows entry of a reading higher than the last reading.

END OF MONTH - Entering ON or OFF in the status determines the period of time the SDBP_RUNTIME calculates the Asset Runtime from. ON calculates from the end of one month or period to the end of the next month or period. OFF calculates from the beginning of one month or period to the beginning of the next month or period.

Criticality Override Rule



Business Rule CRITICALITY OVERRIDE

Rule ID: CRITICALITY OVERRIDE | Business | Parameter | ☐ Limit?

Desc: This rule allows the criticality field (selected from the Asset module) to be modified when copied to a Work Order or a Work Request. Such processing is appropriate when Asset records do not have the correct

Comment: Default processing is DISALLOW.

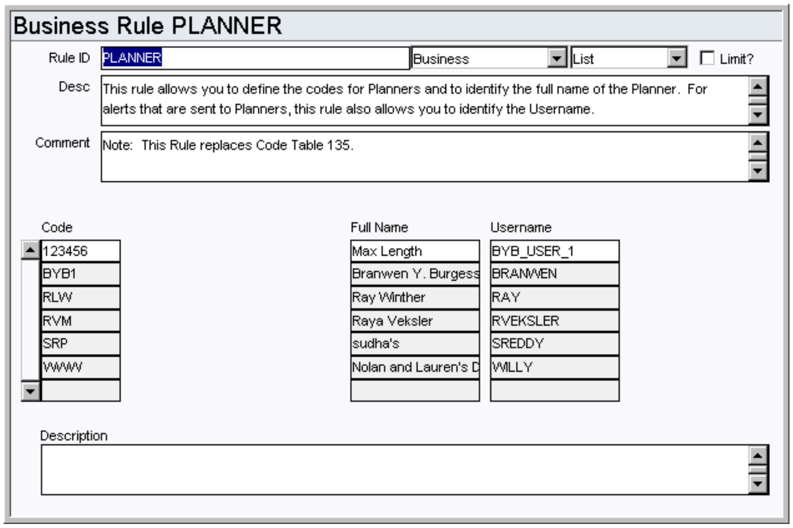
Module	Option Status
WORK ORDER	ALLOW
WORK REQUEST	ALLOW

Description: The criticality field is not available for update in the Work Order and Work Order Task modules.

Control modification of the Criticality field on Work Orders and Work Request records. The Criticality field is copied onto work records when an asset is referenced. Set the option status to Allow or Disallow to control whether or not the field can be modified. Allowing modification is appropriate if your Asset records generally have no criticality or an incorrect ciriticality assigned to them.

Default processing is DISALLOW. The Criticality field is the first Priority field on work records.

Planner Rule



Business Rule PLANNER

Rule ID: PLANNER | Business | List | ☐ Limit?

Desc: This rule allows you to define the codes for Planners and to identify the full name of the Planner. For alerts that are sent to Planners, this rule also allows you to identify the Username.

Comment: Note: This Rule replaces Code Table 135.

Code	Full Name	Username
123456	Max Length	BYB_USER_1
BYB1	Branwen Y. Burgess	BRANWEN
RLW	Ray Winther	RAY
RVM	Raya Veksler	RVEKSLER
SRP	sudha's	SREDDY
WWW	Nolan and Lauren's D	WILLY

Description:

Define planner codes, and identify the full names and usernames associated to each code. These codes are used when identifying a planner on work records.

The user associated with the code receives an alert when an event occurs where an alert would be sent to the planner. For example, when a planner plans parts against a work order and needs to be notified when the parts have arrived. This does not mean that the system is configured to send alerts regarding any record where a planner is indicated.

Code

Enter the codes for planners in the Code column. Each code must be unique.

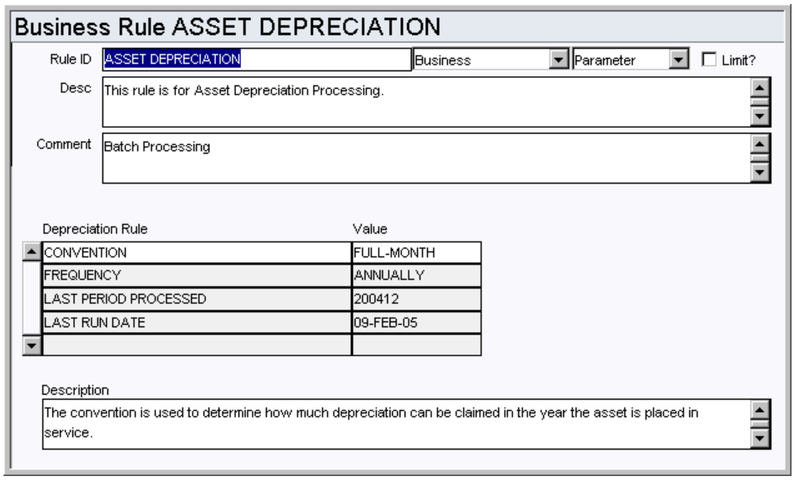
Full Name

Enter the full name of the person associated with the code. A person can be listed on more than one code.

Username

Enter the username of the person associated with the code. Since a person can be listed on more than one code, the username can be listed more than once as well.

Asset Depreciation Rule (Depreciation View)



Business Rule ASSET DEPRECIATION

Rule ID: ASSET DEPRECIATION | Business | Parameter | ☐ Limit?

Desc: This rule is for Asset Depreciation Processing.

Comment: Batch Processing

Depreciation Rule	Value
CONVENTION	FULL-MONTH
FREQUENCY	ANNUALLY
LAST PERIOD PROCESSED	200412
LAST RUN DATE	09-FEB-05

Description: The convention is used to determine how much depreciation can be claimed in the year the asset is placed in service.

This rule determines how the system will process asset depreciation costs and post them to the account log.

Once the values for the Convention and Frequency rule keys are set and the depreciation batch job has run, the settings should not be changed. Any modification will result in irreversible errors in your depreciation calculations.

CONVENTION - Select Full-Month to indicate the amount of depreciation that can be claimed in the year the asset is placed in service. Full-Month is the only option.

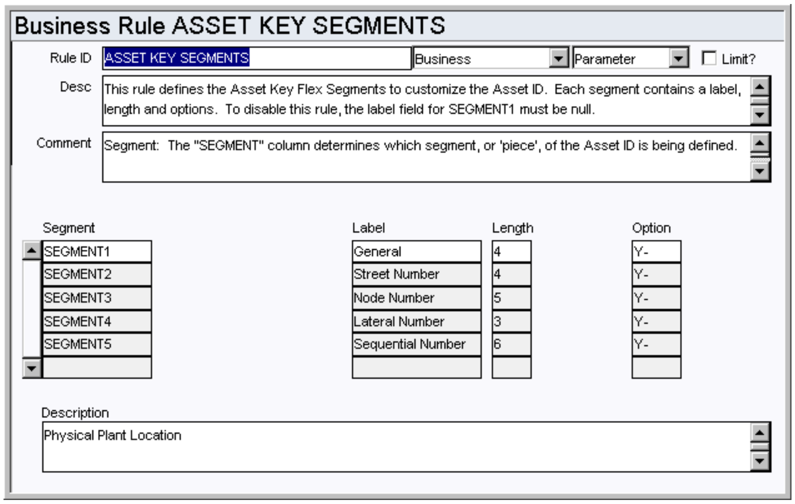
FREQUENCY - The value entered here determines how often all asset's depreciation will be written to the account log. For example, if the Last Processed Date is '200301' and the frequency is monthly, the account log will have entries of '01 2003' and in the future, the following months (i.e. 02 2003, 03 2003). Valid frequencies are Monthly, Quarterly or Annually.

LAST PERIOD PROCESSED - The Administrator should enter an initial date in this field when the rule is configured. Once the date is set the system updates the date when the account depreciation batch process runs. Do not modify this rule key after initial configuration.

The proper date format is YYYYMM.

LAST RUNTIME DATE - Last Run Date will be updated by the system whenever the batch procedure runs.

Asset Key Segments Rule (Key Segments View)



Business Rule ASSET KEY SEGMENTS

Rule ID: ASSET KEY SEGMENTS | Business | Parameter | ☐ Limit?

Desc: This rule defines the Asset Key Flex Segments to customize the Asset ID. Each segment contains a label, length and options. To disable this rule, the label field for SEGMENT1 must be null.

Comment: Segment: The "SEGMENT" column determines which segment, or 'piece', of the Asset ID is being defined.

Segment	Label	Length	Option
SEGMENT1	General	4	Y-
SEGMENT2	Street Number	4	Y-
SEGMENT3	Node Number	5	Y-
SEGMENT4	Lateral Number	3	Y-
SEGMENT5	Sequential Number	6	Y-

Description: Physical Plant Location

The Asset Key Segments business rule defines the Asset Key Flex Segments to customize Asset IDs. Each segment contains a label, length and options.

For more information regarding this feature, please refer to the Asset section of the Resource User Guide.

This functionality allows users to group Asset IDs to make it easier to locate the required asset. Since the system allows an infinite number of Asset IDs to be defined, Asset Key Segments can significantly aid in searching through very large databases.

To disable this Rule, the label field for SEGMENT1 must be null. If the rule is disabled, the Segments view does not appear in the Asset or Fleet Asset module, and the associated functionality is turned off.

Segment

The “SEGMENT” column determines which segment, or “piece”, of the Asset ID is being defined.

Label

The “LABEL” column describes the SEGMENT. It is the label displayed within the Asset module windows.

Length

The “LENGTH” column defines the maximum number of characters for the SEGMENT.

Option

The first character in the “OPTION” column indicates whether a code table is to be used: “Y” for YES, “N” for NO. The second character in the “OPTION” column is the delimiter for the SEGMENT.

To make any one SEGMENT a required field, use the Modules Administration - Forms module.

Code Tables

Code Table 25: Building Codes

Building field - Define codes for asset locations specific to the client organization. The Building field is searchable from the Search Options screen, and can be useful in finding assets when only the building location is known.

Code Table 29: Asset Types

Asset Type field - Classify assets into defined groups. Classifying assets in this manner facilitates searches by allowing queries to be conducted at a high level. The Results of Search completed at the Asset Type level will contain valuable information that can used to further narrow down user searches until the required Asset record is located. This code table is configured under the following modules: Procedure, Asset, BOM.

Code Table 40: Criticality Codes

Criticality field - The criticality number represents the relative work or safety impact of the asset. This number is later used by the system to calculate the overall priority of work orders.

The system contains default entries for Code Table 40, however, you can alter the data. We recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of priority on work orders and work requests.

Code Table 61: Sources Type for Isolation (Sources to Isolate View)

Type column - Types define the type of equipment which needs to be adjusted prior to working on a designated area. Examples of data are: Upstream Breaker, Downstream Breaker, Upstream Valve, Downstream Valve.

Code Table 62: Required Position for Isolation (Sources to Isolate View)

Lockout Position and Release Position columns - Define isolation positions to indicate the state that equipment which needs to be isolated should be in for safe working conditions. Some examples of data are: On, Off, Open, Closed.

Code Table 75 - 77: Asset Mobile fields 1-3

Asset Mobile fields - Define codes to use to filter assets when they are downloaded on a PDA.

Code Table 105: Specification Categories for Assets

Useful Life Units field - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Code Table 107: Units (Depreciation View)

Useful Life Units field - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Code Table 110: Backlog Group

Backlog Group field - Define backlog groups to group crews or to find and categorize work orders at a high level. This code table is used in the Process, Asset, Function, Work Request, Work Order, and Crew Activity Log module.

Code Table 130: Asset Interface Types - For Input / Output (Asset Interfaces View)

Interface Type field - Define codes to categorize interfaces between assets. These associations can enhance searching and grouping of asset relationships. Typical asset interface types may be Hydraulic, Electrical, Mechanical, etc.

Code Table 230: Asset Record Types

The first Asset ID field - Asset Record Type categorizes the type of Asset record at a high level. Typical Asset Record Types include “E” (equipment), “I” (instrumentation), “B” (building), and “R” (room). Users can populate Code Table 230 in accordance with the logical grouping of assets that they have created in their Asset Hierarchy. This grouping serves as a method of categorizing assets and a means searching for assets.

Note: When populating code table 230, fleet assets are "V" type. This value is hard coded and therefore does not need to be entered.

If your organization uses a Lockout/Tagout system with the Asset and Permits modules, you may also want to create "T" type assets for Tag Points and select these as the Tag Point Asset IDs when setting up the Sources to Isolate record. This will enable you to reference an asset as both a tag point and as the primary asset on one record. If the asset is not configured in this way, the system will not allow you to reference the same asset twice on one Sources to Isolate record.

Code Table 231: Location

Location field - Define codes for asset locations specific to the client organization. The Location field is searchable from the Search Options screen.

Code Table 1192: Riva Asset Type

RIVA field - Define codes for RIVA Asset types.

Copy Record

ASSET

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Activity Log From Asset

Grants the ability to create an asset activity log entry using the action on the Asset record.

Create Emergency Work Order Asset

Grants the ability to create an Emergency Work Order record using the action on the Asset record.

Create Work Order Asset

Grants the ability to create a Work Order record by selecting the action on an Asset record.

Create Work Request Asset

Grants the ability to create a Work Request record by selecting the action on an Asset record.

Create Specification

Grants access to the action that creates a specification attachment to the current Asset record.

View GIS

This enables the View GIS and Print GIS actions in modules that reference assets.

Reports

S_RPT089 - Asset Listing By Type and Class Report

Lists assets in the system.

S_RPT091 - Historic Cost Performance by Asset Report

Lists assets and work orders and their associated Labor and Material costs.

S_RPT090 - PM By Asset Report

Lists the PM Masters and subordinate PM Masters by asset.

S_RPT007 - Process Report with Asset Detail

Lists the processes created in the Process module of the Resource subsystem along with a breakdown of the assets attached.

Batch Processes

Cost Asset - sdbp_cost_asset;

Allocates costs to assets indicated on the Asset list in the Work Order Task module by creating cost adjustment records and posting accordingly. This functionality is only applicable when the Allocate Costs to Asset option in the Work Order Processing business rule is set to ON. You must either set the job run option to YES in the Batch Job Control business rule or set up an individual batch schedule for it to run automatically. The cost adjustment is not created until the work order is in closed status, so this should run after the close work order process. Please refer to the instructions under the Job Manager module for more information.

Create BOM Details - sdbp_create_bom_details.create_bom_details;

Provides an automated means of updating existing bill of materials with new stock codes based on other operations occurring in the system. Stock Code is added to the BOM ID related to Asset ID/Component ID information selected from SA_INVENTORY_LOG and SA_RECEIVING_LOG tables. Once a log record is successfully processed, it is marked as complete.

Depreciate Assets - sdbp_end_period_depreciation;

Depreciation costs are posted by batch according to settings in the Asset Depreciation business rule.

Charts

S_CHT148 - Planned Vs. Unplanned Downtime

A comparison of Planned Downtime to Unplanned Downtime for the current and the previous years. Downtime is considered to be “Planned” if the Downtime Scheduled indicator on the Asset Downtime record equals 'Y'. The data can be filtered by Plant. Other filtering options, including Department, Area and Asset, are available in the Chart Field list.

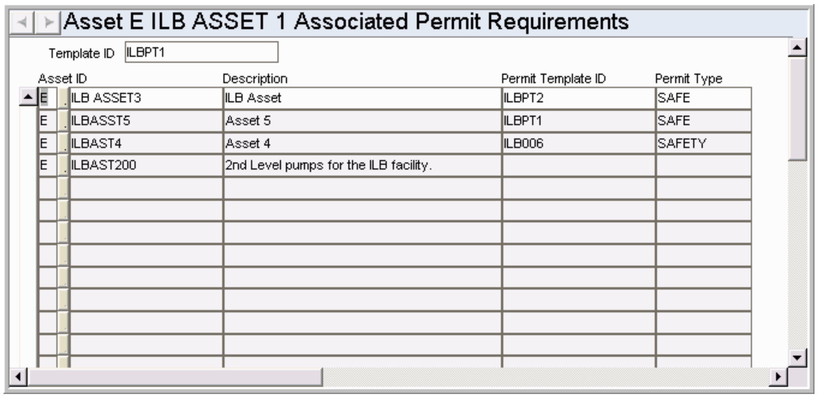
Metrics

S_MTRC6 - Percent of Planned Downtime - sdbp_metric_pct_plan_outage

This metric is to describe the relationship between Planned Outage time and the total outage time as a percentage. Planned Outage time is considered an occurrence of downtime for a given Asset if the downtime was scheduled. It provides a means to monitor and improve the ratio of planned Outage time versus total Outage time.

Views

Associated Permit Requirements



Asset E ILB ASSET 1 Associated Permit Requirements

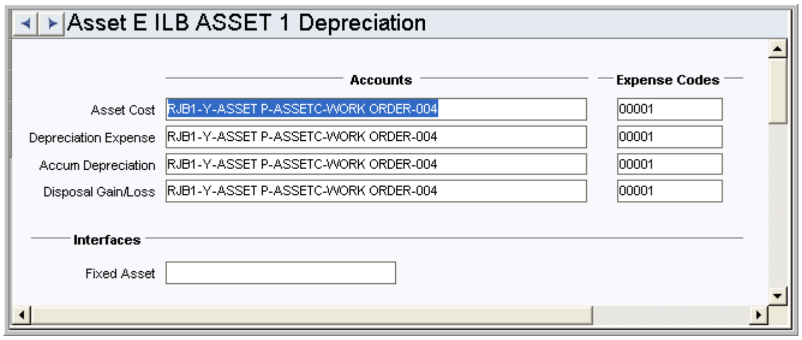
Template ID ILBPT1

Asset ID		Description	Permit Template ID	Permit Type
E	ILB ASSET3	ILB Asset	ILBPT2	SAFE
E	ILBASST5	Asset 5	ILBPT1	SAFE
E	ILBAST4	Asset 4	ILB006	SAFETY
E	ILBAST200	2nd Level pumps for the ILB facility.		

List the assets that are associated with the primary asset.

For example, if a permit is to open and inspect a complex of high pressure steam pipes, the steam may need to be diverted through a different set of pipes, or the boiler may need to be shut down. In this case both the second set of pipes and the boiler might be listed as associated assets with their own permit requirements.

Asset Depreciation Accounts



Asset E ILB ASSET 1 Depreciation

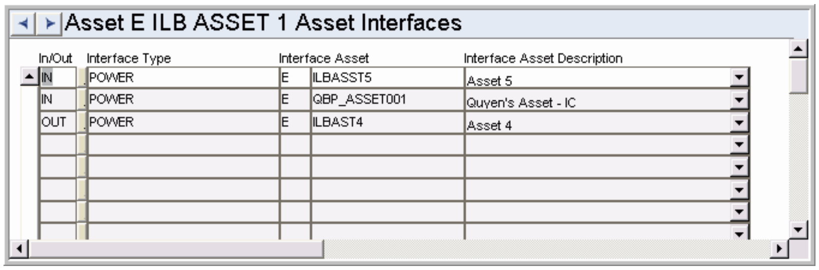
	Accounts	Expense Codes
Asset Cost	RJB1-Y-ASSET P-ASSETC-WORK ORDER-004	00001
Depreciation Expense	RJB1-Y-ASSET P-ASSETC-WORK ORDER-004	00001
Accum Depreciation	RJB1-Y-ASSET P-ASSETC-WORK ORDER-004	00001
Disposal Gain/Loss	RJB1-Y-ASSET P-ASSETC-WORK ORDER-004	00001

Interfaces

Fixed Asset

If a depreciation method is selected for the asset, you must specify accounts and expense codes to use when calculating depreciation on the Depreciation Accounts view. The system supplies the depreciation account and expense code information for the property unit defined in the Asset Class module, but different codes can be specified for this asset if necessary.

Asset Interfaces

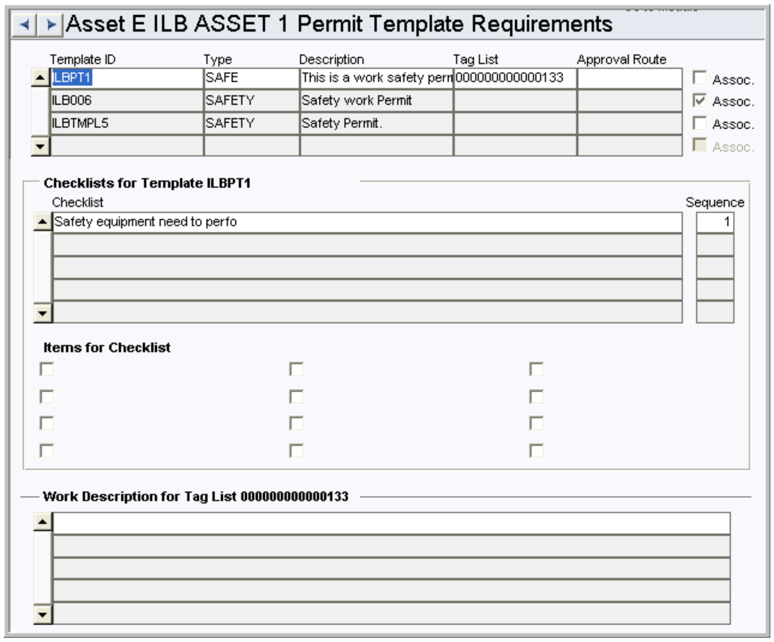


Asset E ILB ASSET 1 Asset Interfaces

In/Out	Interface Type	Interface Asset		Interface Asset Description
IN	POWER	E	ILBASST5	Asset 5
IN	POWER	E	QBP_ASSET001	Quyen's Asset - IC
OUT	POWER	E	ILBAST4	Asset 4

This view allows users to define how the displayed asset is physically related with other assets. This is achieved by identifying which assets feed into the listed asset, and which assets are fed by the listed asset. For example, a pump failure may affect hydraulic power to down-line assets, but not affect the electrical power. In this case, searching for interfaces with other assets of type 'Hydraulic' will produce a list of affected assets. Similarly, searching for interface types of 'Electrical' will produce a list of unaffected assets.

Permit Template Requirements



Template ID	Type	Description	Tag List	Approval Route	
ILBPT1	SAFE	This is a work safety perm	000000000000133		☐ Assoc.
ILB006	SAFETY	Safety work Permit			☑ Assoc.
ILBTMPL5	SAFETY	Safety Permit.			☐ Assoc.
					☐ Assoc.

Checklists for Template ILBPT1

Checklist	Sequence
Safety equipment need to perfo	1

Items for Checklist

Work Description for Tag List 000000000000133

If there are permits required for the assets, identify them in this view. Once the record is saved, you can also enter tag points and tag lists.

Asset Activity Log Module

Use the asset activity log to record asset information independent of a work order.

Fields

Sequence No.: Asset Log ID

The record number is comprised of a unique ID. Users typically have the system generate this number.

> **TABLE NAME** - SA_ASSET_ACTIVITY_LOG - The sequence number is generated for this database table.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Activity Log From Asset

Grants the ability to create an asset activity log entry using the action on the Asset record.

Create Emergency Work Order Asset

Grants the ability to create an Emergency Work Order record by selecting the action on an Asset record.

Create Work Order Asset

Grants the ability to create a Work Order record by selecting the action on an Asset record.

Create Work Request Asset

Grants the ability to create a Work Request record by selecting the action on an Asset record.

Create Specification

Grants access to the action that creates a specification attachment to the current Asset record.

Charts

S_CHT148 - Planned Vs. Unplanned Downtime

A comparison of Planned Downtime to Unplanned Downtime for the current and the previous years. Downtime is considered to be “Planned” if the Downtime Scheduled indicator on the Asset Downtime record equals 'Y'. The data can be filtered by Plant. Other filtering options, including Department, Area and Asset, are available in the Chart

Field list.

Metrics

S_MTRC6 - Percent of Planned Downtime - sdbp_metric_pct_plan_outage

This metric is to describe the relationship between Planned Outage time and the total outage time as a percentage. Planned Outage time is considered an occurrence of downtime for a given Asset if the downtime was scheduled. It provides a means to monitor and improve the ratio of planned Outage time versus total Outage time

Asset Class Module

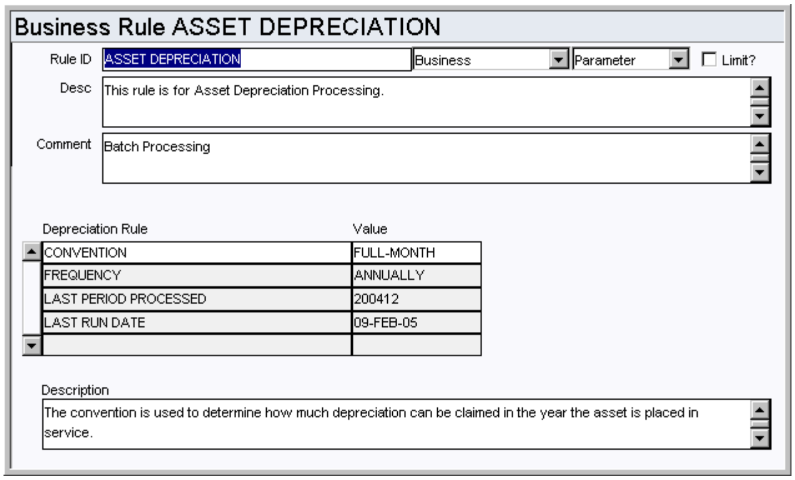
Use asset classes to group your assets, identify node types, or to create capital groups. Any classification that is created will be used on the asset record.

Define Asset Classes to group your aspects according to your organizational needs. Asset Classes should be established based on common failure characteristics and effects on the service being provided. For example, the assets listed below might be classified as indicated:

- Pumps, Filters, Instruments (Mechanical Plant)
- Sewer Pipes, Manholes, Lined Channels (Gravity Pipelines)
- Roof, Light Fittings, Floors (Buildings)
- Deck, Girders, Columns (Concrete Bridges)

Business Rules

Asset Depreciation Rule (Depreciation Parameters View)



Business Rule ASSET DEPRECIATION

Rule ID: ASSET DEPRECIATION | Business | Parameter | ☐ Limit?

Desc: This rule is for Asset Depreciation Processing.

Comment: Batch Processing

Depreciation Rule	Value
CONVENTION	FULL-MONTH
FREQUENCY	ANNUALLY
LAST PERIOD PROCESSED	200412
LAST RUN DATE	09-FEB-05

Description: The convention is used to determine how much depreciation can be claimed in the year the asset is placed in service.

This rule determines how the system will process asset depreciation costs and post them to the account log.

Once the values for the Convention and Frequency rule keys are set and the depreciation batch job has run, the settings should not be changed. Any modification will result in irreversible errors in your depreciation calculations.

CONVENTION - Select Full-Month to indicate the amount of depreciation that can be claimed in the year the asset is placed in service. Full-Month is the only option.

FREQUENCY - The value entered here determines how often all asset's depreciation will be written to the account log. For example, if the Last Processed Date is '200301' and the frequency is monthly, the account log will have entries of '01 2003' and in the future, the following months (i.e. 02 2003, 03 2003). Valid frequencies are Monthly, Quarterly or Annually.

LAST PERIOD PROCESSED - The Administrator should enter an initial date in this field when the rule is configured. Once the date is set the system updates the date when the account depreciation batch process runs. Do not modify this rule key after initial configuration.

The proper date format is YYYYMM.

LAST RUNTIME DATE - Last Run Date will be updated by the system whenever the batch procedure runs.

Code Tables

Code Table 107: Units (Depreciation Parameters View)

Useful Life Units field - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Code Table 601: Asset Class Type

Type field - Define class types.

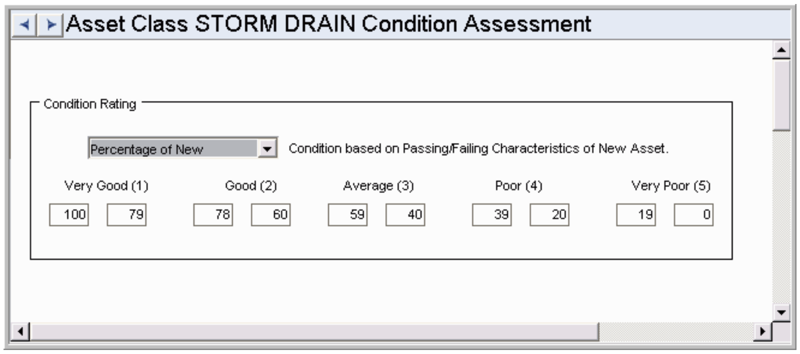
Copy Record

ASSETCLS - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Views

Condition Assessment



Asset Class STORM DRAIN Condition Assessment

Condition Rating

Percentage of New — Condition based on Passing/Failing Characteristics of New Asset.

Very Good (1)		Good (2)		Average (3)		Poor (4)		Very Poor (5)	
100	79	78	60	59	40	39	20	19	0

Basis (Condition Assessment View)

Percentage of New

Using this basis, the condition of the asset is based on passing or failing characteristics of a new asset. A "like new" asset would pass all characteristics and be awarded the maximum points resulting in a 100% rating. A severely broken asset would fail all characteristics of a new asset and be awarded zero points resulting in a 0% rating.

The percentage ratings are translated to the 1-5 condition grade scale. A range of 100% to 80% could be equated to a Condition Grade of 1, 80% to 60% equated to a 2, and so on. The system is delivered with the default scale shown above, however you can change the ranges when you configure each asset class record. Ranges should not overlap.

General Weighted

Using this basis, the condition of the asset is based on a general assessment of potential defects using a weighted scale of 1 - 5. Each potential defect is assigned a weight value based on the impact to service level. A potential defect that has significant impact on the service level will have a higher weight (e.g., .30) than a defect with minimal impact on the service level (e.g., .15). A "like new" asset would exhibit none of the potential defects and be awarded the minimum points resulting in a rating of 1. A severely broken asset would exhibit the highest severity of each potential defect and would be awarded the maximum points resulting in a rating of 5.

With this method the ratings are already on a scale of 1 - 5, however, fractional values might also result since fractional grades might be noted for a given condition. Therefore, the results of the General Weighted method also use a standard translation to the Condition Grade scale. For example, a range of 1 - 2 is equated to a condition grade of 1, a range of 2 - 3 equated to a condition grade of 2, and so on. The system is delivered with a default scale.

Deficiency Scoring

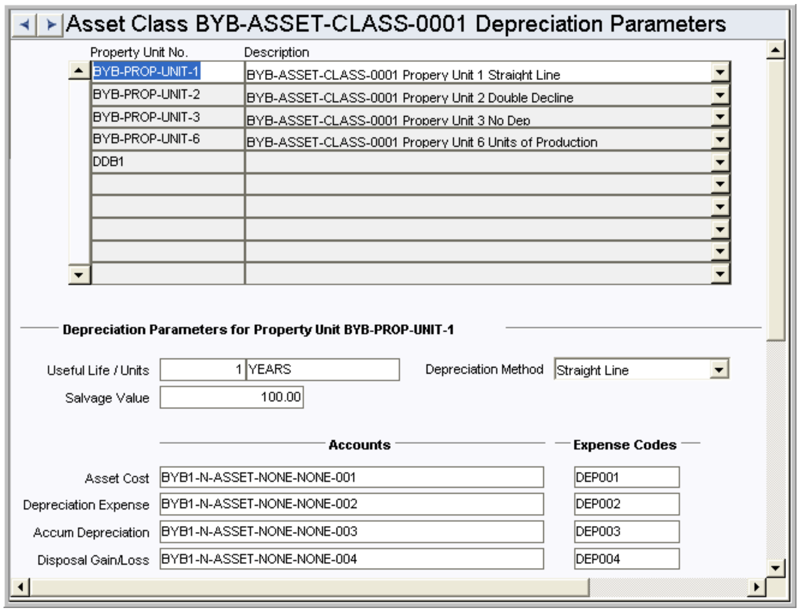
Using this basis, the asset condition is based on accumulated defect points. As with the General Weighted method, each potential defect is assigned a weight value based on the impact to service level. Then each defect is broken down into specific severity levels with a point value assigned to each. The more severe the nature of the defect, the higher the associated point value. Normally, the point scale is a range of 1-10, allowing for at least 10 different definitions or levels of severity.

Unlike the General Weighted method, each defect and severity identified during Inspection is accumulated for the final "deficiency score". That is, if there are 5 defects with a severity of 2 points each, then the deficiency score for the asset would be 10. A "like new" asset would exhibit none of the potential defects and be awarded a deficiency score of 0 (i.e., absolutely no defects were noted). A severely broken asset would exhibit the highest severity of each potential defect, probably numerous times, and would be awarded a higher deficiency score.

With this method you want to set up ranges of scores that translate into the 1-5 condition grade scale. For example, a range of 0-100 could be equated to a Condition Grade of 1, 101-200 equated to a 2, and so on. The system is delivered with the default scale shown above, however you can change the ranges when you configure each asset class record. Ranges should not overlap.

Regardless of the rating basis chosen, the Only whole numbers can be entered in the limit fields. Choose the scoring basis to use for this class of assets.

Depreciation Parameters



Asset Class BYB-ASSET-CLASS-0001 Depreciation Parameters

Property Unit No.	Description
BYB-PROP-UNIT-1	BYB-ASSET-CLASS-0001 Propery Unit 1 Straight Line
BYB-PROP-UNIT-2	BYB-ASSET-CLASS-0001 Propery Unit 2 Double Decline
BYB-PROP-UNIT-3	BYB-ASSET-CLASS-0001 Properv Unit 3 No Dep
BYB-PROP-UNIT-6	BYB-ASSET-CLASS-0001 Propery Unit 6 Units of Production
DDB1	

Depreciation Parameters for Property Unit BYB-PROP-UNIT-1

Useful Life / Units: 1 YEARS

Depreciation Method: Straight Line

Salvage Value: 100.00

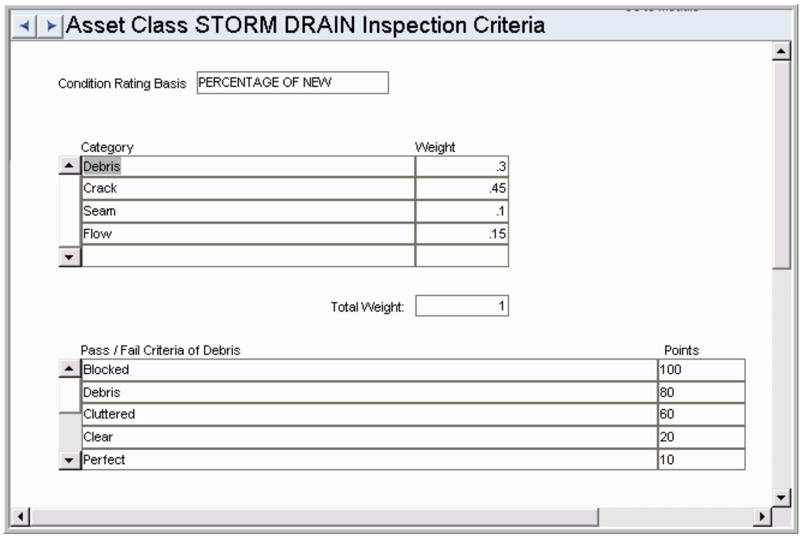
	Accounts	Expense Codes
Asset Cost	BYB1-N-ASSET-NONE-NONE-001	DEP001
Depreciation Expense	BYB1-N-ASSET-NONE-NONE-002	DEP002
Accum Depreciation	BYB1-N-ASSET-NONE-NONE-003	DEP003
Disposal Gain/Loss	BYB1-N-ASSET-NONE-NONE-004	DEP004

Define depreciation parameters for individual property units within the asset class.

Inspection Criteria

Define the criteria and scoring that will be used to assess this class of asset.

The inspection criteria to be used when assessing assets in the given Asset Class is entered in the Inspection Criteria view. Generally, inspection criteria consists the category or high-level classifications that are weighted, and the specific characteristic or defect severity that is scored.



Asset Class STORM DRAIN Inspection Criteria

Condition Rating Basis: PERCENTAGE OF NEW

Category	Weight
Debris	.3
Crack	.45
Seam	.1
Flow	.15

Total Weight: 1

Pass / Fail Criteria of Debris	Points
Blocked	100
Debris	80
Cluttered	60
Clear	20
Perfect	10

Each condition rating basis uses a different technique for the scoring of the assessment and therefore has slight variations on how the data is entered and displayed.

Condition Rating Basis

This non-updatable field displays the condition rating basis selected for the asset class.

Category/Defect Type

If the condition basis is Percent of New then the label for this field is Category, otherwise the label is Defect Type. This field simply represents the type or category of defect.

Weight

This field is used to indicate the rating for each deficiency entered in the Category/ Defect Type field. Values entered can not be greater than 1, and the field is limited to two decimal places. The total weight should be equal to 1 once you have entered all of the deficiencies.

Pass Fail Criteria and Points

If the condition basis is Percent of New then the labels for the fields at the bottom of the screen are Pass Fail Criteria and Points.

When configuring the inspection criteria these fields should be populated with text describing a pass/fail condition, and an assigned point value for the highlighted Category. The criteria entered here should describe characteristics of a new asset with each category broken down into the specific characteristics that a new piece of equipment would exhibit. Each characteristic should then be assigned a point value to allow for certain characteristics to contribute more than others to the cumulative point total. There can be an unlimited number of characteristics for each category.

Defect Classification and Grade

If the condition basis is General Weighted then the labels for the fields at the bottom of the screen are Defect Classification and Grade.

General Weighted: This assessment basis is similar to Deficiency Scoring in that the asset's condition is based on defects, not on characteristics of a new asset. Each Defect Type is broken down into 5 classifications each with a corresponding point value of 1 through 5. The point value of 1 usually equates to No Defects and 5 usually equates to Failed.

Users are not allowed to insert additional records or delete from the 5 records inserted by the system. The user is only able to modify the descriptive text for each attribute record.

Defect Severity and Points

If the condition basis is Deficiency Scoring then the labels for the fields at the bottom of the screen are Defect Severity and Points.

Deficiency Scoring: This assessment basis is similar to General Weighted except that each Defect Type is broken down into an unlimited number of severities each with a corresponding point value. Typically, no more than 10 severities are used and the points associated to each are 1 - 10 with 1 being the least severe condition and 10 being the most severe.

Asset Inspection Data Module

Use the Asset Inspection Data module to define Inspection criteria for your organization’s assets.

Fields

Sequence No.: Inspection ID

The record number is comprised of a unique ID (Ex. “INS0000008”). Users typically select automatic generation of this number.

TABLE NAME - SA_ASSET_INSPECTION - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 23: Unit of Measure

Inspection Length and Inspection Area fields - Define codes for the weather conditions that may affect your inspections.

Code Table 181: Asset Inspection Type

Type field - Determine codes for the types of asset inspections that are done on your assets. For example, you may do visual or video inspections.

Code Table 182: Asset Inspection Reason

Reason field - Define reason codes for the asset inspections within your organization.

Code Table 183: Weather Condition

Weather Condition field - Define codes for the weather conditions that may affect your inspections.

Code Table 244: Ground Condition

Ground Condition field - Define codes for the ground conditions that may affect your inspections.

Code Table 245: Asset Inspection Severity (Observations View)

Severity Field - Define codes for the severity of your inspections.

Reports

S_RPT150 - Asset Inspection Worksheet

Lists Component ID information created in the Component ID module.

The Asset Class Inspection Criteria check boxes that appear on the report are dynamic. These are driven by the Inspection Criteria used for the Asset. To view or change this data, open the Asset Class module then open the appropriate Asset Class record. Select Condition Assessment then Inspection Criteria from the Views list on that Asset Class record. The Inspection Criteria view shows the Categories or Defects with more detailed information located at the bottom of the screen. You can add or remove Categories or Defects in this view. The options on the report will then change accordingly.

Operational Data Module

Establish operating limits for assets and validate data against those limits in the Operational Data module. During validation, data readings that fall outside of expected limits cause alerts to be sent to the person responsible for the asset. The planner can then review the reading and, if necessary, initiate a work request to repair the measurement device or asset. The planner can then review the data and resolve the out of range condition. The Operational Data module also includes Data Import / Export Actions that enable you to import large amounts of data from external files. The Asset Data module consists of two sub-modules. The Operational Tolerance sub-module controls the data to be collected and defines the parameters under which an asset is deemed to be functioning normally, outside of which, action should be taken.

Operational Tolerance Module

Fields

Sequence No.: Operational Tolerance ID

The record number is comprised of a Measurement ID (Ex. "ILB OPTOL 1"). It is typical to have this set to be created by the user.

TABLE NAME - SA_OPERATIONAL_TOLERANCE - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 70: Measurement Type

Type field - Types define the measurement types, or the characteristics being measured, such as temperature, pressure or flow. These values are user defined and are linked to user-created Code Tables that further define these characteristics.

Copy Record

OPERTOL - COPY RECORD

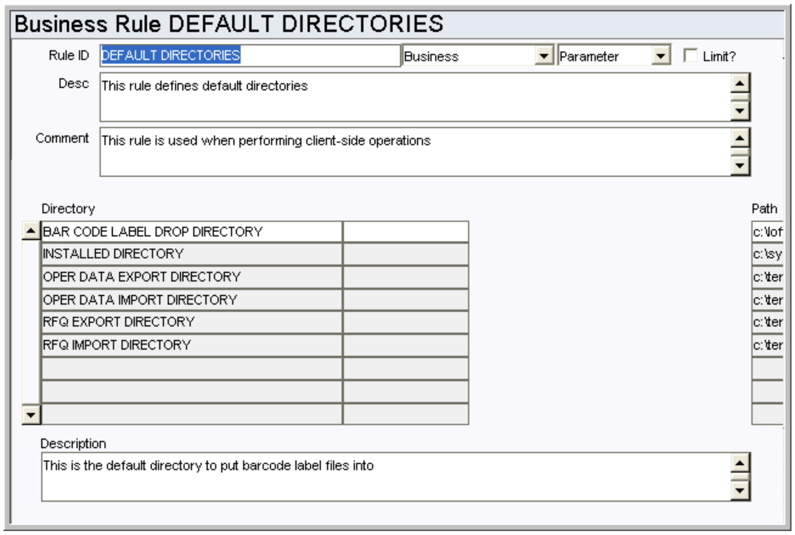
Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Asset Data Module

After you have established Measurement records and associated them with Asset IDs, you can use the Asset Operational Data module to record and review operational measurements for the asset. Values recorded out of the normal operating range (inner range) for the asset display an out of range indication and the system sends an alert to the alert user indicated on the Operational Tolerance record.

Business Rules

Default Directories Rule



Rule ID: DEFAULT DIRECTORIES — Business — Parameter — ☐ Limit?

Desc: This rule defines default directories

Comment: This rule is used when performing client-side operations

Directory		Path
BAR CODE LABEL DROP DIRECTORY		c:\lof
INSTALLED DIRECTORY		c:\sy
OPER DATA EXPORT DIRECTORY		c:\ter
OPER DATA IMPORT DIRECTORY		c:\ter
RFQ EXPORT DIRECTORY		c:\ter
RFQ IMPORT DIRECTORY		c:\ter

Description: This is the default directory to put barcode label files into

The Default Directories rule defines default locations for files outside of the Oracle Utilities Work and Asset Management database and is used for saving or calling files from the client computer. Individual users can establish settings in their individual User Profile record in the Administration subsystem that will supersede these business rule settings.

The Default Directories rule should not be confused with the similar Default File Locations rule, which is used to define specific file names and the paths leading to them.

Directory

BAR CODE LABEL DROP DIRECTORY - default directory to put bar code label files into.

INSTALLED DIRECTORY - directory where the application files are located.

OPER DATA EXPORT DIRECTORY - default directory for exporting Operational Data files.

OPER DATA IMPORT DIRECTORY - default directory for importing Operational Data files.

RFQ EXPORT DIRECTORY - default directory for exporting RFQ files.

RFQ IMPORT DIRECTORY - default directory for importing RFQ files.\

COMPONENT UPLOAD DIRECTORY - directory where files are stored when they are uploaded to support receiving multiple trackable components.

Path

This is the hard drive storage location for the corresponding file.

Component ID Module

Breaking down parts to the nuts and bolts level does not merit creating Component records. Instead, those types of stock items belong on a Bill of Materials (list of parts needed to maintain an item) which may in turn will be attached to Component and/or Asset records.

Fields

Sequence No.: Component ID

The record number is comprised of a unique ID (Ex. "CMP001"). Users typically allow this number to be created manually.

> **TABLE NAME** - SA_COMPONENT_ID - The database table that the sequence number is generated for.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Stock Code

Since components are stock items, each Component ID requires a valid stock code. The same stock code may be referenced on other Component records, enabling the simple tracking of similar parts for swapping when failure occurs. For example, if there are two identical batteries in stock, there will be two different Component ID records, both sharing the same stock code.

Serial No.

In addition to the Component ID and the stock code, the item's Serial Number may also be entered on the Component record.

Current Location

Current Location information enables you to easily track the component. Options for Status include: Installed (Specify the Asset ID for the asset that it is installed on), In Stores (Specify the storeroom where it is located), In Repair, Inactive, Pending Disposition, Scrapped, Sold, and Outside Repair.

After a component is entered, the system maintains its status (depending on the business rule settings), setting it to one of these statuses as items are issued and returned to and from the storeroom. You can also set the status manually as appropriate.

Bill of Materials

A Bill of Materials (BOM) may be attached to the Component record. By referencing a BOM, it may be later used as a pick-list when planning parts on a related work order.

Last Install Date

The Last Install date is maintained by the system. Each time the Component ID is installed into an asset, the system updates the Last Install field with the current date.

Code Tables

Code Table 221: Component Types

Type field - Component Types classify components into groups. Classifying components in this manner facilitates searches by allowing queries to be conducted at a high level. The Results of Search completed at the Component Type level will contain valuable information that can used to further narrow down user searches until the required component is located.

Code Table 63: Tag Types

Tag Type field (blank field next to Tagged check box) - Define the types of tags or plate names that an asset may be tagged with.

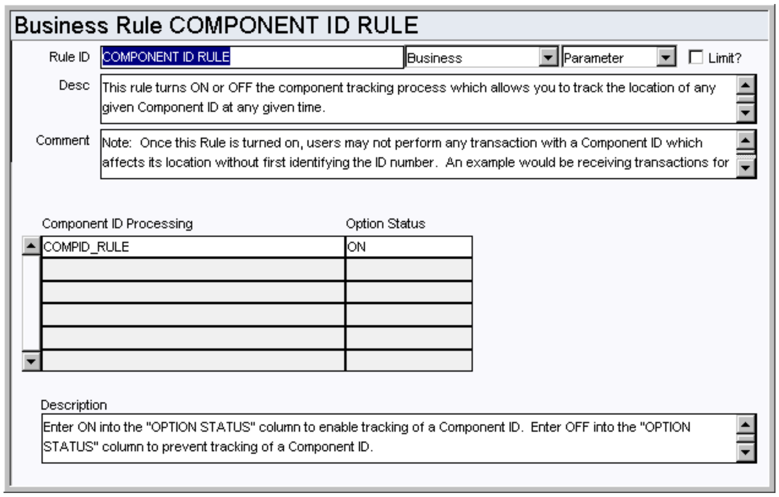
Code Table 230: Asset Record Types

The first Asset ID field - Asset Record Type categorizes the type of Asset record at a high level. Typical Asset Record Types include “E” (equipment), “I” (instrumentation), “B” (building), and “R” (room). Users can populate Code Table 230 in accordance with the logical grouping of assets that they have created in their Asset Hierarchy. This grouping serves as a method of categorizing assets and a means searching for assets.

Fleet Assets are “V” type. This value is hard coded in the system and therefore does not need to be entered.

Business Rules

Component ID Rule



Business Rule COMPONENT ID RULE

Rule ID: COMPONENT ID RULE | Business | Parameter | ☐ Limit?

Desc: This rule turns ON or OFF the component tracking process which allows you to track the location of any given Component ID at any given time.

Comment: Note: Once this Rule is turned on, users may not perform any transaction with a Component ID which affects its location without first identifying the ID number. An example would be receiving transactions for

Component ID Processing	Option Status
COMPID_RULE	ON

Description: Enter ON into the "OPTION STATUS" column to enable tracking of a Component ID. Enter OFF into the "OPTION STATUS" column to prevent tracking of a Component ID.

Control component tracking. The component tracking functionality (discussed below) allows users to track the location of any given Component ID at any given time.

Functionality: Component ID is the third and final level in the Asset Hierarchy. Components are stock items such as pumps, compressors, shafts, and other items, which may be installed and de-installed into equipment. They are also defined as the major part or parts that make up an asset. Components may be interchanged with like parts (such as an old pump being replaced with a new one). Since components are stock items, each Component ID requires a valid stock code. The same stock code may be referenced on more than one Component ID record, enabling similar parts to be swapped and tracked when repair is needed or failure occurs. In order to simplify the maintenance of Components, statuses can be tracked automatically.

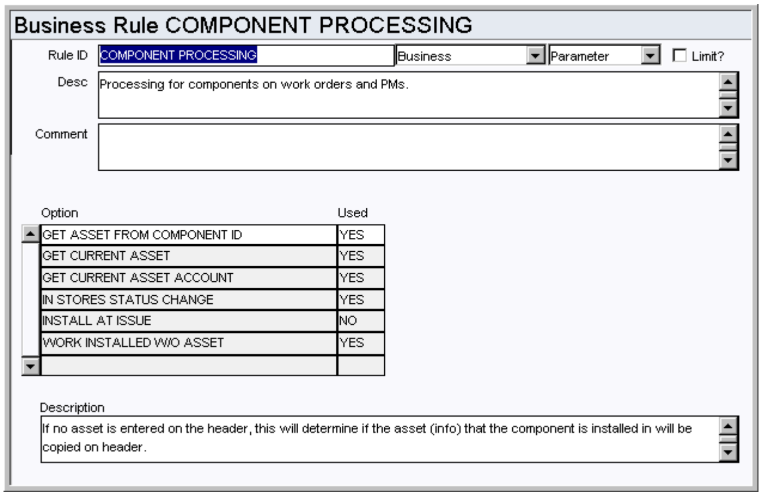
In order to install a Component ID on an asset the Asset ID is entered on the Component record. This action sets the Component ID status as Installed. When the same stock code is issued (as on the Component ID record) from Stores, the system automatically de-installs the old Component ID (setting its status to Pending Disposition) and marks the issued Component ID as Installed on the asset. The status of the de-installed component must then be reviewed to decide whether to repair it, scrap it (making it inactive), or return it to stores. By default all the above functionality is configured to ON.

Configuration ID Processing and Option Status

The Component ID Rule has two states, ON and OFF. Once this Rule is turned on, users can not perform any transaction with a Component ID that affects it's location without first identifying the ID number. An example would be receiving transactions for trackable stock requires a pre-defined Component ID before the receiving transaction may be completed.

When the configuration option is set to OFF the tracking functionality of components bypassed.

Component Processing Rule



Business Rule COMPONENT PROCESSING

Rule ID: COMPONENT PROCESSING | Business | Parameter | ☐ Limit?

Desc: Processing for components on work orders and PMs.

Comment:

Option	Used
GET ASSET FROM COMPONENT ID	YES
GET CURRENT ASSET	YES
GET CURRENT ASSET ACCOUNT	YES
IN STORES STATUS CHANGE	YES
INSTALL AT ISSUE	NO
WORK INSTALLED W/O ASSET	YES

Description: If no asset is entered on the header, this will determine if the asset (info) that the component is installed in will be copied on header.

Determine the processing for components on work orders and PMs. The Options listed can be enabled or disabled by entering YES or NO in the Used field.

Option and Used

GET ASSET FROM COMPONENT ID - Processing for components on work orders and PMs. If this option is set to yes and no asset is entered on the header, but a Component ID is entered then the asset that the component is installed in will be copied on to the header.

GET CURRENT ASSET - Processing for Benchmarks. If this option is set to YES and no asset is entered on the Benchmark, this key determines if the asset that the component is installed in is put on the work order.

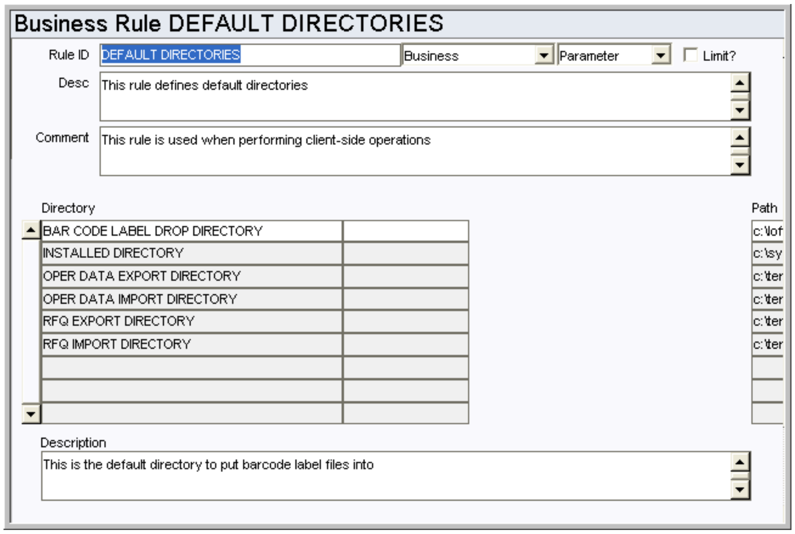
GET CURRENT ASSET ACCOUNT - Processing for Benchmarks. If no asset is entered on the benchmark, this key determines whether or not the account number for the asset that the component is installed on can be used.

INSTALL AT ISSUE - Defaulted to YES. This can only be set to NO if the Repairable Processing Rule key, Enhanced Material Disposition, is set to ON. If this option is set to NO, material disposition items will have the status of Pending Disposition when issued from the Checkout module and all status changes must be made in the Material Disposition module.

WORK INSTALLED W/O ASSET - Processing for components on work orders and work requests. This option will allow work orders and work request to enter an installed component without entering the asset.

IN STORES STATUS CHANGE - Set this option to YES to allow the Component ID status to be changed to or from “In Stores” from the Component ID module. If this rule key is set to NO users cannot change the status to “In Stores” and they cannot remove Components from “In Stores” status. This status change does not have any impact on the On Hand quantity or the Average Unit Price in the storeroom identified on the Component ID.

Default Directories Rule



Business Rule DEFAULT DIRECTORIES

Rule ID: DEFAULT DIRECTORIES | Business | Parameter | ☐ Limit?

Desc: This rule defines default directories

Comment: This rule is used when performing client-side operations

Directory		Path
BAR CODE LABEL DROP DIRECTORY		c:\lof
INSTALLED DIRECTORY		c:\sy
OPER DATA EXPORT DIRECTORY		c:\ter
OPER DATA IMPORT DIRECTORY		c:\ter
RFQ EXPORT DIRECTORY		c:\ter
RFQ IMPORT DIRECTORY		c:\ter

Description: This is the default directory to put barcode label files into

Define default directories for use when performing client-side operations.

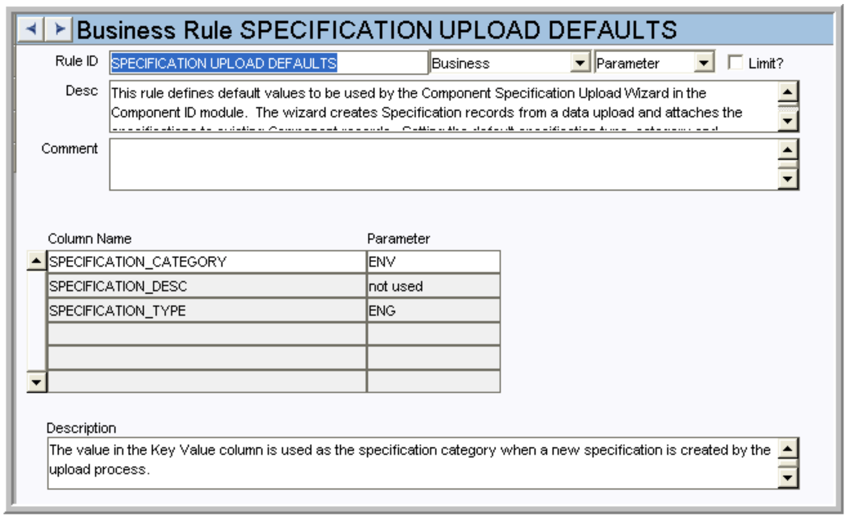
Directory

COMPONENT UPLOAD DIRECTORY - This is the directory where files are stored when they are uploaded to support receiving multiple trackable components.

Path

This is the hard drive storage location for the corresponding file.

Specification Upload Defaults



Business Rule SPECIFICATION UPLOAD DEFAULTS

Rule ID: SPECIFICATION UPLOAD DEFAULTS | Business | Parameter | ☐ Limit?

Desc: This rule defines default values to be used by the Component Specification Upload Wizard in the Component ID module. The wizard creates Specification records from a data upload and attaches the

Comment:

Column Name	Parameter
SPECIFICATION_CATEGORY	ENV
SPECIFICATION_DESC	not used
SPECIFICATION_TYPE	ENG

Description: The value in the Key Value column is used as the specification category when a new specification is created by the upload process.

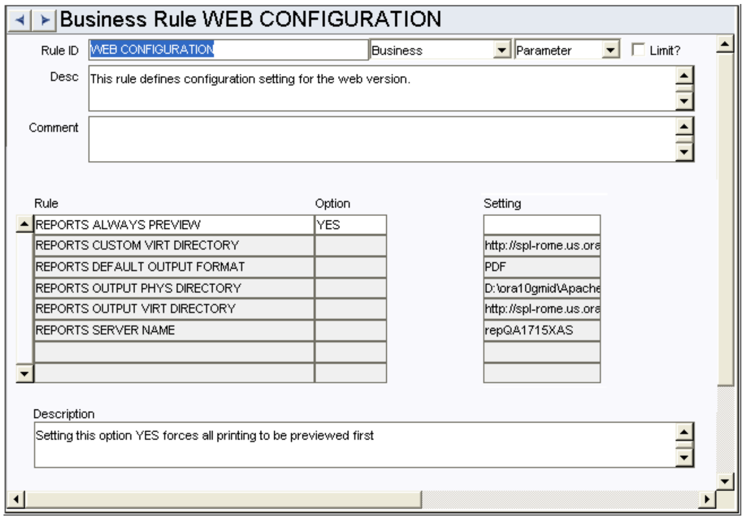
This rule defines default values to be used by the Component Specification Upload Wizard in the Component ID module. The wizard creates Specification records from a data upload and attaches the specifications to existing Component records. Setting the default specification type, category and description in this rule ensures that new Specification records can be created by the upload process without errors.

The combination of specification type and category must match a type and category combination defined in the Specification Template module.

To use this functionality, sequence numbering for SA_SPECIFICATION_DATA and SA_COMPONENT_ID must be system generated. Open the Sequence Numbers module and make sure that there is a check in the Sys column for these tables.

Note that the SPECIFICATION_DESC parameter uses the Description as the user entered value rather than the Key Value. This is different than the other two parameters which use Key Value as the user defined string.

Web Configuration Rule



Business Rule WEB CONFIGURATION

Rule ID: WEB CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule defines configuration setting for the web version.

Comment:

Rule	Option	Setting
REPORTS ALWAYS PREVIEW	YES	
REPORTS CUSTOM VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS DEFAULT OUTPUT FORMAT		PDF
REPORTS OUTPUT PHYS DIRECTORY		D:\ora10gmid\Apache
REPORTS OUTPUT VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS SERVER NAME		repQA1715XAS

Description: Setting this option YES forces all printing to be previewed first

Define web configuration settings.

Rule, Option, and Setting

Enter YES or NO in the Option column for each of the rule keys. Also enter the file path or format (as appropriate) in the Setting column.

UPLOAD DIRECTORY - This is the directory where files are stored when they are uploaded to support receiving multiple trackable stock items.

Copy Record

COMPID - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Work Order Component

Grants the ability to create a Work Order record by selecting the action on a Component record.

Create Work Request Component

Grants the ability to create a work request by selecting the action on a Component record.

Reports

S_RPT011 - Component ID Report

Lists Component ID information created in the Component ID module.

Compatible Structure Module

Compatible units can be grouped together into larger units called compatible structures. Before a compatible unit can be included on a Compatibles Structure record, it must be defined in the Compatible Unit module.

Each Compatible Structure record consists of a number of compatible units along with their associated labor and equipment estimates. Like compatible units, compatible structures can help provide consistency in the design and construction of capital projects and assist in compliance with Federal Energy Regulatory Commission (FERC) accounting and reporting requirements.

Fields

Sequence No.: Compatible Structure

The record number is comprised of a unique ID (Ex. "CS0001"). Compatible Structure numbers can be set to be system generated or created manually.

TABLE NAME - SA_COMPATIBLE_STRUCTURE- The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 23: Unit of Measure

Inspection Length and Inspection Area fields - Define codes for the weather conditions that may affect your inspections.

Code Table 225: Compatible Unit Business Unit

Business Unit field - Define the Business Unit using compatible units.

Code Table 226: Compatible Unit Class

Class field - Code table linked to the Business Unit.

Code Table 227: Compatible Unit Equipment Group

Equipment Group field - Code table linked to the Class.

Copy Record

COMPSTRU

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Update Active CU/CS

Allows users to update active compatible units or compatible structures.

Compatible Unit Module

Compatible units provide consistency in the design and construction of capital projects. Compatible units may also assist in compliance with Federal Energy Regulatory Commission (FERC) accounting and reporting requirements.

To fully configure compatible unit functionality the following steps must be completed:

1. Set compatible units business rules, code tables and functions as outlined in these chapters.

   Compatible Unit Module
   Compatible Structure Module
   Regulatory Account Module
   Work Order Task Module

2. Define stock items as CU materials by selecting the Reconcile to CU check box on the stock item if applicable.
3. Set up regulatory accounts. Please refer to the Regulatory Account chapter in the Compatible Units User Guide for more information.
4. Define compatible units with the appropriate functions, difficulties, usage codes, asset classes, and property units referenced. Please refer to the Compatible Units chapter in the Compatible Units User Guide for more information.
5. Define compatible structures. Please refer to the Compatible Structures chapter in the Compatible Units User Guide for more information.

When testing configuration settings, please follow the completion guidelines for work order tasks to see how costs are applied and posted for compatible units.

Fields

Sequence No.: Compatible Unit ID

The record number is comprised of a unique ID (Ex. “CU0001”). Compatible Unit IDs can be set to be system generated or created manually.

TABLE NAME - SA_COMPATIBLE_UNIT- The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 22: Vendor Characteristic Types (Characteristics View in Vendor module)

Contractor field - Define contractors which can be added on in the Compatible Units Contractor Bids view. The values are carried over when the compatible unit is referenced on work records.

Code Table 23: Unit of Measure

Inspection Length and Inspection Area fields - Define codes for the weather conditions that may affect your inspections.

Code Table 224: Compatible Unit Difficulty (Functions View)

Difficulty field - Define degrees of difficulty for functions. You can use the Difficulty and Function fields together to define several degrees of difficulty for the same function, for example, a normal installation and a difficult installation, but each function/difficulty combination must be unique. The list of values associated with the Difficulty field displays only selections that have not yet been associated with the Function for this Compatible Unit record.

Code Table 225: Compatible Unit Business Unit

Business Unit field - Define business units according to your organizational practices. Code table 226 is linked to this table to define classes. Other linked tables can be created to further define other business units. For example, create a code for Water, then link another table to define types of water such as “above ground” or “under ground.”

Code Table 226: Compatible Unit Class

Class field - Code table linked to the Business Unit.

Code Table 227: Compatible Unit Equipment Group

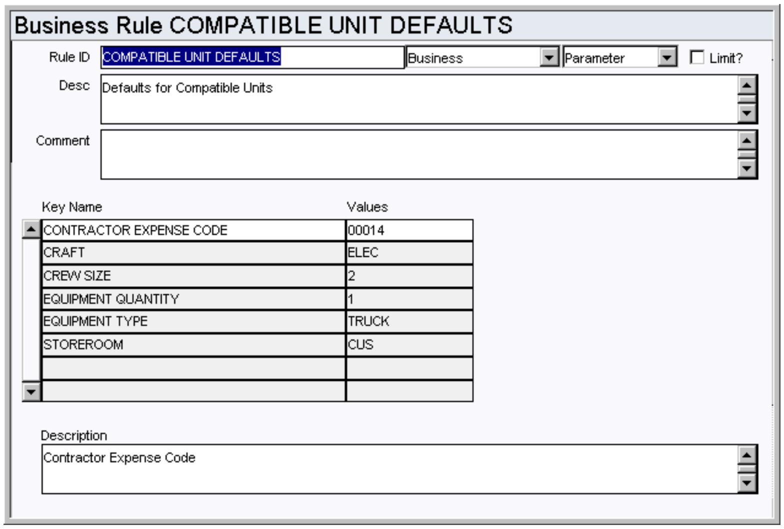
Equipment Group field - Code table linked to the Class.

Code Table 1197: Compatible Unit Type

CU Type field - Define type codes for compatible units.

Business Rules

Compatible Unit Defaults Rule



Business Rule COMPATIBLE UNIT DEFAULTS

Rule ID: COMPATIBLE UNIT DEFAULTS — Business — Parameter — ☐ Limit?

Desc: Defaults for Compatible Units

Comment:

Key Name	Values
CONTRACTOR EXPENSE CODE	00014
CRAFT	ELEC
CREW SIZE	2
EQUIPMENT QUANTITY	1
EQUIPMENT TYPE	TRUCK
STOREROOM	CUS

Description: Contractor Expense Code

The Compatible Unit Defaults Rule sets the default values for estimating equipment and labor rates for compatible units. When a new is inserted, the system uses the values from this rule to populate the Equipment view and to calculate duration, equipment and labor estimates.

CONTRACTOR EXPENSE CODE - This sets the default expense code that is charged when contractor costs are applied from a work order. Contractors are entered in the Contractor Supplied view in the Work Order Task module.

CRAFT - When compatible unit is entered on the CU Worksheet, the system automatically creates an entry on the Items Worksheet for every compatible unit, plus a line for labor estimates. The craft entered in the Value field here will be defaulted on the Items Worksheet for the labor estimates. The craft can be changed later on the worksheet, if necessary.

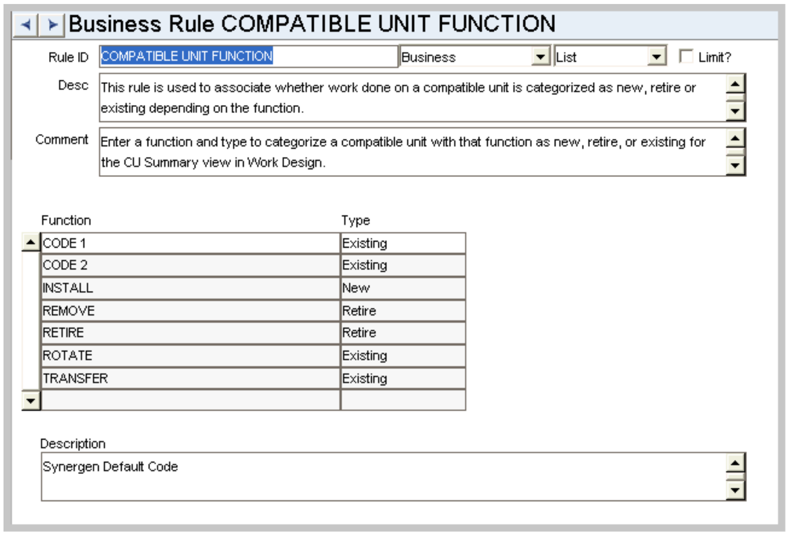
CREW SIZE -The crew size used to estimate duration (duration = manhours/crew size).

EQUIPMENT QUANTITY - The quantity used to estimate default equipment cost (cost = rate x quantity).

EQUIPMENT TYPE - Select an Equipment Type from the list of values controlled by the Other Direct Charges business rule. You can enter any Equipment Type. If a default Equipment Type is defined here, the system inserts a line with that type into each new Equipment view. Any additional equipment that you add to the Compatible Units record must be defined in the Direct Charges Rule with a Units value of Hour or Hourly.

STOREROOM - The storeroom used when materials from a CU are added to the Work Order Task Item Worksheet. If the stock item does not exist in this default storeroom, the system searches for the stock item in all other active storerooms. If the stock item is found in another storeroom, the system uses that storeroom. If the stock item is found in more than one storeroom, the system does not enter a value but informs you that some material items on the Item Worksheet do not include a valid storeroom. You must then open the Item Worksheet and select a storeroom from the list of values.

Compatible Unit Function Rule



Business Rule COMPATIBLE UNIT FUNCTION

Rule ID: COMPATIBLE UNIT FUNCTION | Business | List | ☐ Limit?

Desc: This rule is used to associate whether work done on a compatible unit is categorized as new, retire or existing depending on the function.

Comment: Enter a function and type to categorize a compatible unit with that function as new, retire, or existing for the CU Summary view in Work Design.

Function	Type
CODE 1	Existing
CODE 2	Existing
INSTALL	New
REMOVE	Retire
RETIRE	Retire
ROTATE	Existing
TRANSFER	Existing

Description: Synergen Default Code

This rule is used to associate whether work done on a compatible unit is categorized as a new, retire or existing construction asset depending on the function.

Enter a function and type to categorize a compatible unit with that function as new, retire, or existing for the CU Summary view in Work Design.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Copy to New Compatible Unit

Allows the user to create an exact copy of an existing Compatible Unit record.

Show CU Location

Allows users to access the CU Location and Location Worksheet views on Work Order Tasks. Users must also have the SHOW CU ON WO responsibility. When this function is not present the compatible units location views do not display in the Work Order module.

Show CU on Work Order

Grants access to compatible units views on Work Order records. Note that this is the function that controls whether compatible units is turned “on” or “off.” When this function is not present the compatible units views do not display in the Work Order module.

Replace CU Material Item

Grants access to the action in the Compatible Units module that makes global updates to compatible units material items. For example, if item1 needs to be replaced by item2, the action finds all compatible unit and Work records that reference item 1 and replaces it with item 2.

Update Active CU/CS

Allows users to update active compatible units or compatible structures.

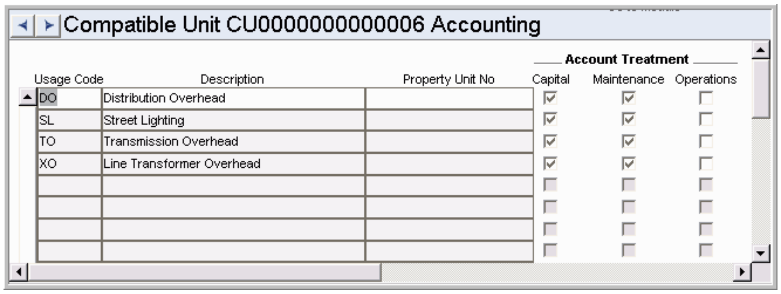
Reports

S_RPT151 - Compatible Units Audit Report

Lists compatible units and their stock code, function, equipment, labor and account attributes.

Views

Accounting



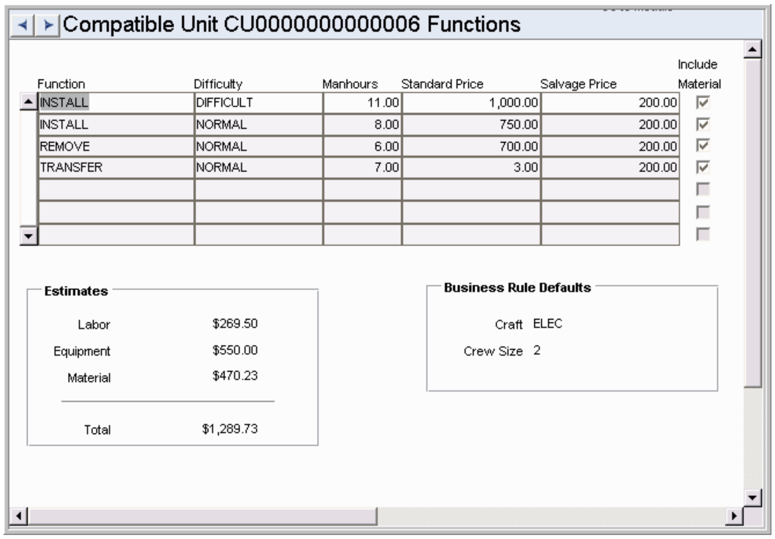
Compatible Unit CU0000000000006 Accounting

			Account Treatment		
Usage Code	Description	Property Unit No	Capital	Maintenance	Operations
DO	Distribution Overhead		☑	☑	☐
SL	Street Lighting		☑	☑	☐
TO	Transmission Overhead		☑	☑	☐
XO	Line Transformer Overhead		☑	☑	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐

The Accounting view provides a way of associating compatible units with Usage Codes and other indicators for accounting purposes.

Usage codes are defined in the Regulatory Account Usage Codes Business Rule.

Functions



Compatible Unit CU0000000000006 Functions

Function	Difficulty	Manhours	Standard Price	Salvage Price	Include Material
INSTALL	DIFFICULT	11.00	1,000.00	200.00	☑
INSTALL	NORMAL	8.00	750.00	200.00	☑
REMOVE	NORMAL	6.00	700.00	200.00	☑
TRANSFER	NORMAL	7.00	3.00	200.00	☑
					☐
					☐
					☐

Estimates

Labor	$269.50
Equipment	$550.00
Material	$470.23
Total	$1,289.73

Business Rule Defaults

Craft ELEC
Crew Size 2

The Functions view contains descriptions of planned activities defined for the compatible unit and an estimate of the costs involved.

Header (Master Catalog module)

Any stock item that will be added to compatible units materials lists must be configured to work as a CU material item.

Stock Type - The item should be an Inventory type stock item.

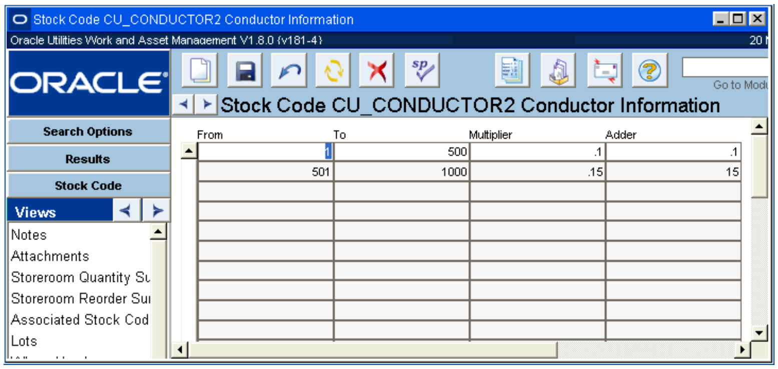
Status - The item must be in Active status to be used as a compatible unit material.

Reconcile to CU - Check this box if the item should be tracked for Work Order Task CU Reconciliation. If the box is checked and more or less of the planned quantity is used for work, the item must be reconciled.

When a CU is reconciled on the Work Order Task, the Regulatory Account Costs are deleted from the CU Reconciliation view and the costs are redistributed to the new Regulatory Account splits created from the reconciliation process the next time sdbp_regulatory_account_cost or run all batch is run. These splits are shown in the Regulatory Accounting view on the Work Order Task.

Conductor Information view (Master Catalog module)

The conductor information view is used to define a stock item as a conductor for use with compatible units.


Stock Code CU_CONDUCTOR2 Conductor Information
Oracle Utilities Work and Asset Management V1.8.0 (v181-4)
ORACLE
Go to Modu
Stock Code CU_CONDUCTOR2 Conductor Information
Search Options
Results
Stock Code
Views
Notes
Attachments
Storeroom Quantity Su
Storeroom Reorder Su
Associated Stock Cod
Lots

From	To	Multiplier	Adder
1	500	.1	.1
501	1000	.15	15

The information entered in this screen defines the parameters for determining additional conductor length for slack based on the distance between two attachment points. The CU quantity and items quantity is automatically calculated for the stock item using the distance entered on work documents (Work Designs and Work Order CU Location) and the information entered here. Please note that slack is not factored into the calculation if the Underground check box is checked when the item is added to the CU Location (Detail) view on the work record.

From and To represent the starting and ending point values of the stock code length to apply the calculation to based on the “Distance” defined on the work document. The Multiplier and Adder represent a number to be multiplied and added to the stock code length that falls on or between the From and To values.

Please refer to the User Guide topic, Compatible Units for Conductors, for more information.

Bill of Materials Module

The system allows for the creation of maintenance Bills of Materials in support of Material and Service Requirements functionality on work orders and benchmark work orders. The Bill of Material module enables the user(s) to maintain a listing of commonly used parts needed for asset maintenance.

Fields

Sequence No.: BOM ID

The record number is comprised of a unique ID (Ex. "RLW_BOM001"). Bill of Material record numbers are typically set to be created manually.

> **TABLE NAME** - SA_BOM_DATA - The sequence number is generated for this database table.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Breakdown Indicator

When you initially open the record, the Bill of Materials list shown is for the top level of the list. The Breakdown For field indicates this by showing the same number as shown in the BOM ID field at the top of the window. However, each of these parts may have a lower sub-list of parts. For example an engine can consist of valves, pistons, etc. all with parts lists of their own. You can access the sub-lists (if any) by clicking the V buttons at the start of each line in the list. Return to the top level by clicking the TOP Level button. If a further breakdown exists for a BOM item, the V button will appear bold.

Caution: The system will not prevent you from listing a part on its own sub-list. In other words, the same part can be used on both the parent and child levels. Doing so, however, is illogical and will cause the system to behave erratically when you attempt to display the sub-level breakdown.

Code Tables

Code Table 29: Asset Types

Asset Type field - Classify assets into defined groups. Classifying assets in this manner facilitates searches by allowing queries to be conducted at a high level. The Results of Search completed at the Asset Type level will contain valuable information that can used to further narrow down user searches until the required Asset record is located. This code table is configured under the following modules: Procedure, Asset, BOM.

Copy Record

BOMDATA - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Update BOM

Grants access to an action that allows users to delete or replace a stock item from all Bill of Materials records that currently list the stock item.

Batch Processes

Create BOM Details - sdbp_create_bom_details.create_bom_details;

Provides an automated means of updating existing bill of materials with new stock codes based on other operations occurring in the system. Stock Code is added to the BOM ID related to Asset ID/Component ID information selected from SA_INVENTORY_LOG and SA_RECEIVING_LOG tables. Once a log record is successfully processed, it is marked as complete.

Reports

S_RPT081 - Bill of Material Report

Lists Bill of Material information created in the Bill of Material module of the Resource subsystem.

Change Request Module

Fields

Sequence No.: Change Request No.

The record number is comprised of a unique ID (Ex. “0200015”). Change Request record numbers are typically set to be system generated.

TABLE NAME - SA_CHANGE_REQUEST - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Next Approver Field

Designate approvers for Change Requests in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Code Tables

Code Table 136: Create New Asset Transaction Types

Transaction Type field on Asset Change (New) view - Classify and group change requests.

Code Table 141: Change Asset Information Transaction Types

Transaction Type field on Asset Change (Change) view - Classify and group change requests.

Code Table 162: Dispose of Asset Transaction Types

Transaction Type field on Asset Change (Dispose) view - Classify and group change requests.

Code Table 163: Change Asset Configuration Transaction Types

Transaction Type field on Asset Change (Configure) view - Classify and group change requests.

Code Table 165: Change Request Types

Type field - Use type codes to classify and group Change Requests.

Code Table 166: Change Request Classes

Class field - Use class codes to further categorize and group Change Requests.

Code Table 167: Impact Types

Impact field - Impact codes can be defined in any way that fits your business practices. Two possible examples are by the relative impact (high, moderate, low, etc.), or the type of impact (process shut down, plant shut down, etc.).

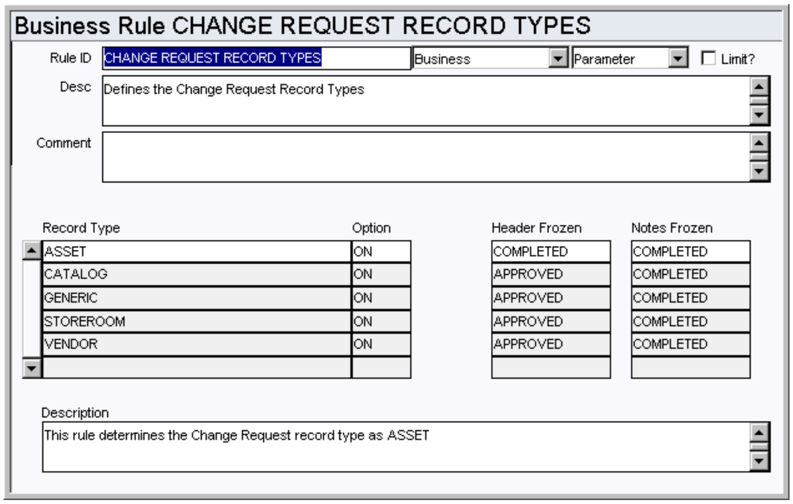
Code Table 168: Justification Types

Justification field - Justification codes can be defined in any way that fits your business practices. A typical example would be a code indicating the reason the change is required (i.e.OSHA regulations).

These fields contain a general code, but users can enter a more detailed impact or justification for the change in the text field to the right of the fields in the module.

Business Rules

Change Request Record Types Rule



Business Rule CHANGE REQUEST RECORD TYPES

Rule ID: CHANGE REQUEST RECORD TYPES | Business | Parameter | ☐ Limit?

Desc: Defines the Change Request Record Types

Comment:

Record Type	Option	Header Frozen	Notes Frozen
ASSET	ON	COMPLETED	COMPLETED
CATALOG	ON	APPROVED	COMPLETED
GENERIC	ON	APPROVED	COMPLETED
STOREROOM	ON	APPROVED	COMPLETED
VENDOR	ON	APPROVED	COMPLETED

Description: This rule determines the Change Request record type as ASSET

Define which record types are managed in the Change Request module, and when modifications on these records are “frozen.”

Record Type and Option

ASSET - When value is ON, you can create Change Requests for Asset records. When value is OFF, you can not create this type of Change Request.

CATALOG - When value is ON, you can create Change Requests for Master Catalog records. When value is OFF, you can not create this type of Change Request. Default is OFF.

GENERIC - When value is ON, you can create Generic Change Requests . When value is OFF, you can not create this type of Change Request.

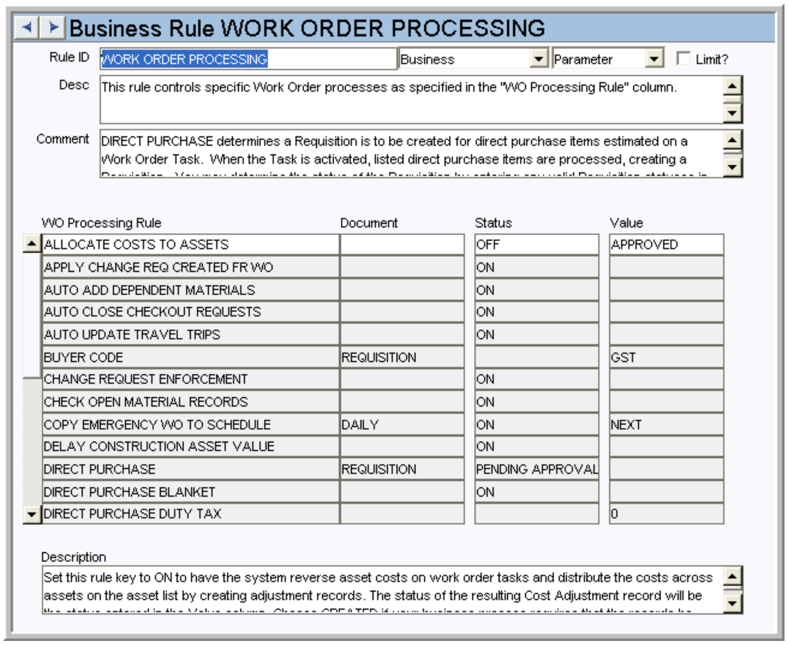
STOREROOM - When value is ON, you can create Change Requests for Storeroom records. When value is OFF, you can not create this type of Change Request. Default is OFF.

VENDOR - When value is ON, you can create Change Requests for Vendor records. When value is OFF, you can not create this type of Change Request.

Header Frozen, Note Frozen

For each record type, select the record status that the record is in when changes can no longer be made to the header or notes.

Work Order Processing Rule



Rule ID: WORK ORDER PROCESSING | Business | Parameter | ☐ Limit?

Desc: This rule controls specific Work Order processes as specified in the "WO Processing Rule" column.

Comment: DIRECT PURCHASE determines a Requisition is to be created for direct purchase items estimated on a Work Order Task. When the Task is activated, listed direct purchase items are processed, creating a

WO Processing Rule	Document	Status	Value
ALLOCATE COSTS TO ASSETS		OFF	APPROVED
APPLY CHANGE REQ CREATED FR WO		ON	
AUTO ADD DEPENDENT MATERIALS		ON	
AUTO CLOSE CHECKOUT REQUESTS		ON	
AUTO UPDATE TRAVEL TRIPS		ON	
BUYER CODE	REQUISITION		GST
CHANGE REQUEST ENFORCEMENT		ON	
CHECK OPEN MATERIAL RECORDS		ON	
COPY EMERGENCY WO TO SCHEDULE	DAILY	ON	NEXT
DELAY CONSTRUCTION ASSET VALUE		ON	
DIRECT PURCHASE	REQUISITION	PENDING APPROVAL	
DIRECT PURCHASE BLANKET		ON	
DIRECT PURCHASE DUTY TAX			0

Description: Set this rule key to ON to have the system reverse asset costs on work order tasks and distribute the costs across assets on the asset list by creating adjustment records. The status of the resulting Cost Adjustment record will be

Controls the work order processes specified in the WO Processing Rule column.

WO Processing Rule, Document, Status and Value

APPLY CHANGE REQ CREATED FR WO - This rule key determines whether change requests for construction assets will be applied automatically when created from work orders. If the rule key status is set to ON, the system creates Change Request records based on entries made to the Construction Asset view on the Task and sets those Change Requests to 'Complete' status. The requested changes are automatically posted to the assets. If the rule key status is set to OFF the Change Requests are created and set to 'Created' status so that they must be reviewed before any change is made to the assets. Whether the rule key setting is YES or NO, the 'sdbp_create_change_req.create_chaange_from_wo' batch process is triggered once the Task status is set to 'Finished' and the Work Order status is set to 'Closed'.

DELAY CONSTRUCTION ASSET VALUE - This rule key determines when construction assets are valued for depreciation. If it is set to OFF then Construction Assets are valued the first time sdbp_work_order.fixed_asset is run after the Work Order is set to Closed status. If it is set to ON then construction assets are not valued until after sdbp_year_end_oh_cost_dist (Indirect Overhead) is run based on the schedule established by the INDIRECT OVERHEAD ALLOCATIONS rule key of the Regulatory Account Options business rule.

Copy Record

CHNGREQ - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Change Request Actions for AVL

Grants the ability to access and use the Actions for Vendor type Change Requests.

Change Request Asset

Grants the ability to apply the approved changes from an Asset type change request.

Change Request Catalog/Storeroom

Grants access to items on the Actions lists for Catalog and Storeroom type Change Requests.

Reports

S_RPT114 - Change Request Report

Lists the Assets, Components, Analysis, Notes, Work Requests, Work Orders, Tasks, ant attachments pertaining to Change Requests.

Employee Module

Fields

Sequence No.: Employee No.

The record number is comprised of a unique ID (Ex. "0003"). Employee record numbers are typically set to be system generated.

TABLE NAME - SA_EMPLOYEE - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Department and Area

Use these fields to assign an employee to a specific Department and Area within your organization. These fields are controlled by the Department and Area modules.

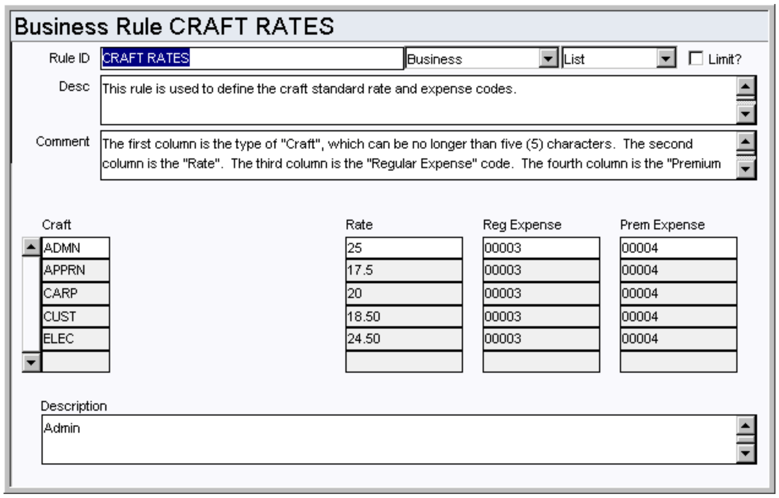
Auto-Timesheet Schedule Fields

Complete the fields in the Auto-Timesheet Schedule View to set-up automatic timesheet creation for users. If an employee routinely works a fixed schedule and charges time against the same charge numbers, the system can be configured to automatically create timesheets for that employee.

When the relevant information is entered on the Auto Timesheet Schedule view and the Automatically Create Timesheet box is checked, batch processing creates timesheets for each workday within the pay period and alerts the employee when the timesheet for the pay period is created.

Business Rules

Craft Rates Rule



Business Rule CRAFT RATES

Rule ID: CRAFT RATES | Business | List | ☐ Limit?

Desc: This rule is used to define the craft standard rate and expense codes.

Comment: The first column is the type of "Craft", which can be no longer than five (5) characters. The second column is the "Rate". The third column is the "Regular Expense" code. The fourth column is the "Premium

Craft	Rate	Reg Expense	Prem Expense
ADMN	25	00003	00004
APPRN	17.5	00003	00004
CARP	20	00003	00004
CUST	18.50	00003	00004
ELEC	24.50	00003	00004

Description: Admin

Define Craft codes along with associated wage rates and expense codes.

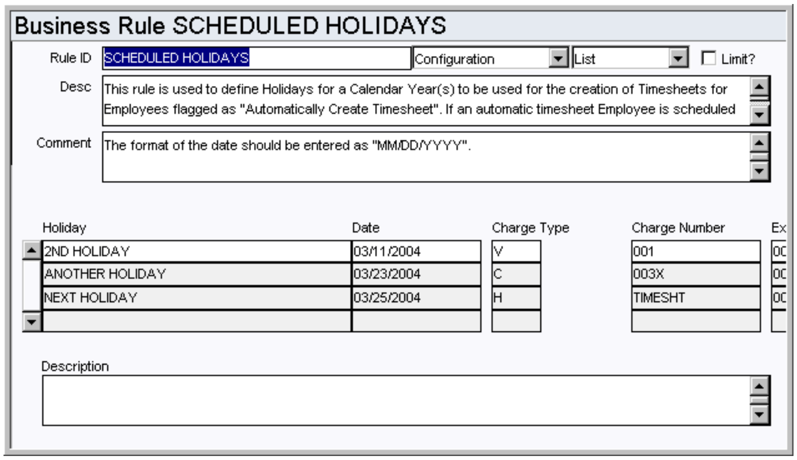
Craft
Classify job types in the Craft field. Examples are ENG for engineer or MECH for mechanic.

Rate
This parameter sets the wage rate for the Craft listed.

Reg Expense
This parameter sets the expense code that the system will charge the employee’s regular (i.e. non-premium) labor charges to.

Prem Expense
This parameter sets the expense code that the system will charge the employee’s premium (i.e. Overtime) labor charges to.

Scheduled Holidays



Business Rule SCHEDULED HOLIDAYS

Rule ID: SCHEDULED HOLIDAYS | Configuration | List | ☐ Limit?

Desc: This rule is used to define Holidays for a Calendar Year(s) to be used for the creation of Timesheets for Employees flagged as "Automatically Create Timesheet". If an automatic timesheet Employee is scheduled

Comment: The format of the date should be entered as "MM/DD/YYYY".

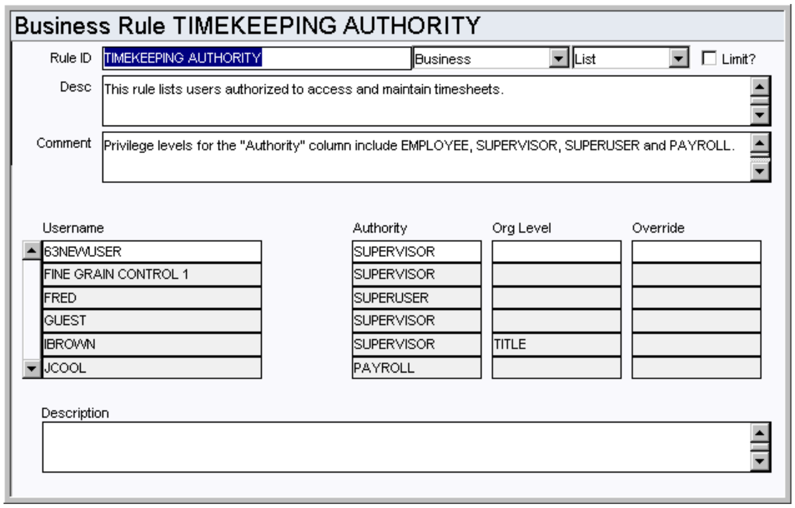
Holiday	Date	Charge Type	Charge Number	Ex
2ND HOLIDAY	03/11/2004	V	001	0C
ANOTHER HOLIDAY	03/23/2004	C	003X	0C
NEXT HOLIDAY	03/25/2004	H	TIMESHT	0C

Description:

The Scheduled Holidays rule defines holidays the system uses when creating timesheets for employees flagged for automatic timesheet creation.

If an employee is scheduled to work on the same day as a scheduled holiday, the Timesheet line item will be created using the Charge Type, Account and Regular Expense Code defined for the holiday. Shift and Differential information will come from the appropriate Employee record.

Timekeeping Authority Rule



Business Rule TIMEKEEPING AUTHORITY

Rule ID: TIMEKEEPING AUTHORITY | Business | List | ☐ Limit?

Desc: This rule lists users authorized to access and maintain timesheets.

Comment: Privilege levels for the "Authority" column include EMPLOYEE, SUPERVISOR, SUPERUSER and PAYROLL.

Username	Authority	Org Level	Override
63NEWUSER	SUPERVISOR		
FINE GRAIN CONTROL 1	SUPERVISOR		
FRED	SUPERUSER		
GUEST	SUPERVISOR		
IBROWN	SUPERVISOR	TITLE	
JCOOL	PAYROLL		

Description:

Lists users authorized to access and maintain timesheets, leave requests, and employee records. This rule only controls who has access to the records, approval authorization is controlled in the Approval Limits module.

Username

Enter Usernames or DEFAULT in this field. If you list individual usernames, only those users listed will have access to the timesheets controlled by the corresponding privilege level in the AUTHORITY column. If you use DEFAULT, all users will have the timesheet privilege listed in the corresponding AUTHORITY column. For example: By setting the USERNAME column to DEFAULT and the AUTHORITY column to SUPERVISOR, all users will be granted SUPERVISOR privilege without having to identify them explicitly.

Authority

The Authority column defines the scope of a users' authority. The authority levels include: Employee, Supervisor, Superuser and Payroll.

EMPLOYEE - User can only view or modify their own timesheet. Org Level does not apply.

SUPERVISOR - User can view or modify their own timesheet and timesheets of members of the Org Level entered. The default Org Level is CREW but can be changed.

SUPERUSER - User can view or modify any timesheet. The default Org Level is <BLANK> for all levels but can be changed.

PAYROLL - User can view or modify any timesheet, as well as override or adjust Compensatory Time Accrual calculations. Org Level does not apply.

Org Level

Used to widen or narrow the scope of the users' authority. Valid values are Crew, Department, Area and <Blank>.

CREW - User is limited to those timesheets belonging to his or her CREW. This is the default setting for SUPERVISOR.

AREA - User is limited to those timesheets belonging to his or her Area.

DEPARTMENT - User is limited to those timesheets belonging to his or her Department.

<BLANK> - User has authority to all levels.

Override
You can use this field to temporarily override the authority for a rule key.

Batch Processes

Auto Create Timesheets - sdbp_auto_create_timesheet.main;

Triggers functionality where the system automatically creates timesheet records for employees as designated on their Employee record. The system can be configured to automatically create timesheets for employees who work a fixed schedule by checking the Automatically Create Timesheet? Indicator in the Auto Timesheet Schedule view in the Employee module.

Code Tables

Code Table 45: Training Courses (Training View)

Course field - Define course codes. The Course Code can be up to 20 characters long, and the Description field can be used for longer descriptions.

This is a non-validating code table. If there are additional courses to be added, they can be typed into the Course field and the system saves them to the SA_Employee_Training folder, but does not write the value back to Code Table 45. This is why you can have more choices available in the List of Values than shows on the Code Table 45 record.

Code Table 46: Payroll Group

Pay Group field - Categorize employees by how they are paid. Entries might include Part Time, Full Time, Hourly, Salaried, etc.

Code Table 48: Leave Reason Codes (Scheduled Leave View)

Reason column - Define leave reason codes. Examples might include Maternity, Sick, Vacation, etc.

Code Table 98: Administrative Department

Admin Dept. field - Define employee's assigned departments. Some examples may be 'ENG', 'HR', 'FIN', etc. Classifying employees to their respective departments serves as a useful means of searching for employees where the department is known.

Code Table 99: Classification

Classification field - Classify employees. Typical examples may include classifications based on union contracts, management structure, etc.

Code Table 111: Overtime Crew (Overtime Standings View)

Crew field - Determine in what crew a particular employee is available for overtime work. This information can be used on the search options screen to help in finding employees.

Code Table 112: Overtime Zone (Overtime Standings View)

Zone field - Determine in what Zone a particular employee is available in for overtime work. This information can be used on the search options screen to help in finding employees available for Overtime work in a particular zone.

Code Table 208: Employee Job Title

Job Title field - Define employee job titles. The 'Code' column has a maximum data length of 6 characters. The 'Code Desc' column can be used for a longer description.

Code Table 310: Supervisor Title

Supervisor field - Define supervisory positions. These codes do not identify individuals. Some examples include Plant Superintendent, Electrical-Shift 1 Supervisor, or Foreman.

Copy Record

EMPLOYEE - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Employee SSN

Grants access to the employee Social Security Number displayed in the Employee module.

Employee Wage Rate

Grants access to the employee Wage Rate information displayed in the Employee module.

Reports

S_RPT012 - Employee Report

Lists Employee information created in the Employee module of the Resource subsystem.

S_RPT078 - Holiday Overtime Standing Report

Provides a listing of Employees for holiday call-in overtime.

S_RPT061 - Wage Rate History Report

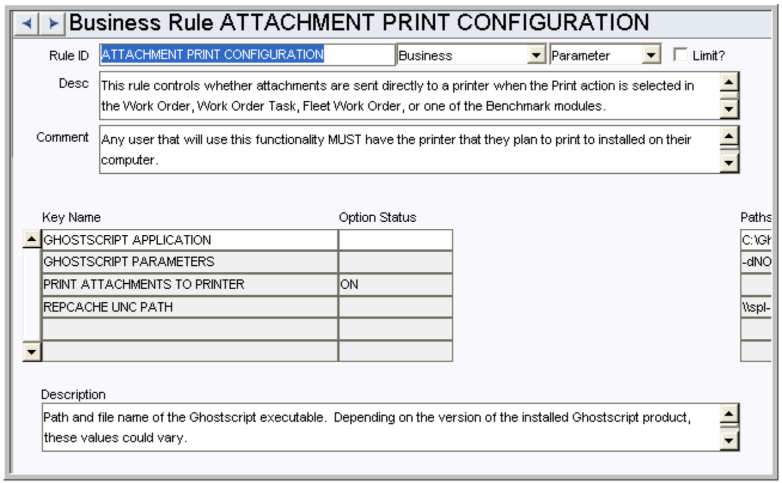
Lists Employee Wage Rate information from the Wage Rate History detail in the Employee module of the Resource subsystem.

Attachments Modules

There are seven Attachments modules in the system: Document Control, Procedure, Specification, Specification Template, Standard Notes, MSDS, and Chemical Label.

Business Rules

Attachment Print Configuration Rule



Rule ID: ATTACHMENT PRINT CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule controls whether attachments are sent directly to a printer when the Print action is selected in the Work Order, Work Order Task, Fleet Work Order, or one of the Benchmark modules.

Comment: Any user that will use this functionality MUST have the printer that they plan to print to installed on their computer.

Key Name	Option Status	Paths
GHOSTSCRIPT APPLICATION		C:\Gh
GHOSTSCRIPT PARAMETERS		-dNO
PRINT ATTACHMENTS TO PRINTER	ON	
REPCACHE UNC PATH		\\spl-

Description: Path and file name of the Ghostscript executable. Depending on the version of the installed Ghostscript product, these values could vary.

This rule controls whether attachments are sent directly to a printer when the Print action is selected in the Work Order, Work Order Task, Fleet Work Order, or one of the Benchmark modules.

Any user that will use this functionality MUST have the printer that they plan to print to installed on their computer.

PRINT ATTACHMENTS TO PRINTER - Set this value to ON to send Work Order attachments directly to the printer when the Print action is selected in a module. The default is set to OFF. You must also make sure that the REPORTS ALWAYS PREVIEW rule key in the Web Configuration business rule is set to OFF. This value is also available in the User Profile. the value setting in the User Profile will override the business rule setting.

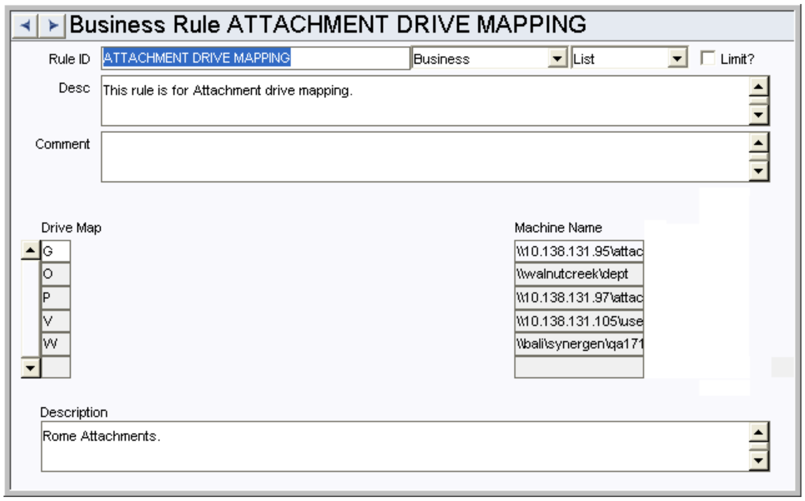
The attachment must be in .pdf format and a third-party application called Ghostscript must be installed on the application server and must be configured properly.

REPCACHE UNC PATH - This is the output directory path for reports on the application server. This path must be in UNC format only: \\<SERVER_NAME>\REPCACHE\ . Example: \\paris\repcache\

GHOSTSCRIPT APPLICATION - Path and file name of the Ghostscript executable. Depending on the version of the installed Ghostscript product, these values could vary. Example: C:\gs\gs.exe

GHOSTSCRIPT PARAMETERS - These parameters are used by the Ghostscript program to disable interactive prompting. There is also another parameter, -sDEVICE, which is appended to this string by the application. This parameter is populated by the GS Device rule key in the PRINTER ALIAS Business Rule. Example: -dNOPAUSE -dBATCH

Attachment Drive Mapping Rule



Business Rule ATTACHMENT DRIVE MAPPING

Rule ID: ATTACHMENT DRIVE MAPPING | Business | List | ☐ Limit?

Desc: This rule is for Attachment drive mapping.

Comment:

Drive Map	Machine Name
G	\\10.138.131.95\attac
O	\\walnutcreek\dept
P	\\10.138.131.97\attac
V	\\10.138.131.105\use
W	\\bali\synergen\qa171

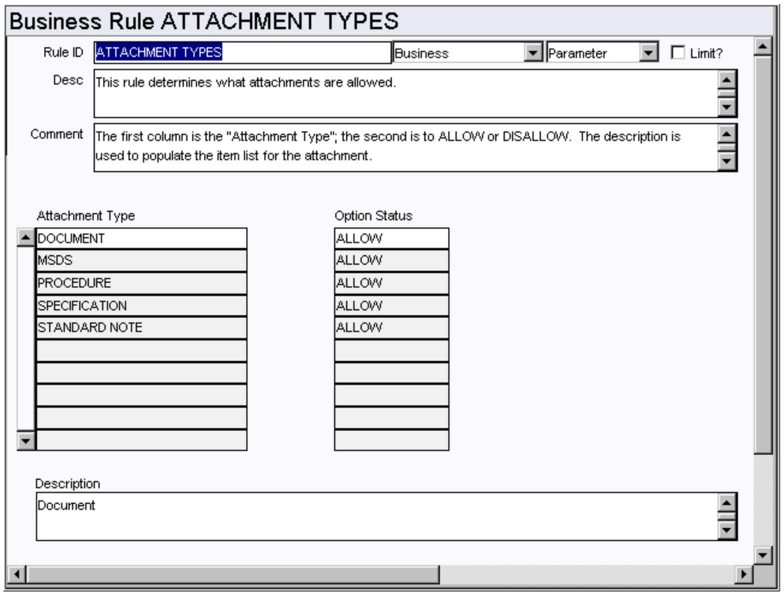
Description: Rome Attachments.

Use this rule to map drives where attachment files are stored.

Enter a drive and the machine the drive should be mapped to in the appropriate columns. Attachments stored on these drives and attached to applicable records will be converted to the UNC path when printed.

For Blanket Contracts and Purchase Order records this setting affects e-mails with attachments sent from the record where the E-Mail Purchase Order action is selected and the Print indicator is checked.

Attachment Types Rule



Business Rule ATTACHMENT TYPES

Rule ID: ATTACHMENT TYPES | Business | Parameter | ☐ Limit?

Desc: This rule determines what attachments are allowed.

Comment: The first column is the "Attachment Type"; the second is to ALLOW or DISALLOW. The description is used to populate the item list for the attachment.

Attachment Type	Option Status
DOCUMENT	ALLOW
MSDS	ALLOW
PROCEDURE	ALLOW
SPECIFICATION	ALLOW
STANDARD NOTE	ALLOW

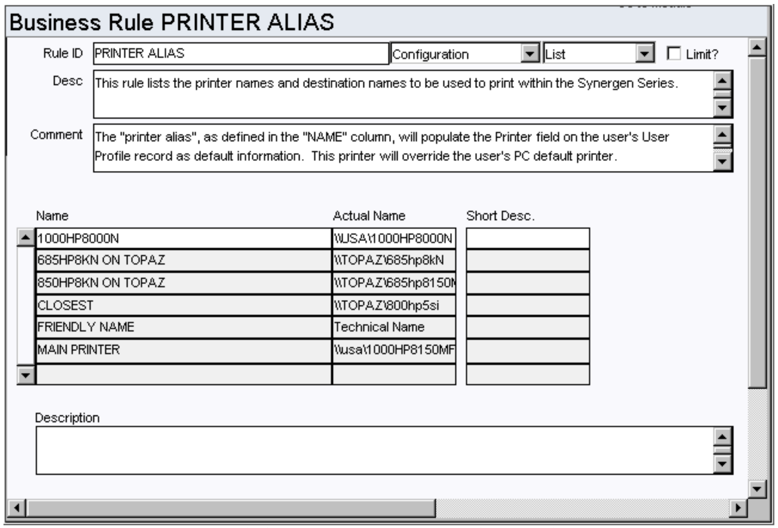
Description: Document

Determine which attachment types are made available as Attachments throughout the application (such as in the Asset, Storeroom, Catalog, Work Order and Process modules).

Attachment Type and Option Status

Standard attachment types include Document, MSDS, Chemical Label, Procedure, Specification, and Standard Notes. Set the Option Status field to ALLOW or DISALLOW to enable or disable the attachment. You can also add additional attachment types if needed.

Printer Alias Rule



Business Rule PRINTER ALIAS

Rule ID: PRINTER ALIAS | Configuration | List | ☐ Limit?

Desc: This rule lists the printer names and destination names to be used to print within the Synergen Series.

Comment: The "printer alias", as defined in the "NAME" column, will populate the Printer field on the user's User Profile record as default information. This printer will override the user's PC default printer.

Name	Actual Name	Short Desc.
1000HP8000N	\\USA\1000HP8000N	
685HP8KN ON TOPAZ	\\TOPAZ\685hp8kN	
850HP8KN ON TOPAZ	\\TOPAZ\685hp8150	
CLOSEST	\\TOPAZ\800hp5si	
FRIENDLY NAME	Technical Name	
MAIN PRINTER	\\usa\1000HP8150MF	

Description:

Indicate the printer names and destination names to be used to print within the system. The printer alias , as defined in the NAME column, will populate the Printer field on the user's User Profile record as default information. This printer will override the user's PC default printer.

NAME - The name field establishes an "alias," or user-friendly name for the printer indicated in the Actual Name column. This value will populate the Printer field on the User Profile record as the default (up to 30 characters).

ACTUAL NAME - Enter into the "ACTUAL NAME" column the printer name that a specific operating system would recognize (up to 30 characters).

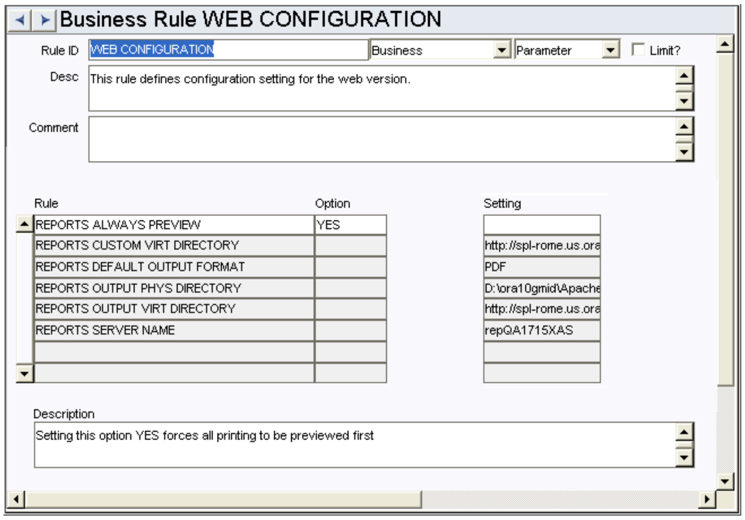
If you have many different operating systems (i.e. Windows95, WindowsNT, etc.) printing to one printer, the printer name is stored in the "ACTUAL NAME" column. This printer name can be found in the Control Panel for the operating system under Printers.

You must enter the printer name in the following format: \\<server name>\<actual printer name> (e.g. \\MYSERVER\685HP8KN if "685HP8KN" is the actual printer name), OTHERWISE THE PRINTER WILL NOT BE RECOGNIZED. If the printer name changes, you only need to change the Business Rule setting, not all of the User Profile records.

SHORT DESC. - Enter into the "SHORT DESC." column a description of the printer (up to 30 characters).

GS DEVICE - If the PRINT ATTACHMENTS TO PRINTER rule key in the ATTACHMENT PRINT CONFIGURATION Business Rule is set to ON, enter into the "GS Device" column the Ghostscript device name that applies to the printer. An example of this would be "LASERJET" for an HP LaserJet printer. The printer entered must be the correct name and it must be supported by the installed version of Ghostscript. To find a valid list of printer device names, please refer to your Ghostscript documentation.

Web Configuration Rule



Business Rule WEB CONFIGURATION

Rule ID: WEB CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule defines configuration setting for the web version.

Comment:

Rule	Option	Setting
REPORTS ALWAYS PREVIEW	YES	
REPORTS CUSTOM VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS DEFAULT OUTPUT FORMAT		PDF
REPORTS OUTPUT PHYS DIRECTORY		D:\ora10gmid\Apache
REPORTS OUTPUT VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS SERVER NAME		repQA1715XAS

Description: Setting this option YES forces all printing to be previewed first

Define web configuration settings.

Rule, Option, and Setting

Enter YES or NO in the Option column for each of the rule keys. Also enter the file path or format (as appropriate) in the Setting column.

REPORTS ALWAYS PREVIEW - Setting this option YES forces all printing to be previewed first.

REPORTS BARCODE FONT - Enter a value in the setting field to specify the font to be used on reports that include a barcode field. The font that is entered should be available in your system fonts. You can find fonts by searching the internet for “Free Barcode Fonts.”

REPORTS CUSTOM VIRT DIRECTORY - This is the web server virtual directory to run the Oracle Reports CGI program for the web version.

REPORTS DEFAULT OUTPUT FORMAT - Default Report Output File Format.

REPORTS OUTPUT PHYS DIRECTORY - This is the web server physical directory to put report output for the web version.

To enable e-mailing of Purchase Orders to Vendors, allow network access to the directory defined under this rule key. Once this access is allowed, identify this network share in the E-Mail Configuration Business Rule under the key PO EMAIL FILE LOCATION.

REPORTS OUTPUT VIRT DIRECTORY - This is the web server virtual directory to retrieve report output for the web version.

REPORTS SERVER NAME - This is the name of the reports server for the web version.

UPLOAD DIRECTORY - This is the directory where files are stored when they are uploaded to support receiving multiple trackable stock items.

Printing PDF Attachments

This document describes how to configure Oracle Utilities Work and Asset Management to send PDF attachments directly to printer, rather than having them display on the screen, when a record is printed with attachments.

Checklist

The printing attachments functionality requires the following components:

1. Oracle Utilities Work and Asset Management V1.7.15 or greater
2. Ghostscript (a freeware program – AFPL Ghostscript is recommended)

Installation

Obtain Ghostscript

A freeware version of AFPL Ghostscript is available on the Internet at several locations. One location where you can find Ghostscript is: http://pages.cs.wisc.edu/~ghost/doc/AFPL/index.htm For a Windows based server, it is recommended that you download the ".exe (32-bit Windows)" version. For Ghostscript version 8.54, the file is named gs854w32.exe.

NOTE: This functionality was tested using Ghostscript version 8.54. Earlier versions may yield unexpected results.

Install Ghostscript

It is recommended that you install Ghostscript in a directory that does NOT have spaces in the path name. If the on-screen installation instructions prompt that you install in C:\Program Files, it is recommended that you choose another directory with no spaces in the path name. To install, launch the installation executable program and follow the installation instructions.

Business Rule Settings for Ghostscript

Four business rules need to be set in the Oracle Utilities Work and Asset Management application in order for the Ghostscript integration to work correctly.

Attachment Print Configuration Rule

Examples of Key settings

Key Name	Status	Paths/Params	Notes
GHOSTSCRIPT APPLICATION		C:\GS\gs8.54\bin\gswin32c.exe	This is an example. Enter the exact path/and file name for your Ghostscript executable.
GHOSTSCRIPT PARAMETERS		-dNOPAUSE -dBATCH	Do NOT alter these parameters unless you are familiar with Ghostscript.
PRINT ATTACHMENTS TO PRINTER	ON		This value needs to be set to ON in order to enable this functionality.
REPCACHE UNC PATH		\\<server>\repcache\	This is the output directory path for reports on the application server. This path must be in UNC format only.

Attachment Drive Mapping Rule

This business rule is used to map network drive letters to UNC paths. Enter a drive letter and the UNC path of the server\directory that it should be mapped to, in the appropriate columns.

Printer Alias Rule

This business rule that has a new column titled "GS Device" (Ghostscript Device).

Examples of Key settings:

Name	Actual Name	Short Desc.	GS Device
COPY ROOM PRINTER	\\MYSERVER\G3242P		laserjet
FLOOR 2 PRINTER	\\MYSERVER\G3146MFP		pxlmono

The GS device name you enter must be correct for your printer and must be supported by the installed version of Ghostscript.

To find the correct GS device for your printer, see the Printers section of the following website: http://www.gnu.org/software/ghostscript/devices.html Another website containing GS device names for a large number of printers is: http://openprinting.org/printer_list.cgi

Find a list of Ghostscript devices supported by the installed version of Ghostscript:

1. **Open a command prompt.**
2. **Navigate to the "bin" directory where Ghostscript was installed, example: C:\Ghostscript854\gs8.54\bin.**
3. **Launch the executable with "–h" after it, example: gswin32c –h**

   This returns a variety of information, including a list of available devices. The device you enter in the Printer Alias business rule must be on this list. There may also be documentation included with your installed version of the Ghostscript application.

   NOTE: Some generic settings you can try for HP or Epson printers (and they may work for other laser printers as well) are:

   HP Laserjet - "laserjet"

   Epson black and white printers - "pxlmono"

Web Configuration Rule

The Web Configuration Business Rule has a setting called REPORTS ALWAYS PREVIEW. When REPORTS ALWAYS PREVIEW is set to YES, reports and attachments will be displayed in a window on the client PC. If it is set to NO and the report is defaulted with a Destination of Printer (in Report Administration), then the report and its PDF attachment(s) will print directly to the printer.

IMPORTANT: This setting is also available as an option in the User Profile module. If a REPORTS ALWAYS PREVIEW value is set in the User Profile, that value will override the value set in the Business Rule.

Troubleshooting

Error Messages

Below is a list of the more common error messages that may appear when printing attachments, together with the possible cause and suggested corrective action.

- Getting Repcache path from ATTACHMENT PRINT CONFIGURATION > REPCACHE UNC PATH B.R. key

  Cause: The ATTACHMENT PRINT CONFIGURATION > REPCACHE UNC PATH rule key may be missing.

  Action: Verify that this value exists and add the value if missing.

- Verify the following file exists: <path\filename.ps>

Cause 1: The ATTACHMENT PRINT CONFIGURATION > REPCACHE UNC PATH rule key is incorrect or misspelled.

Action 1: Verify that this value is correct and is not misspelled. Correct as needed.

Cause 2: In the ATTACHMENT PRINT CONFIGURATION rule, the printer the user is attempting to print to may contain a misspelled GS Device value. Also, the device may not be supported by the version of Ghostscript installed on the application server. Please refer to the "Ghostscript Devices" section in this guide for instructions on obtaining a list of supported printers.

Action 2: Verify that this value is valid and is not misspelled. Correct as needed.

- Verifying the following file is greater than 0 bytes: <path\filename.ps>

  Cause 1: The user may not have access/security privileges to the Repcache directory.

  Action 1: Verify that the user has access/security privileges to the Repcache directory. On the user's PC, open Windows File Explorer and try to access the Repcache directory by entering the path in the Address Bar. If a logon screen appears, the user should logon to the server and try printing attachments again.

  Cause 2: The user may not have access/security privileges to the network directory where the PDF attachment is located.

  Action 2: Verify that the user has access/security privileges to the network directory where the PDF attachment is located. On the user's PC, open Windows File Explorer and try to access the network directory where the attachment is located by entering the path in the Address Bar. If a logon screen appears, the user should logon to the server and try printing attachments again.

  Cause 3: The network drive may not be mapped on the application server.

  Action 3: On the application server, the network drive may not be mapped to the server. Also, see the "Limitations" section regarding attachments on a network drive.

  Cause 4: The drive letter in the ATTACHMENT DRIVE MAPPING Rule may have an invalid Machine Name value.

  Action 4: Verify that this value is correct and is not misspelled. Correct as needed.

- Mapping network drive letter to machine name - Unable to locate drive mapping in ATTACHMENT DRIVE MAPPING B.R.

  Cause: In the ATTACHMENT DRIVE MAPPING Rule, the mapped drive, for which the attachment is located, may not have a Machine Name value or the rule key for the relevant mapped drive may not exist.

  Action: Verify that the drive mapping exists in the Rule and that the Machine Name value isn't missing.

- Getting Ghostscript application path and executable from ATTACHMENT PRINT CONFIGURATION -> GHOSTSCRIPT APPLICATION B.R. key

Cause: The ATTACHMENT PRINT CONFIGURATION > GHOSTSCRIPT APPLICATION rule key may be missing.

Action: Verify that this value exists and add the value if missing.

- Verifying existence of Ghostscript application in the following location: <path\ghostscript executable>

  Cause: The ATTACHMENT PRINT CONFIGURATION > GHOSTSCRIPT APPLICATION rule key is incorrect or misspelled.

  Action: Verify that this value is correct and is not misspelled. Correct as needed.

- Setting -sDEVICE parameter for printer device

  Cause: In the ATTACHMENT PRINT CONFIGURATION Rule, the printer, for which the user is attempting to print to, may not have a GS Device value or the rule key for the printer may not exist.

  Action: Verify that the printer exists in the Rule and that the GS Device value isn't missing.

- Calling sdbp_call_url stored procedure

  Cause: In the SA_INTERNET_INTEGRATION table, the value of the SIA_URL may be incorrect. This value should match the SIA address in which the user is signed into. An example of this would be: http://spl-paris.us.oracle.com:1715/synergen/

  Action: Verify that the SIA_URL is correct. NOTE: If there are multiple records in this table, the record with the most current TIMESTAMP value is used.

SA_REPORT_QUEUE Table

The SA_REPORT_QUEUE database table is also helpful for troubleshooting print attachment failures. Records created in this table by the print attachment functionality have a value of 'ATTACHMENT' in the OS_MODE field.

SA_REPORT_QUEUE Columns and their meanings, for attachments sent directly to printer.

Column Name	Values or Meaning
PLANT	The Plant of the user who submitted the report.
REPORT_ID	The report number for which the attachment is associated with.
REPORT_SEQ_NO	System generated sequence number.

Column Name	Values or Meaning
REPORT_STATUS	Possible statuses and their meanings: **Queued**: The application attempted to generate the attachment but failed in the process before the Java Printing program was called. **JavaPrint processing**: The error occurred during the call to the Java Printing program. **Failed**: The error occurred in the Java Printing program. **Completed Date/Time**: The print process completed successfully (the report was successfully submitted to the printer, but not necessarily printed by the printer).
DESTYPE	This will always say "Printer".
DESNAME	The name of the printer to which the attachment was sent.
DESFORMAT	This will always say "PS" (Postscript).
RUN_DATE	System date when the record was inserted.
WHERE_CLAUSE	The location and name of the PDF file that was submitted for printing. For BLOB attachments, the location will be the Repcache directory where the BLOB was extracted.
ORDER_BY	The location and the name of the Postscript file that was generated by the Ghostscript application. The Java Print program will send this file to the printer.
SUBMITTED_BY	The user who submitted the report.
SUBMITTED_DATE	System date when the record was inserted.
OS_MODE	This will always say "ATTACHMENT".
COPIES	This should always be NULL.

NOTE: If the print attachment functionality errors out early in the process, there may be no record in this table because the database will rollback the insert.

Limitations

The following are known limitations of the Print PDF Attachments Directly to Printer functionality.

- This functionality works only with PDF format attachments.
- This functionality is available only in the following modules:

  Work Order (WORKORD)

  Work Order Task (WOTASK)

  Benchmark Work Order (BENCHWO)

  Fleet Work Order (FLEETWO)

  Fleet Bench Work Order (BENCHFLT)
- This functionality is not available from Scheduling modules at this time.
- This functionality may not work correctly in a multiple Oracle Utilities Work and Asset Management application server environment.
- Local attachments (C: drive attachments, etc.) do not print.
- Attachments with HTTP:// type file paths are not supported at this time.

- Landscape attachments do not print correctly.
- When using the Print WO w/Documents Action, the attachments will most likely print BEFORE the Work Order report because the attachments printing process is faster than the Oracle Reports printing process.
- The Printer must support Postscript printing.
- Some printers may not be supported by the Ghostscript application.
- The printer the user is printing to must be installed on the application server, where the Oracle Utilities Work and Asset Management application is running.
- Users may or may not be able to print attachments that are located on network drive that is different than the network drive on which the Oracle Utilities Work and Asset Management application is running, because of network security settings and other factors.

IMPORTANT: Because of possible network security issues, it is highly recommended that you test printing attachments located on separate network drives, if you plan to allow users to print attachments that are not on the same network drive as the application server or are not stored in the database as BLOBs. If you do encounter difficulties printing to other drives, it is recommended that you create an Attachments directory on the server where the Oracle Utilities Work and Asset Management application is running.

Document Control Module

The Document Control module allows you to enter and maintain the location of external attachments to the system.

Fields

Sequence No.: Document ID

The record number is comprised of a unique ID (Ex. "ILB0002"). Document Control record numbers are typically set to be created manually.

TABLE NAME - SA_DOCUMENT - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 409: Document Classifications Codes

Type Codes fields - Define document types. Typical entries might be Text for text documents, Drawing for CAD files, WO for work order related documents, etc.

Code Table 276: Document Media Types

Media field - Define document formats. Possible document formats might be Microfiche, Electronic, Paper, etc.

Code Table 410: Document File Types

File Type field - File Types are identified by the 3-character extension that accompanies the file name. Typical entries include 'CAD', 'BMP', 'DOC', 'XLS', etc.

Copy Record

DOCUMENT - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Document to Active

Determines which users can activate document records that have the Revision Handling check box checked. Records that do not have this check box checked are not affected by this function.

MSDS Module

Manage material data safety sheets in the MSDS module.

Copy Record

MSDS - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Chemical Label Module

The List of Values for the Chemical Label List in the MSDS module is controlled by entries in the Chemical labels module. Enter a Chemical Label name, a Description, and the TDG Product name (if applicable) in the fields provided.

Copy Record

MSDSCHEM - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Specification Module

Use Specifications to develop detailed descriptions of requirements, dimensions, materials, and so on. Specifications can vary in type from Engineering to Service History to Accounting to just about anything that you need to define.

Reports

S_RPT005 - Specification Report

Lists specifications and attributes created in the Specification module of the Resource subsystem.

Specification Template Module

Fields

Sequence No.: Specification ID

The record number is comprised of a unique ID (Ex. "CAK-SPEC-2"). Specification record numbers are typically set to be created manually.

TABLE NAME - SA_SPECIFICATION_DATA -The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 37: Specification Types

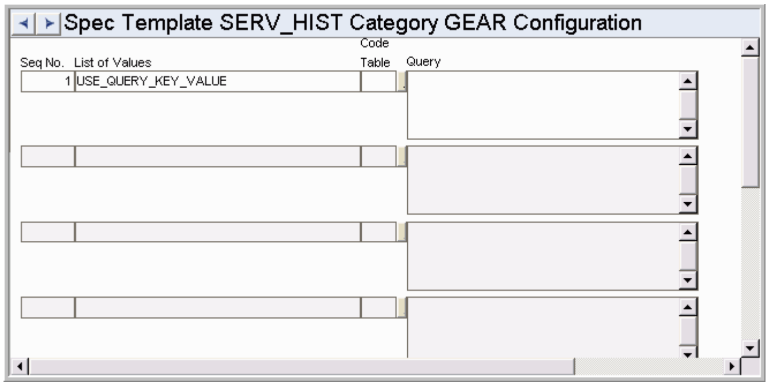
Type field - Categorize specifications for searching purposes. Typical Specification types might be Build for building specs, Eng for engineering specs, Chem for chemical specs, etc.

Linked Code Table (i.e.101): Specification Category Codes

The Code Tables linked to Code Table 37 entries are used as the default, all Specification Types in Code Table 37 are linked to Code Table to provide another level of specification grouping for searching purposes. If a Specification Type in Code Table 37 does not contain a Link to another code table, the user may enter anything into the Category field for that Spec Type. You may establish unique Specification Categories for each Specification Type by inserting a new code table and associating it to a Spec Type with the Link field in Code Table 37.

Views

Specification Configuration



Spec Template SERV_HIST Category GEAR Configuration

Seq No.	List of Values	Code Table	Query
1	USE_QUERY_KEY_VALUE		

This view appears on the Views list when you select one of the Attributes fields on the Specification Template header.

Select Configuration from the Views list to define the List of Values type that should be used to populate the Specification Value field in the Specification module. You can select a List of Values based on a Code Table or a list based on an entered query. If you select a query type, a query must be entered in the Query field. A List of Values type is not required. If no List of Values is chosen, user's can enter any value in the Specification Value field of the Specification record. The chosen List of Values can also be overridden on Specification records created from a template that uses the List of Values.

Seq No.

This Sequence Number corresponds to the Sequence number of the Attribute on the Specification Template record that will be controlled by this List of Values.

List of Values

You can choose to use a List of Values that is based on either a Code Table that exists in the system or on a custom query entered in the Query field.

Code Table

If you choose CODE_TABLE_KEY_VALUE in the List of Values field, select the Code Table that you want to use in this field.

Query

If you choose USE_QUERY_KEY_VALUE enter the custom query text in this field.

Standard Notes Module

Enter and maintain a set of standard notes in the Standard Notes module.

Fields

Sequence No.: Standard Notes ID

The record number is comprised of a unique ID (Ex. “ILB01”). Standard Notes record numbers are typically set to be created manually.

TABLE NAME - SA_STANDARD_NOTES - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 91: Standard Note Types

Type field - Categorize standard notes for searching purposes. Typical standard note types might be Buyer, Invoice, Safety, etc.

Copy Record

STDNOTES - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Procedure Module

Maintain lists of step-by-step directions.

Fields

Sequence No.: Procedure No.

The record number is comprised of a unique ID (Ex. "ILB03"). Procedure record numbers are typically set to be created manually.

TABLE NAME - SA_PROCEDURES - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 16: Procedure Types

Type field - Categorize the types of procedures at a high level. Typical Procedure Types include Electrical, Lubrication, Safety, etc. You can also search by Procedure Types.

Code Table 28: Procedure Categories

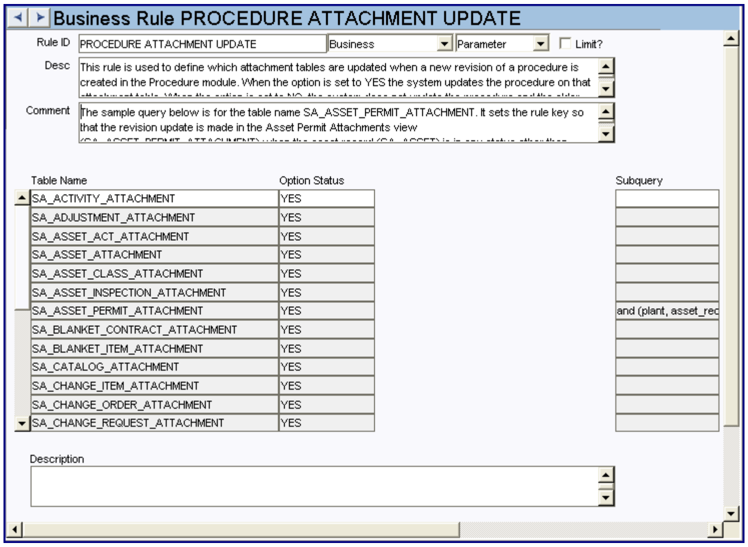
Category field - Another way to categorize procedures. Procedure Categories might include Calibration, Gaging, Bushings, etc. You can also search by Procedure Categories.

Code Table 29: Asset Type

Asset Type field - Classify assets into defined groups. Classifying assets in this manner facilitates searches by allowing queries to be conducted at a high level. The Results of Search completed at the Asset Type level will contain valuable information that can used to further narrow down user searches until the required Asset record is located. This code table is configured under the following modules: Procedure, Asset, BOM.

Business Rules

Procedure Attachment Update



Rule ID: PROCEDURE ATTACHMENT UPDATE | Business | Parameter | ☐ Limit?

Desc: This rule is used to define which attachment tables are updated when a new revision of a procedure is created in the Procedure module. When the option is set to YES the system updates the procedure on that

Comment: The sample query below is for the table name SA_ASSET_PERMIT_ATTACHMENT. It sets the rule key so that the revision update is made in the Asset Permit Attachments view

Table Name	Option Status	Subquery
SA_ACTIVITY_ATTACHMENT	YES	
SA_ADJUSTMENT_ATTACHMENT	YES	
SA_ASSET_ACT_ATTACHMENT	YES	
SA_ASSET_ATTACHMENT	YES	
SA_ASSET_CLASS_ATTACHMENT	YES	
SA_ASSET_INSPECTION_ATTACHMENT	YES	
SA_ASSET_PERMIT_ATTACHMENT	YES	and (plant, asset_rec
SA_BLANKET_CONTRACT_ATTACHMENT	YES	
SA_BLANKET_ITEM_ATTACHMENT	YES	
SA_CATALOG_ATTACHMENT	YES	
SA_CHANGE_ITEM_ATTACHMENT	YES	
SA_CHANGE_ORDER_ATTACHMENT	YES	
SA_CHANGE_REQUEST_ATTACHMENT	YES	

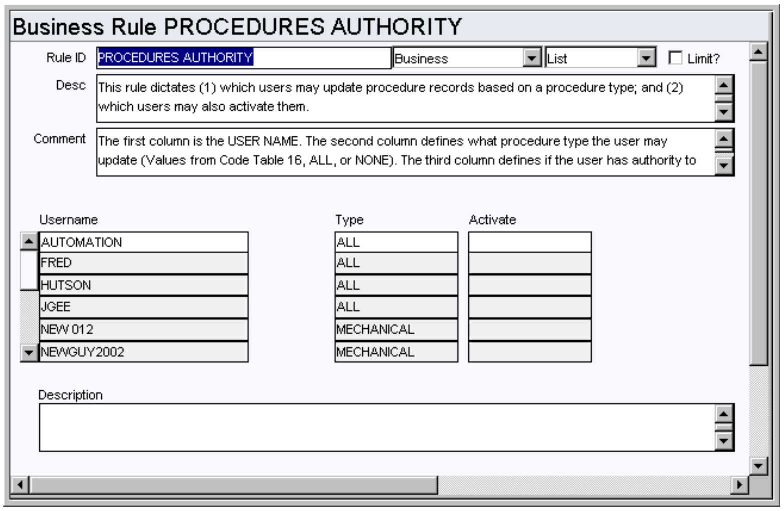
Description:

This rule is used to define which attachment tables are updated when a new revision of a procedure is created in the Procedure module. When the option is set to YES the system updates the procedure on that attachment table. When the option is set to NO, the system does not update the procedure and the older revision remains on the attachment table. Enter an SQL query in the Subquery column to set additional parameters. For example, you can restrict processing to only update the attachment table when the header is in a certain status.

The sample query below is for the table name SA_ASSET_PERMIT_ATTACHMENT. It sets the rule key so that the revision update is made in the Asset Permit Attachments view (SA_ASSET_PERMIT_ATTACHMENT) when the asset record (SA_ASSET) is in any status other than “Retired.”

and (plant, asset_record_type, asset_id) in (select plant, asset_record_type, asset_id from sa_asset t where a.plant = t.plant and a.asset_record_type = t.asset_record_type and a.asset_id = t.asset_id and t.asset_status != 'RETIRED')

Procedures Authority Rule



Business Rule PROCEDURES AUTHORITY

Rule ID: PROCEDURES AUTHORITY | Business | List | ☐ Limit?

Desc: This rule dictates (1) which users may update procedure records based on a procedure type; and (2) which users may also activate them.

Comment: The first column is the USER NAME. The second column defines what procedure type the user may update (Values from Code Table 16, ALL, or NONE). The third column defines if the user has authority to

Username	Type	Activate
AUTOMATION	ALL	
FRED	ALL	
HUTSON	ALL	
JGEE	ALL	
NEW 012	MECHANICAL	
NEWGUY2002	MECHANICAL	

Description:

Determine which users can create or update Procedure Step records based on a Procedure Type. Basic authority to Display, Select, Insert, Update and Delete Procedure records require the configuration of the PROCEDURES module in the responsibility matrix.

Username

Enter the username with the authority to update Procedure records. If a user's username is not listed the system refers to the authority for the Username DEFAULT for that person.

Type

Enter the Procedure record type that the user has authority over in the Type field next to Username.

To grant a user authority across all or none of the Procedure Types, enter ALL or NONE, respectively. If the username DEFAULT does not exist, users who are not listed in the Rule have a default authority type of NONE.

Activate

Enter Allow in the Activate column for if the user has authority to activate a procedure (DISALLOW [or blank] or ALLOW). Disallow/Blank is the default.

Copy Record

PROCEDUR - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Add/Delete Job Hazard

Grants the ability to access the Add/Delete Job Hazard action in the Procedure module.

Create New Procedure Revision

Grants access to the Create New Revision action in the Procedure module.

Modify Job Hazard

Grants the ability to access the Modify Job Hazard action in the Procedure module.

Reports

S_RPT003 - Procedures Report

Lists the Procedures created in the Procedures module of the Resource subsystem.

Job Hazard Module

Fields

Sequence No.: Hazard ID

The record number is comprised of a unique ID (Ex. "JH0001"). Job Hazard record numbers are typically set to be created manually.

TABLE NAME - SA_JOB_HAZARD - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 470: Job Hazard Type

Type field - Categorize the types of hazards at a high level.

Code Table 471: Job Hazard CategorY

Category field - Secondary level of hazard categorization.

Code Table 472: Protective Equipment

Protective Equipment field - Identify equipment that can be used to control potential hazards.

Copy Record

JOBHZRD - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Revise Procedure

Grants the ability to access the Revise Procedure action in the Job Hazard module.

Function Module

The Function module can be used to capture non-work order or non-purchasing costs such as Safety Meetings, Snow Removal and so on. Unlike a Process record, a Function record stands alone and does not receive cost-rollups from other modules.

Fields

Sequence No.: Function ID

The record number is comprised of a unique ID (Ex. "F FN001"). Function record numbers are typically set to be created manually.

TABLE NAME - FUNCTION - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 137: Function Types

Type field - Classify your organization's functions. Populate this code table in accordance with the logical grouping of functions that have been created in your Asset Hierarchy. As well as being an important means of categorizing functions it also facilitates user searches by being a selection criteria.

Code Table 110: Backlog Group

Backlog Group field - These groups can be used to group crews or to find and categorize work orders at a high level. This code table is used in the Process, Asset, Function, Work Request, Work Order, and Crew Activity Log modules.

Copy Record

FUNCTION - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Process Module

The Process module enables you to enter and maintain information pertaining to a work process rather than to a specific asset. A Process is considered a group of assets that together perform a work process. Process can be considered the top level of the Asset Hierarchy in so far as cost association. The Maintenance Manager module looks at cost buckets in a similar fashion.

Fields

Maintenance Manager Field

The Maintenance Manager field on the Process header screen can be populated with a code that represents an additional cost rollup path that can be used with assets. Create and modify Maintenance Manager codes in the Maintenance Manager module. Use of Maintenance Managers can cause the grouping of costs for a set of related, or unrelated, assets. The cost rollup to the Maintenance Manager is independent of the Asset Hierarchy cost rollup path, which is the primary benefit of this feature. As the title suggests, this can be an individual who is charged with monitoring costs for a type of asset. For example, a performance engineer may wish to monitor activities related to pumps (e.g., maintenance history, costs, runtime data). Adding a unique code under Maintenance Manager to each of the pumps for which the performance engineer is responsible will provide a means of tracking costs for all these pumps, as well as providing a mechanism of quickly sorting these pumps from the asset listing.

Planner Field

The List of Values for this field is controlled by the values set in the Planner Business Rule.

Maintenance and Production Approver Fields

Maintenance and Production Approvers are defined in the Approval Limit module. The Approval type must be set to M or B for the approval title to show up on the lists of values for these fields in the Process module. If these approval titles are included in the Work Order Defaults view of an asset they are copied to the Additional Data views on work requests and work orders where that asset is referenced. Planners can open the Additional Data view and review this information to decide which Next Approver to enter on the header record.

Department, Area, and Account Fields

When entering default Account information, the List of Values for Account Number is controlled by the entered Department and Area. Only those Account Numbers with matching Department / Area values (including no Department / Area) are valid.

Fixed Asset Field

If there is a Fixed Asset to be associated with the process, enter it in this field.

Code Tables

Code Table 138: Process Types

Process Type field - Populate Code Table 138 according to the grouping of processes that have been established for your asset hierarchy. As well as being an important means of categorizing Processes, Process Type can also be used as selection criteria on the Search Options screen.

Code Table 25: Building Codes

Building field - Define building identifiers for the asset location specific to your organization.

Code Table 110: Backlog Groups

Backlog Group field - These groups can be used to group crews or to find and categorize work orders at a high level. This code table is used in the Process, Asset, Function, Work

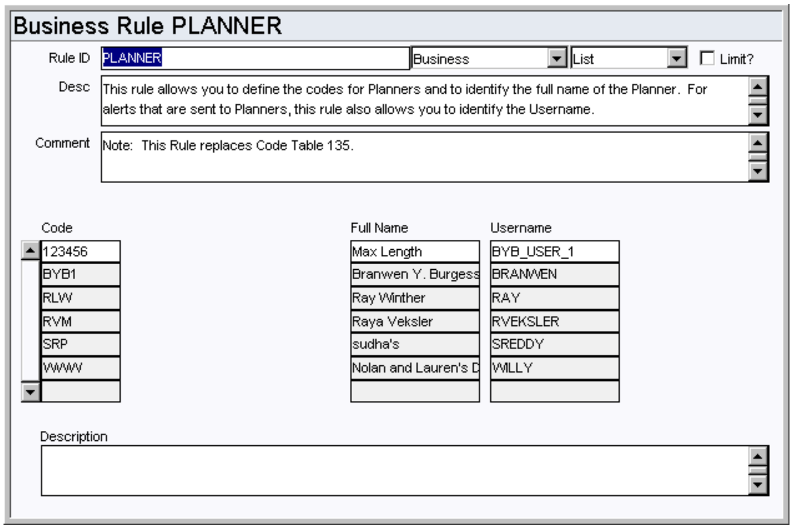
Request, Work Order, and Crew Activity Log modules.

Code Table 231: Location

Location field - Define codes for asset locations specific to the client organization. The Location field is searchable from the Search Options screen.

Business Rules

Planner Rule



Business Rule PLANNER

Rule ID: PLANNER | Business | List | ☐ Limit?

Desc: This rule allows you to define the codes for Planners and to identify the full name of the Planner. For alerts that are sent to Planners, this rule also allows you to identify the Username.

Comment: Note: This Rule replaces Code Table 135.

Code	Full Name	Username
123456	Max Length	BYB_USER_1
BYB1	Branwen Y. Burgess	BRANWEN
RLW	Ray Winther	RAY
RVM	Raya Veksler	RVEKSLER
SRP	sudha's	SREDDY
WWW	Nolan and Lauren's D	WILLY

Description

Define planner codes, and identify the full names and usernames associated to each code. These codes are used when identifying a planner on work records.

The user associated with the code receives an alert when an event occurs where an alert would be sent to the planner. For example, when a planner plans parts against a work order and needs to be notified when the parts have arrived. This does not mean that the system is configured to send alerts regarding any record where a planner is indicated.

Code

Enter the codes for planners in the Code column. Each code must be unique.

Full Name

Enter the full name of the person associated with the code. A person can be listed on more than one code.

Username

Enter the username of the person associated with the code. Since a person can be listed on more than one code, the username can be listed more than once as well.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Work Order Process

Grants the ability to create a work order by selecting the action on a Process record.

Create Work Request Process

Grants the ability to create a work request by selecting the action on a Process record.

Copy Record

PROCESS - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reports

S_RPT006 - Process Report

Lists the processes created in the Process module of the Resource subsystem.

S_RPT007 - Process Report with Asset Detail

Lists the processes created in the Process module of the Resource subsystem along with a breakdown of the assets attached.

Maintenance Manager Module

Several modules reference a Maintenance Manager field. Codes for this field are created and managed in the Maintenance Manager Module.

In the Process modules this code can represent an additional cost rollup path that can be used with assets. Use of Maintenance Managers can cause the grouping of costs for a set of related, or unrelated, assets. The cost rollup to the Maintenance Manager is independent of the Asset Hierarchy cost rollup path, which is the primary benefit of this feature. As the title suggests, this can be an individual who is charged with monitoring costs for a type of asset. For example, a performance engineer may wish to monitor activities related to pumps (e.g., maintenance history, costs, runtime data). Adding a unique code under Maintenance Manager to each of the pumps for which the performance engineer is responsible will provide a means of tracking costs for all these pumps, as well as providing a mechanism of quickly sorting these pumps from the asset listing.

Copy Record

MAINTMGR - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Keys and Locks Module

Code Tables

Code Table 515: Set Category (User)

Type field - Define codes to further define key and lock categories.

Chapter 4

Maintenance Subsystem

Work Request Module

Fields

Sequence No.: Work Request No.

The record number is comprised of a unique ID (Ex. “0100051”). Work record numbers are typically set to be system generated. Setting them to be user created is not recommended.

TABLE NAME - SA_WORK_REQUEST - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

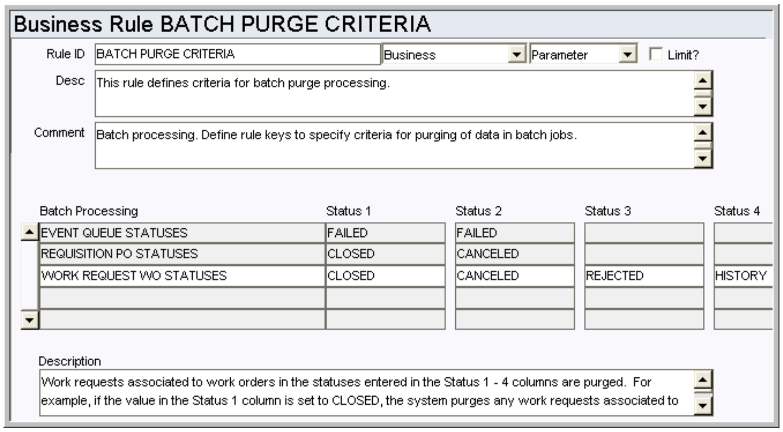
Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate approvers for work requests in the Approval Limit module under Approvals and Routes in the Administration subsystem.

Business Rules

Batch Purge Criteria Rule



Rule ID: BATCH PURGE CRITERIA | Business | Parameter | ☐ Limit?

Desc: This rule defines criteria for batch purge processing.

Comment: Batch processing. Define rule keys to specify criteria for purging of data in batch jobs.

Batch Processing	Status 1	Status 2	Status 3	Status 4
EVENT QUEUE STATUSES	FAILED	FAILED		
REQUISITION PO STATUSES	CLOSED	CANCELED		
WORK REQUEST WO STATUSES	CLOSED	CANCELED	REJECTED	HISTORY

Description: Work requests associated to work orders in the statuses entered in the Status 1 - 4 columns are purged. For example, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to

Define the status values which determine when to delete obsolete data. Records are deleted when batch purge processing runs. Enter the applicable statuses in the Status 1, Status 2, and Status 3 columns for each record type. For example, for work requests, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to work orders in CLOSED status.

Batch Processing

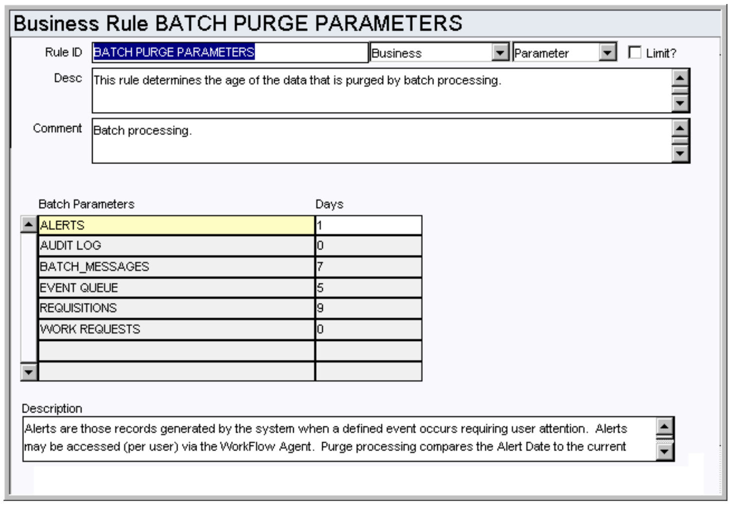
EVENT QUEUE STATUSES - Delete event queue entries that are in the statuses identified in the status columns.

REQUISITION PO STATUSES - Delete requisitions associated with purchase orders in the statuses identified in the status columns. Typically, Requisitions are considered unnecessary after the PO has been CLOSED or CANCELED.

WORK REQUEST WO STATUSES - Delete work requests associated to work orders that are in the statuses identified in the status columns. Recommended options for Status 1 - 4 include work orders in CLOSED, CANCELED, HISTORY, or REJECTED status. Although it is possible, it is NOT recommended that you purge work requests associated to work orders in PLANNING, PENDING APPROVAL, APPROVED, ACTIVE or FINISHED status.

STATUS 1, STATUS 2, STATUS 3 - These columns indicate the statuses for the records that are purged. Status 1 is the prime status to be deleted. Status 2 and 3 are other desired statuses.

Batch Purge Parameters Rule



Rule ID: BATCH PURGE PARAMETERS | Business | Parameter | ☐ Limit?

Desc: This rule determines the age of the data that is purged by batch processing.

Comment: Batch processing.

Batch Parameters	Days
ALERTS	1
AUDIT LOG	0
BATCH_MESSAGES	7
EVENT QUEUE	5
REQUISITIONS	9
WORK REQUESTS	0

Description: Alerts are those records generated by the system when a defined event occurs requiring user attention. Alerts may be accessed (per user) via the WorkFlow Agent. Purge processing compares the Alert Date to the current

As system data ages, it often becomes of little or no value to users. Purging old data regularly prevents tables from growing too large and helps maintain a quick system response time when querying those tables.

The Batch Purge Parameters Rule defines, per specific type of data, the age of a record before batch processes purges it. Note that the specific routines called for purging are already defined, purging either a single record at a time or a header record and its associated view, whichever is appropriate.

Batch Parameters and Days

ALERTS - Set the number of days the system should retain Alerts on the home page. Purge processing compares the Alert Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

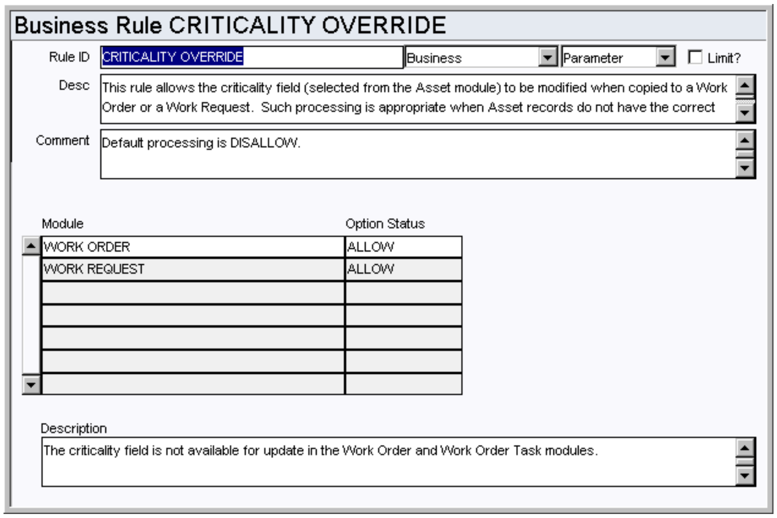
AUDIT LOG - Set the number of days the system should retain Audit Log entries. Purge processing compares the date that the entry was made to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

BATCH_MESSAGES - Messages generated by batch processing and are stored as records in the Job Manager module so that you can easily access and review them at any time. Purge processing compares the Batch Message Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

REQUISITIONS - Purge Processing compares the PO Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the Requisition is deleted from the system.

WORK REQUESTS - Purge Processing compares the Work Order Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the work request is deleted from the system.

Criticality Override Rule



Business Rule CRITICALITY OVERRIDE

Rule ID: CRITICALITY OVERRIDE | Business | Parameter | ☐ Limit?

Desc: This rule allows the criticality field (selected from the Asset module) to be modified when copied to a Work Order or a Work Request. Such processing is appropriate when Asset records do not have the correct

Comment: Default processing is DISALLOW.

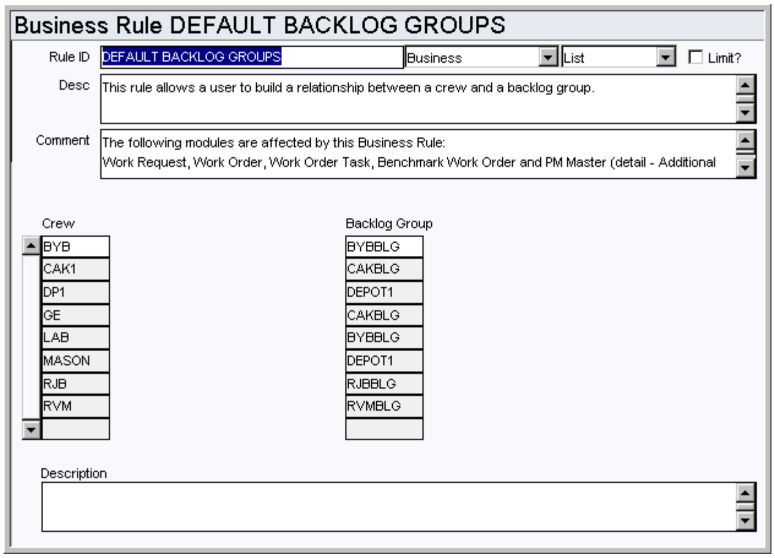
Module	Option Status
WORK ORDER	ALLOW
WORK REQUEST	ALLOW

Description: The criticality field is not available for update in the Work Order and Work Order Task modules.

Control modification of the Criticality field on Work Order and Work Request records. The Criticality field is defined on the Asset record then copied onto work records when an asset is referenced. Set the option status to Allow or Disallow to control whether or not the field can be modified. Allowing modification is appropriate if your Asset records generally have no criticality or an incorrect ciriticality assigned to them.

The Criticality field is the first Priority field on work records. The default is to DISALLOW if the field is left blank.

Default Backlog Groups Rule



Business Rule DEFAULT BACKLOG GROUPS

Rule ID: DEFAULT BACKLOG GROUPS | Business | List | ☐ Limit?

Desc: This rule allows a user to build a relationship between a crew and a backlog group.

Comment: The following modules are affected by this Business Rule:
Work Request, Work Order, Work Order Task, Benchmark Work Order and PM Master (detail - Additional

Crew	Backlog Group
BYB	BYBBLG
CAK1	CAKBLG
DP1	DEPOT1
GE	CAKBLG
LAB	BYBBLG
MASON	DEPOT1
RJB	RJBBLG
RVM	RVMBLG

Description:

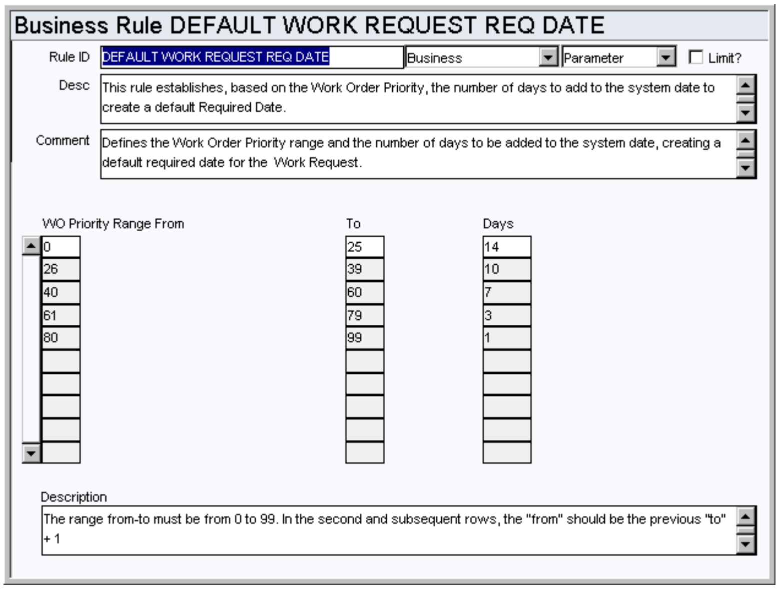
The Default Backlog Group business rule allows a user to build a relationship between a crew and a backlog group for Work Requests, Work Order Tasks, Benchmark Work Order Tasks, PM Masters, and schedules.

An example of how the concept of a backlog crew may be used is that Crew A (Crew) works 1st shift and Crew B (Backlog Group) works 2nd or 3rd shift and takes on any unfinished tasks originally scheduled for Crew A (Crew) on 1st shift.

Crew and Backlog Group

Enter valid Crew codes (Code Table 15) in the Crew column. In the Backlog Group column enter Backlog Group codes (Code Table 110) associated with the Crew.

Default Work Request Req Date Rule



Business Rule DEFAULT WORK REQUEST REQ DATE

Rule ID: DEFAULT WORK REQUEST REQ DATE — Business — Parameter — ☐ Limit?

Desc: This rule establishes, based on the Work Order Priority, the number of days to add to the system date to create a default Required Date.

Comment: Defines the Work Order Priority range and the number of days to be added to the system date, creating a default required date for the Work Request.

WO Priority Range From	To	Days
0	25	14
26	39	10
40	60	7
61	79	3
80	99	1

Description: The range from-to must be from 0 to 99. In the second and subsequent rows, the "from" should be the previous "to" + 1

Establishes the work order priority range and the number of days to be added to the system date, to create a default required date for a work request. If the total priority is blank the system interprets a 0 value for the total priority.

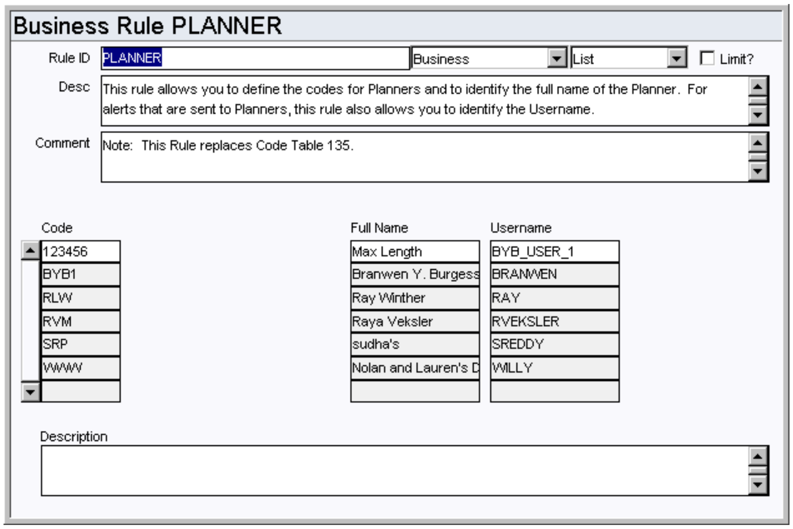
WO Priority Range From / To

Define the Work Order Priority ranges. The overall range must cover 0-99. In the second and subsequent rows the FROM value should be the previous row's TO value plus 1.

Days

Determine the number of days to be added to the system date for each Priority range.

Planner Rule



Business Rule PLANNER

Rule ID: PLANNER | Business | List | ☐ Limit?

Desc: This rule allows you to define the codes for Planners and to identify the full name of the Planner. For alerts that are sent to Planners, this rule also allows you to identify the Username.

Comment: Note: This Rule replaces Code Table 135.

Code	Full Name	Username
123456	Max Length	BYB_USER_1
BYB1	Branwen Y. Burgess	BRANWEN
RLW	Ray Winther	RAY
RVM	Raya Veksler	RVEKSLER
SRP	sudha's	SREDDY
WWW	Nolan and Lauren's D	WILLY

Description:

Define planner codes, and identify the full names and usernames associated to each code. These codes are used when identifying a planner on work records.

The user associated with the code receives an alert when an event occurs where an alert would be sent to the planner. For example, when a planner plans parts against a work order and needs to be notified when the parts have arrived. This does not mean that the system is configured to send alerts regarding any record where a planner is indicated.

Code

Enter the codes for planners in the Code column. Each code must be unique.

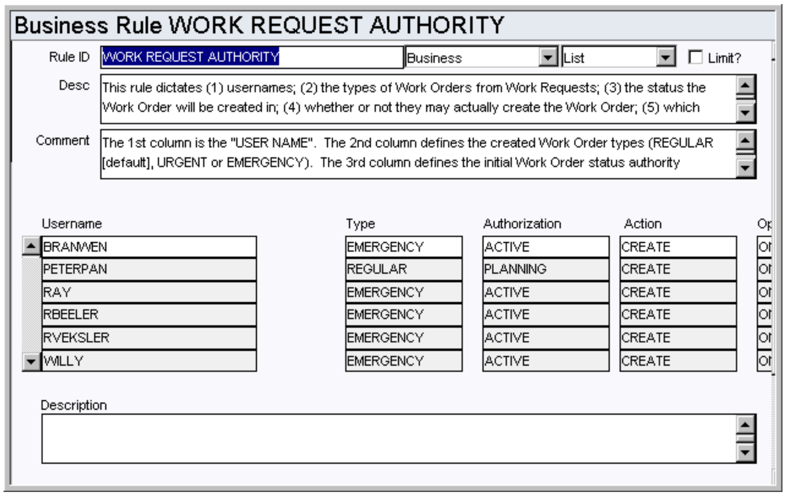
Full Name

Enter the full name of the person associated with the code. A person can be listed on more than one code.

Username

Enter the username of the person associated with the code. Since a person can be listed on more than one code, the username can be listed more than once as well.

Work Request Authority Rule



Business Rule WORK REQUEST AUTHORITY

Rule ID: WORK REQUEST AUTHORITY | Business | List | ☐ Limit?

Desc: This rule dictates (1) usernames; (2) the types of Work Orders from Work Requests; (3) the status the Work Order will be created in; (4) whether or not they may actually create the Work Order; (5) which

Comment: The 1st column is the "USER NAME". The 2nd column defines the created Work Order types (REGULAR [default], URGENT or EMERGENCY). The 3rd column defines the initial Work Order status authority

Username	Type	Authorization	Action
BRANWEN	EMERGENCY	ACTIVE	CREATE
PETERPAN	REGULAR	PLANNING	CREATE
RAY	EMERGENCY	ACTIVE	CREATE
RBEELER	EMERGENCY	ACTIVE	CREATE
RVEKSLER	EMERGENCY	ACTIVE	CREATE
WILLY	EMERGENCY	ACTIVE	CREATE

Description:

Determines the users that can create work orders from work requests and the conditions associated with creating those work orders.

Username
Enter the names of the users who have the authority to create work orders from work requests. Since the values entered for DEFAULT will apply all users that are not specifically listed, make sure that the values entered for DEFAULT are set according to the authority you want to give unlisted users.

Type
Defines the type of work order created from a work request. The values are REGULAR (default), URGENT, or EMERGENCY. Users granted EMERGENCY can also enter URGENT and REGULAR. Users granted URGENT can also enter REGULAR.

Authorization
This column determines what status will be assigned to a work order created by that particular user. The values are PLANNING (default), APPROVED or ACTIVE.

Action
Activates or deactivates the user's ability to create a work order from a work request. Options are:

CREATE - allow users to generate work orders from work requests.

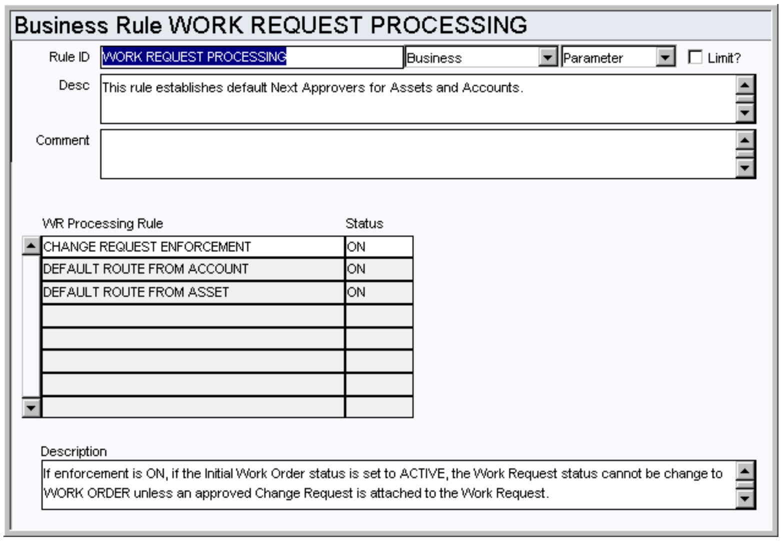
NOCREATE - (default) prevents the user from generating work orders from work requests.

Option
Set Option to ON or OFF depending on whether or not you want to allow the user to be able to add to existing work orders from work requests. The default is OFF.

Status
Defines the work order status that a work request can be added to --(PLANNING [default], APPROVED or ACTIVE).

Delete if WO
Determines whether or not the user can delete work requests if there is a work order associated with it. DISALLOW is the default.

Work Request Processing Rule



Business Rule WORK REQUEST PROCESSING

Rule ID: WORK REQUEST PROCESSING | Business | Parameter | ☐ Limit?

Desc: This rule establishes default Next Approvers for Assets and Accounts.

Comment:

WR Processing Rule	Status
CHANGE REQUEST ENFORCEMENT	ON
DEFAULT ROUTE FROM ACCOUNT	ON
DEFAULT ROUTE FROM ASSET	ON

Description: If enforcement is ON, if the Initial Work Order status is set to ACTIVE, the Work Request status cannot be change to WORK ORDER unless an approved Change Request is attached to the Work Request.

Establish whether or not the system checks for a change request before allowing a status change on a work request. Also set default Approval Titles and choose whether you want the default to come from the Account or Asset record associated to the request. If the Approval Route field is empty when a work request in CREATED status is saved, the system will populate the field with the Approver designated in the rule.

WR Processing Rule, Status, and Type

CHANGE REQUEST ENFORCEMENT - If this rule key is set to ON and the initial work order status is set to ACTIVE, the work request status cannot be changed to WORK ORDER until an approved change request is attached to the work request.

DEFAULT ROUTE FROM ACCOUNT - If this rule key is set to on ON and a work request in Created status is saved with the Approval Route field left blank, the system enters the Work Request route indicated on the referenced Account record. If the DEFAULT APPROVER FROM ASSET rule key is also set to ON this rule key will be overridden.

DEFAULT ROUTE FROM ASSET - If this rule key is set to on ON and a work request in Created status is saved with the Approval Route field left blank, the system enters the Work Request route indicated on the referenced Asset record. If both the DEFAULT APPROVER FROM ACCOUNT rule key and this rule key are set to ON the system uses this rule key.

INCLUDE P WORK TYPE - When the status of this rule key is set to on the system will include P type Work Orders when showing possible duplicate work records as a new work request is created.

Batch Processes

Purge Work Requests - sdbp_purge_work_requests;

Allows you to enable or disable a batch job to purge work requests in Work Order status where the work order is in a certain status. Status and age are defined in the Batch Purge Parameters and Batch Purge Criteria business rules.

Code Tables

Code Table 10: Failure Codes (Length = 10)

Failure Code field - Define types of equipment failure that may occur. Typical Failure Codes may include Corrosion, Distortion, Erosion, etc.

Code Table 110: Backlog Group (Length = 6)

Backlog Group field - These groups can be used to group crews or to find and categorize work orders at a high level. This code table is used in the Process, Asset, Function, Work Request, Work Order, and Crew Activity Log modules.

Code Table 25: Building Codes (Length = 20)

Building field - Define building identifiers for the asset location specific to your organization. The Building field is searchable from the Search Options screen, and can be useful in finding assets when only the building location is known.

Code Table 2: Maintenance Classes (Length = 10)

Class/Catg. field (first field) - Define classes describing types of work. The Maintenance Class field can be searched on the Work Request and Work Order Search Options screens.

Code Table 3: Maintenance Categories (Length = 10)

Class/Catg. field (second field) - Define categories describing types of work. The Maintenance Category field can be searched on the Work Request and Work Order Search Options screens.

Code Table 40: Criticality Codes (Length = 1)

Criticality field - The criticality number represents the relative work or safety impact of the asset. This number is later used by the system to calculate the overall priority of work orders.

The system contains default entries for Code Table 40, however, you can alter the data. We recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of priority on work orders and work requests.

Code Table 41: Work Priority Codes (Length = 1)

Priority field (second field) - Define codes that indicate the relative work or safety impact of the work that is to be done. This information is later used by the system to calculate the overall priority of work orders.

By default the system contains entries for Code Table 41. The user has the ability to alter the data in this Code Table, however we recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of Priority.

Code Table 139: Downtime Codes (Length = 10)

Type field (next to Downtime check box) - Define downtime types. Typical Downtime Codes might be 'Shutdown', 'Annual Turnaround', etc.

Copy Record

WORKREQ - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Work Request

Grants the ability to create a Work Request record. This function adds the Create Work Request action to the home page Actions list.

Create Work Request Asset

Grants the ability to create a Work Request record by selecting the action on an Asset record.

Create Work Request Component

Grants the ability to create a work request by selecting the action on a Component record.

Create Work Request Fleet Asset

Grants access to the Create Work Request action from Fleet Asset records.

Create Work Request Process

Grants the ability to create an Work Request record by selecting the action on a Process record.

Reports

S_RPT042 - Work Request Summary Report

Lists information from a work request.

Work Design Module

Fields

Sequence No.: Work Design No.

The record number is comprised of a unique ID (Ex. "0700014"). Work Design numbers are usually system-generated.

TABLE NAME - SA_WORK_DESIGN - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

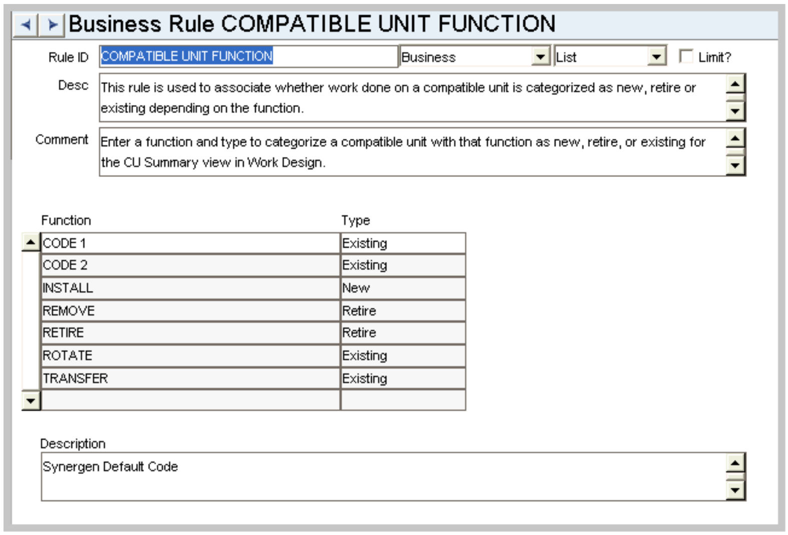
Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate approvers for work designs the Approval Limits module of the Administration subsystem under Approvals and Routes.

Business Rules

Compatible Unit Function Rule



Business Rule COMPATIBLE UNIT FUNCTION

Rule ID: COMPATIBLE UNIT FUNCTION | Business | List | ☐ Limit?

Desc: This rule is used to associate whether work done on a compatible unit is categorized as new, retire or existing depending on the function.

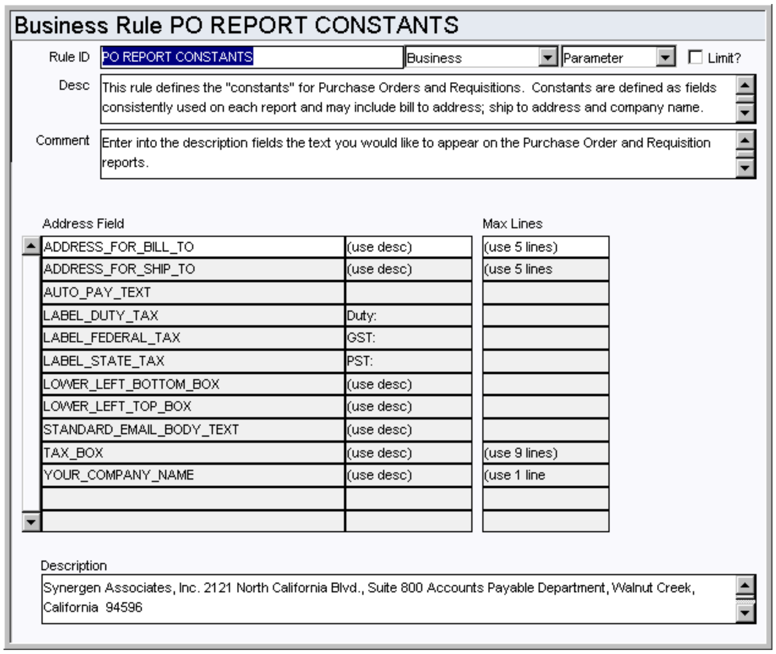
Comment: Enter a function and type to categorize a compatible unit with that function as new, retire, or existing for the CU Summary view in Work Design.

Function	Type
CODE 1	Existing
CODE 2	Existing
INSTALL	New
REMOVE	Retire
RETIRE	Retire
ROTATE	Existing
TRANSFER	Existing

Description: Synergen Default Code

This rule is used to associate whether work done on a compatible unit is categorized as new, retire or existing depending on the function. Enter a function and type to categorize a compatible unit with that function as new, retire, or existing for the CU Summary view in Work Design.

PO Report Constants Rule



Business Rule PO REPORT CONSTANTS

Rule ID: PO REPORT CONSTANTS | Business | Parameter | ☐ Limit?

Desc: This rule defines the "constants" for Purchase Orders and Requisitions. Constants are defined as fields consistently used on each report and may include bill to address; ship to address and company name.

Comment: Enter into the description fields the text you would like to appear on the Purchase Order and Requisition reports.

Address Field		Max Lines
ADDRESS_FOR_BILL_TO	(use desc)	(use 5 lines)
ADDRESS_FOR_SHIP_TO	(use desc)	(use 5 lines
AUTO_PAY_TEXT		
LABEL_DUTY_TAX	Duty:	
LABEL_FEDERAL_TAX	GST:	
LABEL_STATE_TAX	PST:	
LOWER_LEFT_BOTTOM_BOX	(use desc)	
LOWER_LEFT_TOP_BOX	(use desc)	
STANDARD_EMAIL_BODY_TEXT	(use desc)	
TAX_BOX	(use desc)	(use 9 lines)
YOUR_COMPANY_NAME	(use desc)	(use 1 line

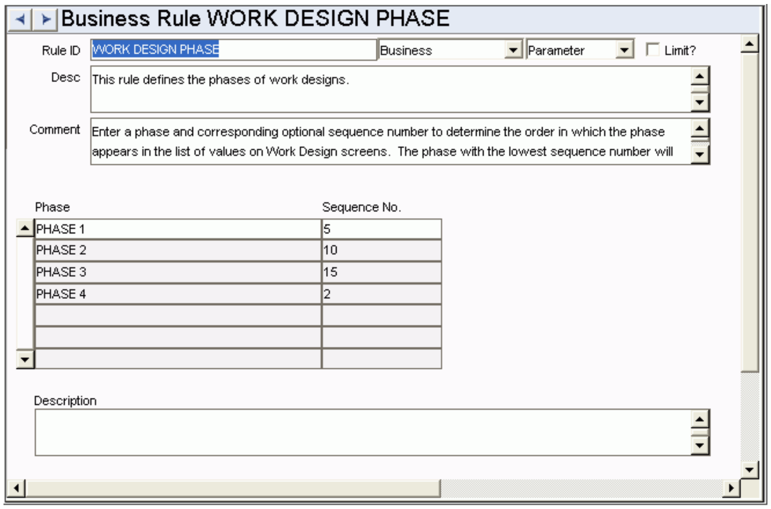
Description: Synergen Associates, Inc. 2121 North California Blvd., Suite 800 Accounts Payable Department, Walnut Creek, California 94596

The value entered for the LABEL_DU**TY**_TAX key is displayed on the Design Estimate view of the Work Design module. If no value is entered here "Duty" is used as the default label.

Address Field and Max Lines

LABEL_DUTY_TAX - The label entered here is displayed on the Design Estimate view of the Work Design module. If no value is entered here “Duty” is used as the default label.

Work Design Phase Rule



Business Rule WORK DESIGN PHASE

Rule ID	WORK DESIGN PHASE	Business	Parameter

☐ Limit?

Desc: This rule defines the phases of work designs.

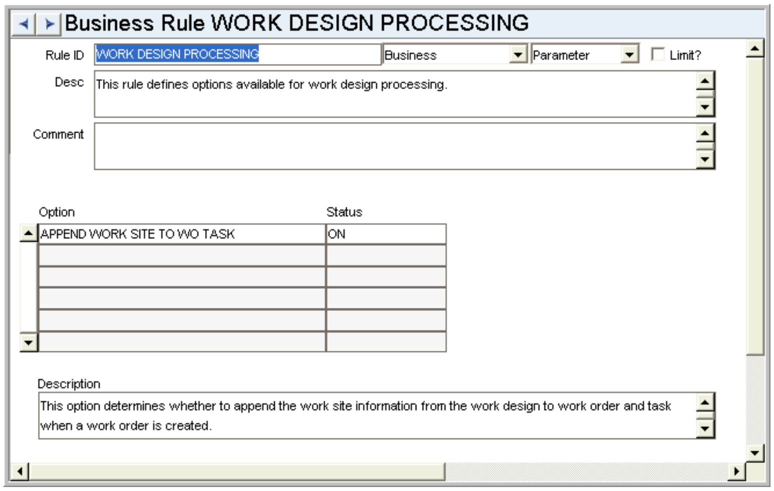
Comment: Enter a phase and corresponding optional sequence number to determine the order in which the phase appears in the list of values on Work Design screens. The phase with the lowest sequence number will

Phase	Sequence No.
PHASE 1	5
PHASE 2	10
PHASE 3	15
PHASE 4	2

Description

Use this rule to define the phases that are used on work design records for your organization. The corresponding sequence number determines the order in which the phase appears in the list of values on the Work Design screen. The phase with the lowest sequence number will be the default phase when new Work Design records are created.

Work Design Processing Rule



Business Rule WORK DESIGN PROCESSING

Rule ID	WORK DESIGN PROCESSING	Business	Parameter

☐ Limit?

Desc: This rule defines options available for work design processing.

Comment

Option	Status
APPEND WORK SITE TO WO TASK	ON

Description: This option determines whether to append the work site information from the work design to work order and task when a work order is created.

This rule defines options available for work design processing.

APPEND WORK SITE TO WO TASK - Set this rule key to YES to have the system copy work site information into the description field on task records created from the work design.

Code Tables

Code Table 22: Vendor Characteristic Types (Characteristics View)

Contractor field - Define contractors which can be added on in the Compatible Units Contractor Bids view. The values are carried over when the compatible unit is referenced on work records.

Code Table 23 - Units for length (Length = 4)

Location view - Length field.

Code Table 159: Federal Tax Codes (Buyer Data View) (Length = 1)

Federal field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 160: State Tax Codes (Buyer Data View) (Length = 1)

State field - The code can only be one character and the Description should contain the percentage rate in the first six characters of the field.

Code Table 161: Duty Codes (Buyer Data View) (Length = 1)

Duty field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 730: Contribution in Aid to Construction (Length = 30)

Contribution Type field - Define codes to distinguish the types of contributions that might be made toward construction projects.

Code Table 731: Work Design Cost Type (Length = 30)

Cost Type field - Define codes to distinguish the types of costs that might be made toward construction projects.

Code Table 732: Location Structure Type (Length = 30)

Structure Type field - Define codes to distinguish the types of location structures that might apply for construction projects.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

UPDATE PRICING FOR WD

Grants access to the action which updates the pricing of all material, labor and equipment items on the work design.

CREATE WO FROM WORK DESIGN

Grants access to the action which creates a work order from the details on the Work Design record.

ROUTE TO DESIGNER

This function only applies to custom integration processing. Allows a Work Design to be routed to Autodesk AUD Application for design work to be done.

Reports

S_RPT154 - Work Design

Describes the work, location and compatible units needed to perform a job.

S_RPT156 - Work Design Comparison

Shows a comparison between the estimate cost summary of the work design and alternate designs that are specified in the Alternate Designs view of the work design.

S_RPT155 - Work Design Estimate

Shows a summary of cost estimates related to performing a job.

Copy Record

WODESIGN- COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Work Order Module

Fields

Sequence No.: Work Order No.

The record number is comprised of a unique ID (Ex. “0200070”). Work order numbers must be system generated. Manual creation of these record numbers could result in critical system errors when WOs are created from other records or in batch procedures.

TABLE NAME - SA_WORK_ORDER - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

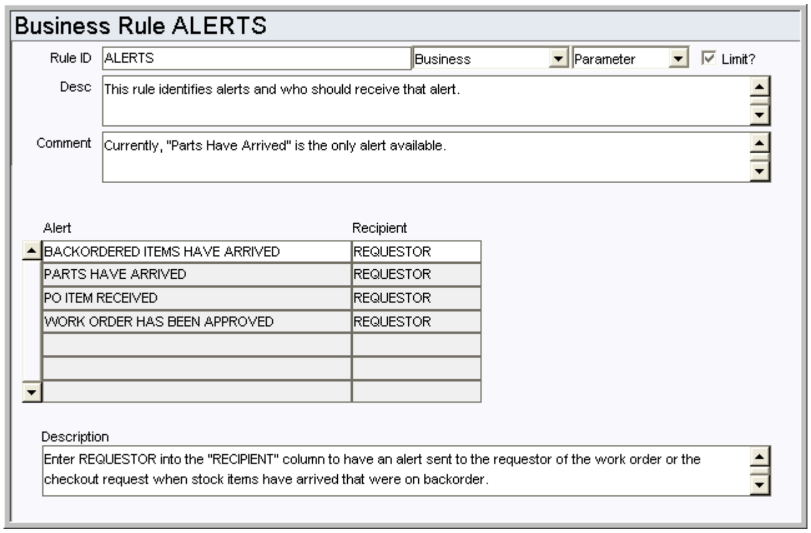
Please refer to Sequence Numbers Module for more information and examples.

Approval Route

Designate Approval Routes for work orders in the Approval Limit module under Approvals and Routes in the Administration subsystem.

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS — Business — Parameter — ☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

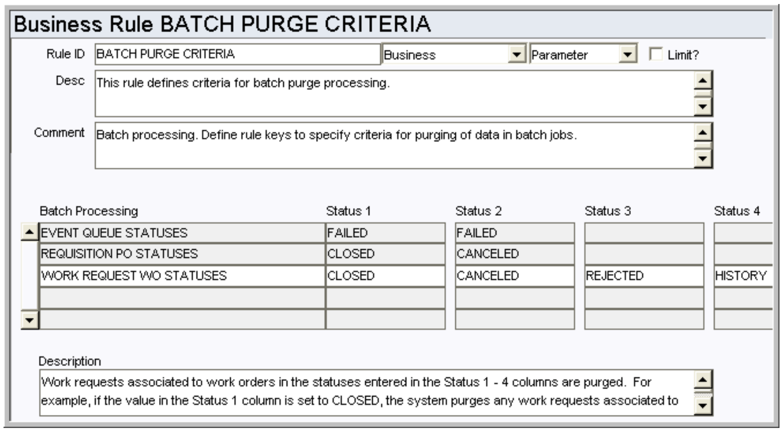
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Batch Purge Criteria Rule



Business Rule BATCH PURGE CRITERIA

Rule ID: BATCH PURGE CRITERIA

Business

Parameter

☐ Limit?

Desc: This rule defines criteria for batch purge processing.

Comment: Batch processing. Define rule keys to specify criteria for purging of data in batch jobs.

Batch Processing	Status 1	Status 2	Status 3	Status 4
EVENT QUEUE STATUSES	FAILED	FAILED		
REQUISITION PO STATUSES	CLOSED	CANCELED		
WORK REQUEST WO STATUSES	CLOSED	CANCELED	REJECTED	HISTORY

Description: Work requests associated to work orders in the statuses entered in the Status 1 - 4 columns are purged. For example, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to

Define the status values which determine when to delete obsolete data. Records are deleted when batch purge processing runs. Enter the applicable statuses in the Status 1, Status 2, and Status 3 columns for each record type. For example, for work requests, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to work orders in CLOSED status.

Batch Processing

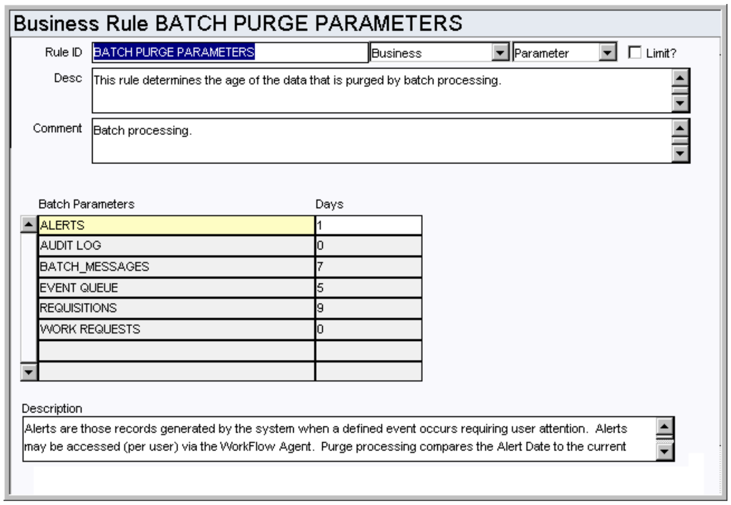
EVENT QUEUE STATUSES - Delete event queue entries that are in the statuses identified in the status columns.

REQUISITION PO STATUSES - Delete requisitions associated with purchase orders in the statuses identified in the status columns. Typically, Requisitions are considered unnecessary after the PO has been CLOSED or CANCELED.

WORK REQUEST WO STATUSES - Delete work requests associated to work orders that are in the statuses identified in the status columns. Recommended options for Status 1 - 4 include work orders in CLOSED, CANCELED, HISTORY, or REJECTED status. Although it is possible, it is NOT recommended that you purge work requests associated to work orders in PLANNING, PENDING APPROVAL, APPROVED, ACTIVE or FINISHED status.

STATUS 1, STATUS 2, STATUS 3 - These columns indicate the statuses for the records that are purged. Status 1 is the prime status to be deleted. Status 2 and 3 are other desired statuses.

Batch Purge Parameters Rule



Business Rule BATCH PURGE PARAMETERS

Rule ID: BATCH PURGE PARAMETERS | Business | Parameter | ☐ Limit?

Desc: This rule determines the age of the data that is purged by batch processing.

Comment: Batch processing.

Batch Parameters	Days
ALERTS	1
AUDIT LOG	0
BATCH_MESSAGES	7
EVENT QUEUE	5
REQUISITIONS	9
WORK REQUESTS	0

Description: Alerts are those records generated by the system when a defined event occurs requiring user attention. Alerts may be accessed (per user) via the WorkFlow Agent. Purge processing compares the Alert Date to the current

As system data ages, it often becomes of little or no value to users. Purging old data regularly prevents tables from growing too large and helps maintain a quick system response time when querying those tables.

The Batch Purge Parameters Rule defines, per specific type of data, the age of a record before batch processes purges it. Note that the specific routines called for purging are already defined, purging either a single record at a time or a header record and its associated view, whichever is appropriate.

Batch Parameters and Days

ALERTS - Set the number of days the system should retain Alerts on the home page. Purge processing compares the Alert Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

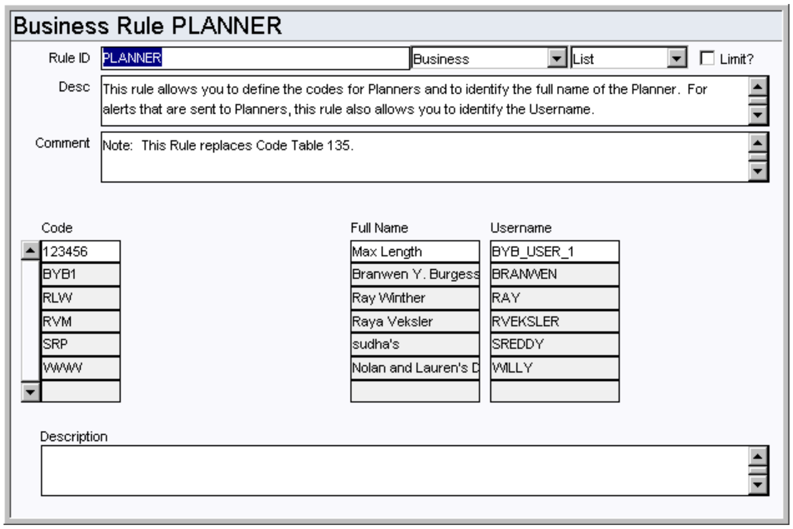
AUDIT LOG - Set the number of days the system should retain Audit Log entries. Purge processing compares the date that the entry was made to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

BATCH_MESSAGES - Messages generated by batch processing and are stored as records in the Job Manager module so that you can easily access and review them at any time. Purge processing compares the Batch Message Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

REQUISITIONS - Purge Processing compares the PO Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the Requisition is deleted from the system.

WORK REQUESTS - Purge Processing compares the Work Order Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the work request is deleted from the system.

Planner Rule



Business Rule PLANNER

Rule ID: PLANNER

Business

List

☐ Limit?

Desc: This rule allows you to define the codes for Planners and to identify the full name of the Planner. For alerts that are sent to Planners, this rule also allows you to identify the Username.

Comment: Note: This Rule replaces Code Table 135.

Code	Full Name	Username
123456	Max Length	BYB_USER_1
BYB1	Branwen Y. Burgess	BRANWEN
RLW	Ray Winther	RAY
RVM	Raya Veksler	RVEKSLER
SRP	sudha's	SREDDY
WWW	Nolan and Lauren's D	WILLY

Description:

Define planner codes, and identify the full names and usernames associated to each code. These codes are used when identifying a planner on work records.

The user associated with the code receives an alert when an event occurs where an alert would be sent to the planner. For example, when a planner plans parts against a work order and needs to be notified when the parts have arrived. This does not mean that the system is configured to send alerts regarding any record where a planner is indicated.

Code

Enter the codes for planners in the Code column. Each code must be unique.

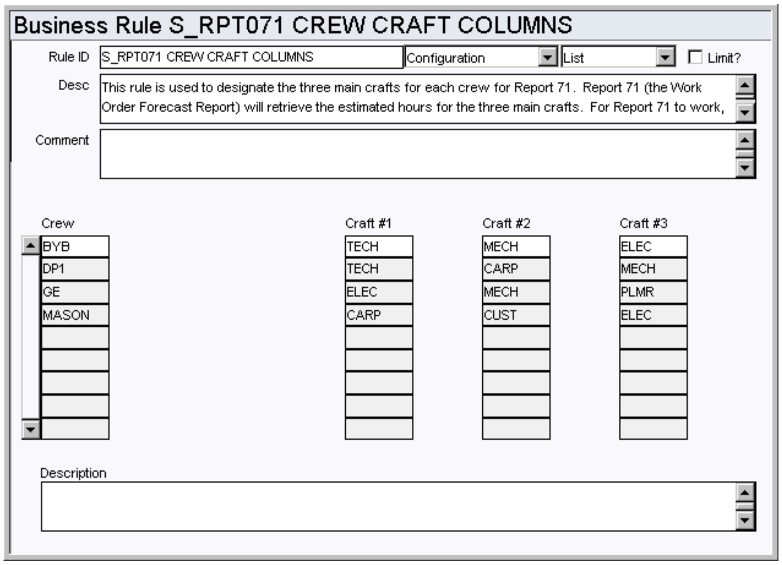
Full Name

Enter the full name of the person associated with the code. A person can be listed on more than one code.

Username

Enter the username of the person associated with the code. Since a person can be listed on more than one code, the username can be listed more than once as well.

S_RPT071 Crew Craft Columns Rule



Rule ID: S_RPT071 CREW CRAFT COLUMNS | Configuration | List

Desc: This rule is used to designate the three main crafts for each crew for Report 71. Report 71 (the Work Order Forecast Report) will retrieve the estimated hours for the three main crafts. For Report 71 to work,

Comment:

Crew	Craft #1	Craft #2	Craft #3
BYB	TECH	MECH	ELEC
DP1	TECH	CARP	MECH
GE	ELEC	MECH	PLMR
MASON	CARP	CUST	ELEC

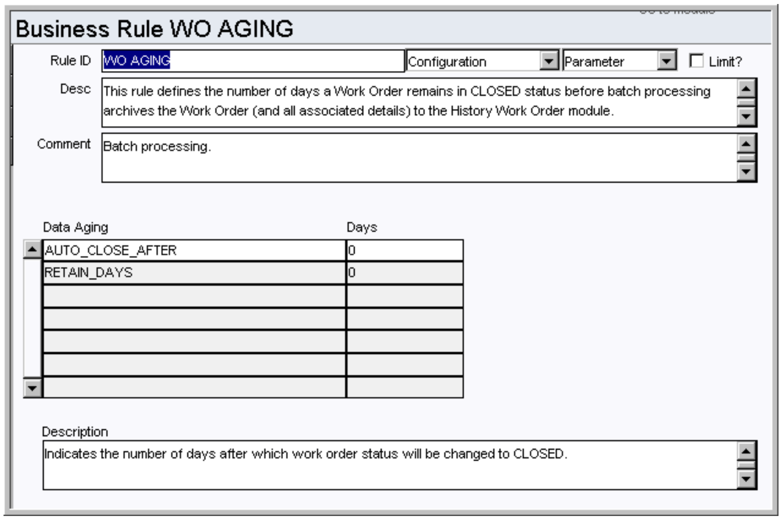
Description:

Designate the three main crafts for each crew shown on Report 71 - Work Order Forecast Report. The system will then retrieve the estimated hours for the three main crafts. For Report 71 to display the correct information, the crew and craft must be listed in this rule.

Crew, Craft #1, Craft #2, Craft #3

For each crew entered in the Crew column, a craft needs to be entered in Craft #1 . If a crew has more than one craft, use Craft #2 and Craft #3 columns. Several crews can use a single craft.

Work Order Aging Rule



Rule ID: WO AGING | Configuration | Parameter

Desc: This rule defines the number of days a Work Order remains in CLOSED status before batch processing archives the Work Order (and all associated details) to the History Work Order module.

Comment: Batch processing.

Data Aging	Days
AUTO_CLOSE_AFTER	0
RETAIN_DAYS	0

Description: Indicates the number of days after which work order status will be changed to CLOSED.

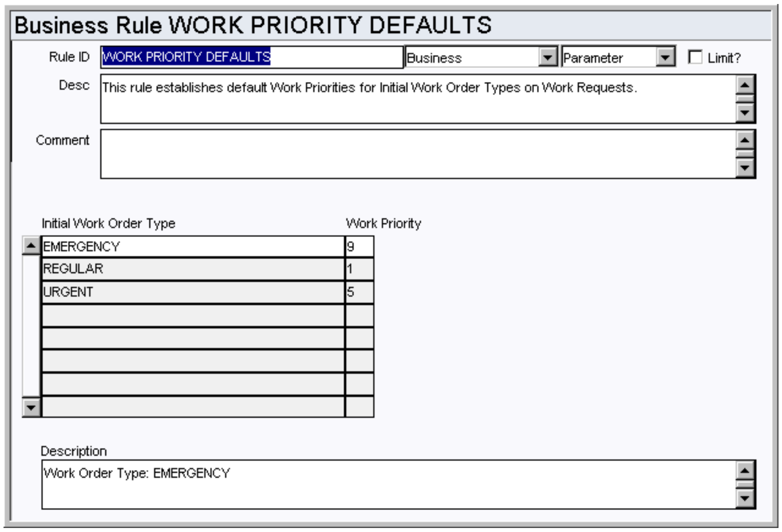
Define the number of days a work order remains in CLOSED status before batch processing archives the work order (and all associated details) to the History Work Order module.

Data Aging, and Days

AUTO_CLOSE_AFTER - The system will automatically change the work order status from FINISHED to CLOSED this number of day after the status is set to FINISHED.

RETAIN_DAYS - The number of days the work order will remain in CLOSED status before batch processing archives the work order to History.

Work Priority Defaults Rule



Business Rule WORK PRIORITY DEFAULTS

Rule ID: WORK PRIORITY DEFAULTS | Business | Parameter | ☐ Limit?

Desc: This rule establishes default Work Priorities for Initial Work Order Types on Work Requests.

Comment:

Initial Work Order Type	Work Priority
EMERGENCY	9
REGULAR	1
URGENT	5

Description: Work Order Type: EMERGENCY

Establish default Work Priorities for Initial Work Order Types on Work Request records.

Initial Work Order Type

EMERGENCY - The highest priority work orders can be set as EMERGENCY work orders. Authorized users can select Create Emergency Work Order from the Actions list on the home page to create Emergency Work Orders very quickly.

REGULAR - The lowest priority work orders for routine work.

URGENT - Mid-level priority work.

Work Priority

The lower numbers indicate a low priority, and higher numbers indicate high priority.

Batch Processes

Close Work Order - sdbp_close_work_orders;

Closes work orders in Finished status after the number of days specified in the WO Aging Business Rule.

Held for Parts - sdbp_held_for_parts;

Reviews Work Order Task Parts Requirements vs. stock inventory and direct purchases for a task. If the On-Hand quantity in a storeroom is less than the amount required for an active task or if direct purchase items ordered for a task are still not received, the Held for Parts indicator on the task is checked. If all parts required (storeroom and direct purchase) are available, the Held for Parts indicator is unchecked.

PM Cycle - sdbp_pm_cycle_job.start_job;

Reviews active PM Masters and cycles those that are due, creating work orders in the status defined in the PM Master Parameters Business Rule. If the PM is being cycled and the benchmark's component is no longer installed on the benchmark's asset, the system generates a work order with the asset from the benchmark and will not bring over the component.

Process Service Timesheet - sdbp_process_service_timesheet.post_approved_time;

Processes approved labor costs (from service timesheets) that have not yet been posted. Costs are posted to the work order task as a Labor record. If a Labor Requirement record does not yet already exist for the task, the system inserts one, then posts the cost. Once a labor charge is successfully processed, it is marked as posted.

Purge Work Order - sdbp_purge_work_order.purge_wo;
Selects the work orders that have been in Closed status for the number of days as defined in the Work Order Aging Rule, then copies them into the Work Order History tables. Each selected work order is reviewed to see how much information is to be moved to the History tables (defined in the Work Order Closeout detail). Asset History information is also inserted. Once a work order is successfully processed, the work order is deleted from the work order tables.

Purge Work Requests - sdbp_purge_work_requests;
Allows you to explicitly enable or disable a batch job to purge work requests in WORK ORDER status where the work order is in a certain status. Status and age are defined in the Batch Purge Parameters and Batch Purge Criteria business rules.

Finish WO - sdbp_finish_wo;
Updates the work order header status to Finished if either all associated tasks are in Closed, Canceled, or Finished status, or if the work order has no associated tasks.

PM Finish - sdbp_pm_finish;
Processes PM Master information for those PMs where the associated work order has been set to Finished status. This includes entering the work completion date, inserting a new Forecast record (to maintain the correct number of future cycles), and setting any skipped forecast dates to Canceled status. The next schedule date is recalculated (for calendar interval PMs) and is placed on the PM Master record.

Reset Demand Quantity - sdbp_storeroom_demand;
Recalculates the on-demand quantity for parts within the storeroom. This procedure reviews all active work order tasks, summing the quantities required across tasks for stock items. Once recalculated, the on-demand quantity for each storeroom item is updated accordingly. Note that this batch procedure is not a required procedure since standard processing maintains the storeroom on-demand quantity. This serves as an extra level of assurance that the on-demand quantities are correct as of each nightly batch run. Note that running this process could potentially be time consuming if there is a large amount of data for the system to process.

Code Tables

Code Table 2: Maintenance Classes (Length = 10)
Class/Catg. field (first field) - Define classes describing types of work. The Maintenance Class field can be searched on the Work Request and Work Order Search Options screens.

Code Table 3: Maintenance Categories (Length = 10)
Class/Catg. field (second field) - Define categories describing types of work. The Maintenance Category field can be searched on the Work Request and Work Order Search Options screens.

Code Table 41: Work Priority (Length = 1)
Priority field (second field) - Define codes that indicate the relative work or safety impact of the work that is to be done. This information is later used by the system to calculate the overall priority of work orders.

By default the system contains entries for Code Table 41. The user has the ability to alter the data in this Code Table, however we recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of Priority.

Code Table 110: Backlog Group (Length = 6)
Backlog Group field - These groups can be used to group crews or to find and categorize work orders at a high level. This code table is used in the Process, Asset, Function, Work Request, Work Order, and Crew Activity Log modules.

Code Table 120: Crew Event Types (Length = 15)

Event Type field - Define codes to identify stages completed by a crew in the work process. Examples include Finish (indicates finished work on a work order task), Start (identifies a started task), etc. This code table is also used in the Crew Activity Log module.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Activate WO Material

Grants access to the Activate WO Material Action so that users can activate work order materials prior to setting the entire work order's status to Active.

Add Customer Contributed

Allows user to add a Construction Asset in Planned status from an outside source into the Work Order Task's Construction Assets view.

Allow WO Project Update

Allows users to update the Project / Subproject on Active Work Orders as long as there are no “Actual” costs for that Work Order.

Create Emergency Work Order

Grants the ability to create an Emergency Work Order record from the home page.

Create Emergency WO Fleet Asset

Grants the ability to create an Emergency Work Order record by selecting the action on a Fleet Asset record.

Create Emergency WO Asset

Grants the ability to create an Emergency Work Order record by selecting the action on an Asset record.

Create Permit From WO

Grants access to the Create Permit action available in the on Work Order and Work Order Task records. This action creates a permit for the work record.

Create WO From Benchmark

Grants the ability to create a follow-up Work Order from a Benchmark Work Order record.

Create Work Order

Grants the ability to create a work order. This function adds the Create Work Order action to the home page Actions list.

Create Work Order Process

Grants the ability to create a Work Order record by selecting the action on a Process record.

Create Work Order Fleet Asset

Grants the ability to create a Work Order record by selecting the action on a Fleet Asset record.

Create Work Order Component

Grants the ability to create a Work Order record by selecting the action on a Component record.

Create Work Order Asset
Grants the ability to create a Work Order record by selecting the action on an Asset record.

Reconcile CU
Grants the ability to adjust actual quantities of contractor supplied compatible units from the CU Worksheet. The Work Order Task record must be in Finished status for this action to be available.

Repair Removed Part
Grants the ability to use the Repair Removed Part action from the Work Order Task module Actions list to create a Material Disposition record.

Search Duplicate Permits
Grants access to the action which allows users to search for duplicate permits for Work Order records. This action is available wherever the "Create Permit" action is available.

Show CU Location
Allows users to access the CU Location and Location Worksheet views on Work Order Tasks. Users must also have the SHOW CU ON WO responsibility.

Show CU on WO
Grants the ability to use Compatible Units functionality on the Work Order Task by selecting CU Worksheet, Contractor Contributed and Item Worksheet from the Views list.

Update Benchmark Work Order
Grants access to the action which allows the user to update a Benchmark Work Order with information from a Work Order that was generated from a PM Master.

Update Process on Work Order
Users with this responsibility are able to change the Process ID on work orders.

WO Active to Planning
Grants the ability to change the status of a Work Order from ACTIVE to PLANNING.

WO Closed to Finished
Grants the ability to change the status of a work order from CLOSED to FINISHED.

WO Finished to Active
Grants the ability to change the status of a work order from FINISHED to ACTIVE.

WO Finished to Closed
Grants the ability to change the status of a work order from FINISHED to CLOSED.

WO to Active
Grants the ability to change the status of a work order to ACTIVE.

Work Type Update
Allows users to update the Work Order type for Work Orders types “R”, “E” and “U”. Updates are not allowed for “P” and “S” types.

Charts

S_CHT123 - Actual Cost to Planning Estimate

Shows percent accuracy of closed work orders’ actual and revised estimate against actual costs. The time basis and time units defined in the Charts and Metrics Settings Business Rule under the WO Actual Cost to Planning Est. rule key.

S_CHT124 - Corrective vs. Preventive Work Orders

A comparison of Corrective Work Orders to Preventive Work Orders for the current year and the previous year. The data can be filtered further by Plant, Department and Area. Other filtering options, including Department, Area and Asset, are available in the Chart Field List.

S_CHT145 - Emergency Work Orders

The number of Emergency Work Orders created during the current and previous year. Emergency Work Orders have a type "E" The data can be filtered further by Plant. Other filtering options, including Department, Area and Asset, are available in the Chart Field List.

S_CHT122 - Planning Accuracy

Shows closed work orders that have actual costs compared to original and revised estimates that fall within a set variance. The variance, time basis, and time units defined in the Charts and Metrics Settings Business Rule under the WO Planning Accuracy Index rule key.

S_CHT146 - Preventive Maintenance Investment

The actual amount spent on Preventive Maintenance compared to the total amount spent on maintenance for the current and previous year. The data can be filtered further by Plant. Other filtering options, including Department, Area and Asset, are available in the Chart Field List.

S_CHT151 - Work Order Aging

The number of days Active Work Orders have been open. The number of days is grouped into Intervals such as "0 to 2 Days", "3 to 6 Days", etc. The data can be filtered further by Plant, Work Type, Crew, and Criticality. Other filtering options, such as Department and Area, are available in the Chart Field List.

Metrics

S_MTRC5 - Percent Preventive Work - sdbp_metric_pct_pm_wos

This metric is to describe the relationship between the number of PM Work Orders and the total number of Work Orders as a percentage. A PM Work Order is a Work Order with work type "P". It provides a means to monitor and improve the ratio of the number of PM Work Orders versus the total number of Work Orders.

S_MTRC10 - Percent PM Investment - sdbp_metric_pct_pm_investment

This metric is to describe the relationship between the PM Work Order dollars and the total dollars of all Work Orders as a percentage. A PM Work Order is a Work Order with work type "P". It provides a means to monitor the dollar amount being invested in preventive maintenance versus the total dollar amount used for maintenance.

S_MTRC7 - Percent Emergency Work - sdbp_metric_pct_emergency_wos

This metric is to describe the relationship between the number of Emergency Work Orders and the total number of Work Order as a percentage. An emergency Work Order is a Work Order with work type "E". It provides a means to monitor and improve the ratio of the number of Emergency Work Orders versus the total number of Work Orders

Reports

S_RPT046 - Work Order Aging Report

Lists active work orders and the number of days the work order has been backlogged. The date that the work order was activated is subtracted from the current date to determine the number of backlog days.

S_RPT091 - Historic Cost Performance by Asset Report

Lists assets and work orders and their associated Labor and Material costs.

S_RPT078 - Holiday Overtime Standing Report

Provides a listing of Employees for holiday call-in overtime.

S_RPT026 - Inventory Picklist Report

Lists stock items to be issued from the storeroom. This report can be used to provide storeroom personnel a means to prepare stock for pickup or delivery. It can be built by either planning stock items on a work order before the work order is activated or by creating a checkout request.

Note: S_RPT026B is the bar code font version of this report.

S_RPT048 - Work Order (Condensed) Report

This report is a condensed Work Order report, returning all tasks for the Work Order.

S_RPT071 - Work Order Forecast Report

Lists scheduled work orders and craft hours needed by crew. The values shown in the Craft fields (Tech, Carp, Mech) are defined in the S_RPT071 Crew Crafts Columns Business Rule.

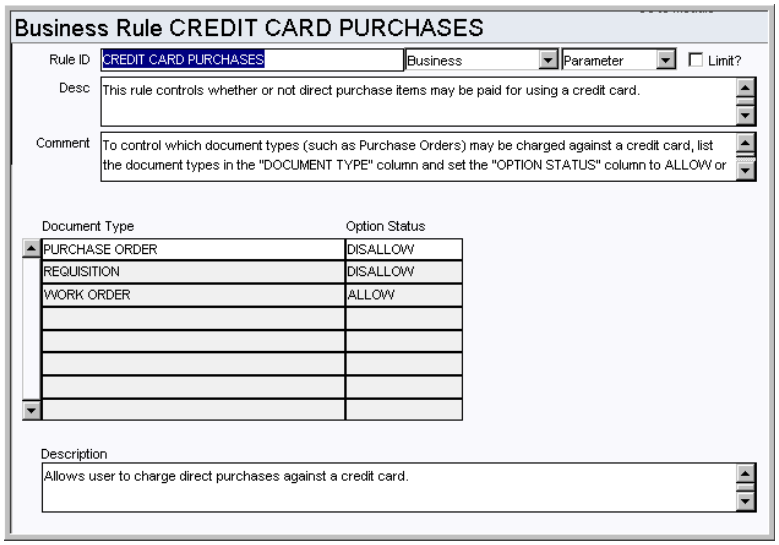
S_RPT044 - Work Order Package Report

A complete work order package that can be given to the person performing the work. Space is available for written comments to be entered later as closeout information.

Work Order Task Module

Business Rules

Credit Card Purchases Rule



Business Rule CREDIT CARD PURCHASES

Rule ID: CREDIT CARD PURCHASES | Business | Parameter | ☐ Limit?

Desc: This rule controls whether or not direct purchase items may be paid for using a credit card.

Comment: To control which document types (such as Purchase Orders) may be charged against a credit card, list the document types in the "DOCUMENT TYPE" column and set the "OPTION STATUS" column to ALLOW or

Document Type	Option Status
PURCHASE ORDER	DISALLOW
REQUISITION	DISALLOW
WORK ORDER	ALLOW

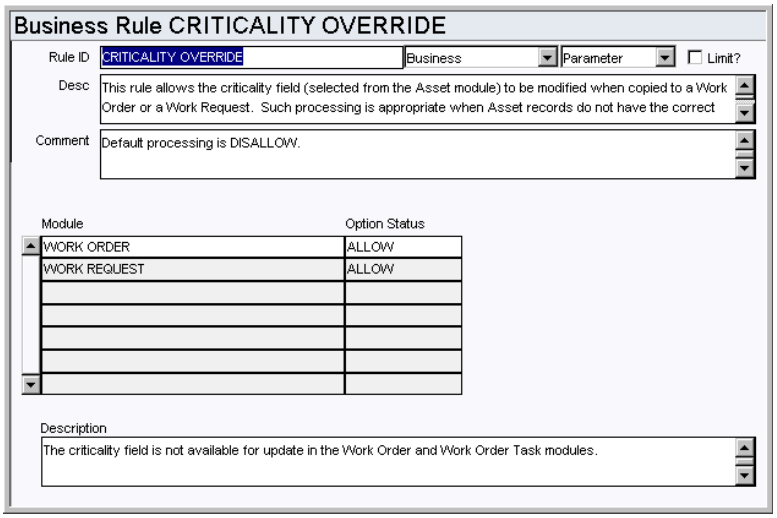
Description: Allows user to charge direct purchases against a credit card.

Control which types of documents are valid for direct purchase items to be paid for using a credit card. Direct Purchase items can be paid for using a credit card number (associated with an Employee record) as the charge number.

Document Type and Option Status

PURCHASE ORDER, REQUISITION, WORK ORDER - Allows or prevents users from charging direct purchases against a credit card. Enter ALLOW to enable charging of direct purchases to credit card numbers or DISALLOW to prevent it for each document type.

Criticality Override Rule



Business Rule CRITICALITY OVERRIDE

Rule ID: CRITICALITY OVERRIDE | Business | Parameter | ☐ Limit?

Desc: This rule allows the criticality field (selected from the Asset module) to be modified when copied to a Work Order or a Work Request. Such processing is appropriate when Asset records do not have the correct

Comment: Default processing is DISALLOW.

Module	Option Status
WORK ORDER	ALLOW
WORK REQUEST	ALLOW

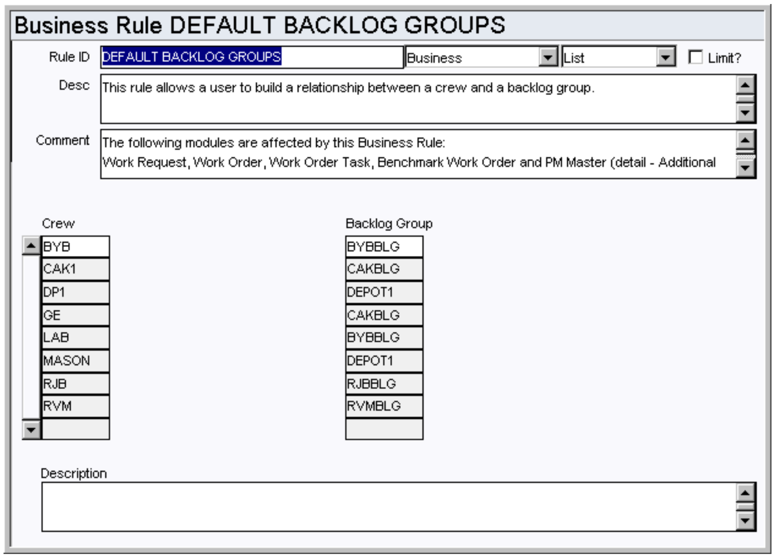
Description: The criticality field is not available for update in the Work Order and Work Order Task modules.

Control modification of the Criticality field on Work Orders and Work Request records. The Criticality field is copied onto work records when an asset is referenced. Set the option status to Allow or Disallow to control whether or not the field can be modified.

Allowing modification is appropriate if your asset records generally have no criticality or an incorrect ciriticality assigned to them.

The Criticality field is the first Priority field on work records. Default processing for this rule is DISALLOW.

Default Backlog Groups Rule



Business Rule DEFAULT BACKLOG GROUPS

Rule ID: DEFAULT BACKLOG GROUPS | Business | List | ☐ Limit?

Desc: This rule allows a user to build a relationship between a crew and a backlog group.

Comment: The following modules are affected by this Business Rule:
Work Request, Work Order, Work Order Task, Benchmark Work Order and PM Master (detail - Additional

Crew	Backlog Group
BYB	BYBBLG
CAK1	CAKBLG
DP1	DEPOT1
GE	CAKBLG
LAB	BYBBLG
MASON	DEPOT1
RJB	RJBBLG
RVM	RVMBLG

Description

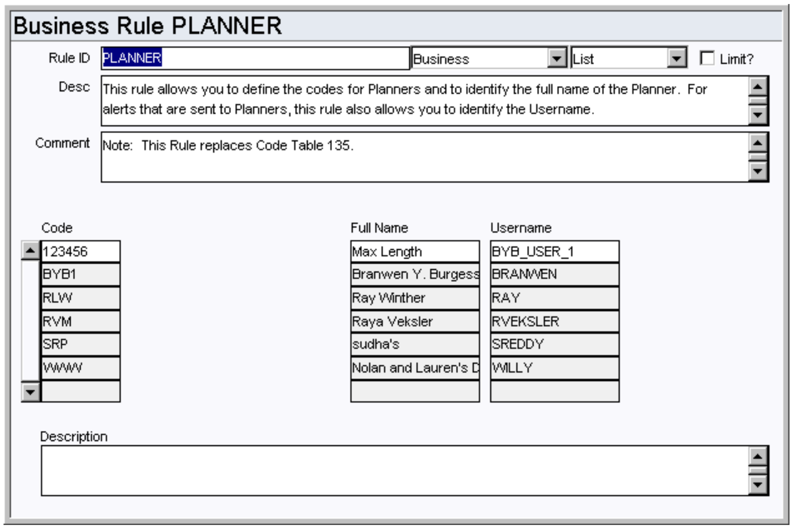
Build a relationship between crews and backlog groups for Work Requests, Work Order Tasks, Benchmark Work Order Tasks, PM Masters, and on schedules.

An example of how the concept of a backlog crew may be used is that Crew A (Crew) works 1st shift and Crew B (Backlog Group) works 2nd or 3rd shift and takes on any unfinished tasks originally scheduled for Crew A (Crew) on 1st shift.

Crew and Backlog Group

Enter the crews and the associated backlog groups for each in the appropriate columns.

Planner Rule



Business Rule PLANNER

Rule ID: PLANNER | Business | List | ☐ Limit?

Desc: This rule allows you to define the codes for Planners and to identify the full name of the Planner. For alerts that are sent to Planners, this rule also allows you to identify the Username.

Comment: Note: This Rule replaces Code Table 135.

Code	Full Name	Username
123456	Max Length	BYB_USER_1
BYB1	Branwen Y. Burgess	BRANWEN
RLW	Ray Winther	RAY
RVM	Raya Veksler	RVEKSLER
SRP	sudha's	SREDDY
WWW	Nolan and Lauren's D	WILLY

Description

Define planner codes, and identify the full names and usernames associated to each code.

These codes are used when identifying a planner on work records.

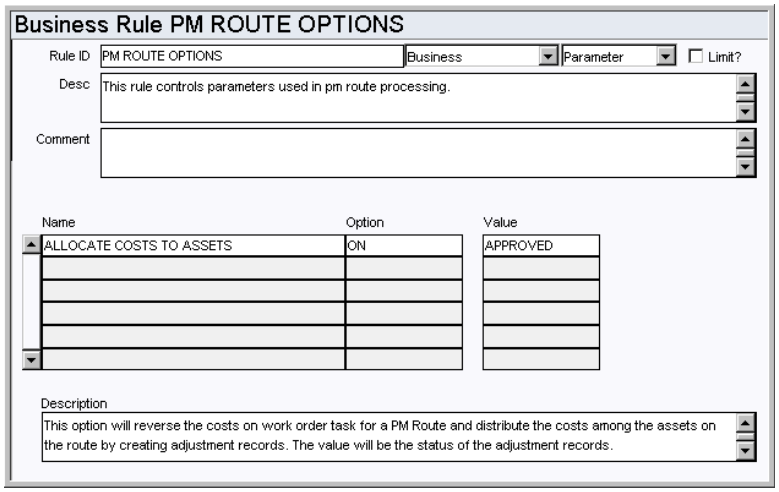
The user associated with the code receives an alert when an event occurs where an alert would be sent to the planner. For example, when a planner plans parts against a work order and needs to be notified when the parts have arrived. This does not mean that the system is configured to send alerts regarding any record where a planner is indicated.

Code
Enter the codes for planners in the Code column. Each code must be unique.

Full Name
Enter the full name of the person associated with the code. A person can be listed on more than one code.

Username
Enter the username of the person associated with the code. Since a person can be listed on more than one code, the username can be listed more than once as well.

PM Route Options Rule



Business Rule PM ROUTE OPTIONS

Rule ID: PM ROUTE OPTIONS | Business | Parameter | ☐ Limit?

Desc: This rule controls parameters used in pm route processing.

Comment:

Name	Option	Value
ALLOCATE COSTS TO ASSETS	ON	APPROVED

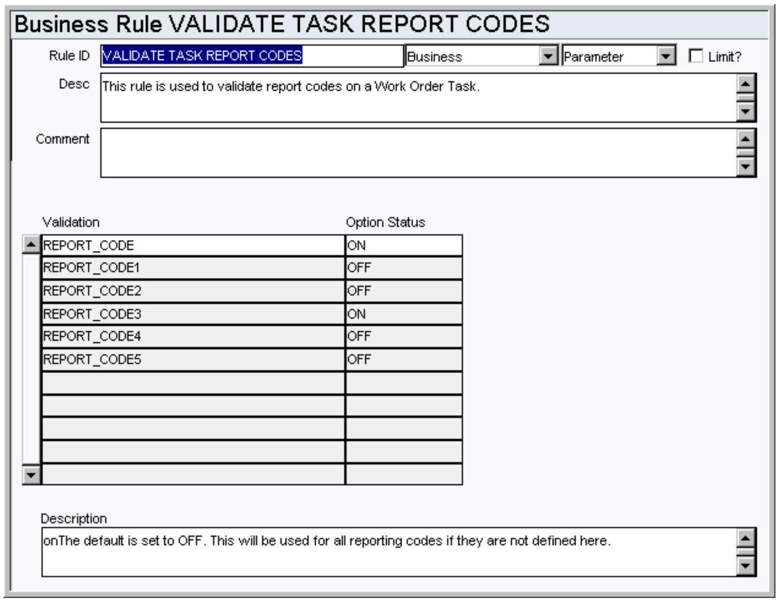
Description: This option will reverse the costs on work order task for a PM Route and distribute the costs among the assets on the route by creating adjustment records. The value will be the status of the adjustment records.

Control parameters used in PM Route processing.

Name, Option, and Value
ALLOCATE COSTS TO ASSETS - If you set the Allocate Costs to Assets rule key to ON, the system will manage the costs for a work order task on a PM Route so that the costs are evenly distributed among the assets on the route. The system completes this re-distribution of costs by creating cost adjustment records.

The value is the status that the adjustment records will be created in.

Validate Task Report Codes Rule



Business Rule VALIDATE TASK REPORT CODES

Rule ID: VALIDATE TASK REPORT CODES | Business | Parameter | ☐ Limit?

Desc: This rule is used to validate report codes on a Work Order Task.

Comment:

Validation	Option Status
REPORT_CODE	ON
REPORT_CODE1	OFF
REPORT_CODE2	OFF
REPORT_CODE3	ON
REPORT_CODE4	OFF
REPORT_CODE5	OFF

Description: onThe default is set to OFF. This will be used for all reporting codes if they are not defined here.

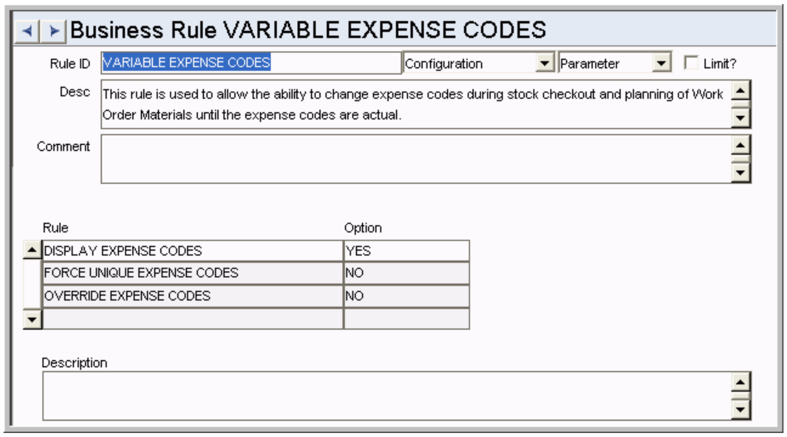
Establish which report codes should be validated work order tasks.

Validation and Option Status

Work order task records include five report code fields. If the Option Status is set to OFF in this Business Rule these fields are essentially free form. If the Option Status is set to OFF the system limits entry of Report Codes to the codes available on the Lists of Values. These lists are controlled by Code Tables 281-285.

Any report codes that are not defined here are defaulted to OFF.

Variable Expense Codes Rule



Business Rule VARIABLE EXPENSE CODES

Rule ID: VARIABLE EXPENSE CODES | Configuration | Parameter | ☐ Limit?

Desc: This rule is used to allow the ability to change expense codes during stock checkout and planning of Work Order Materials until the expense codes are actual.

Comment:

Rule	Option
DISPLAY EXPENSE CODES	YES
FORCE UNIQUE EXPENSE CODES	NO
OVERRIDE EXPENSE CODES	NO

Description:

This rule determines how expense codes are handled during stock checkout, checkout request, planning work order task materials and labor, and in the Timekeeping module. Regardless of the settings in this rule, any desired changes to expense codes can only be made before costs are actualized. Once actual costs are applied, the expense code on the record cannot be changed.

Rule and Option

DISPLAY EXPENSE CODES - If you enter YES as the option, the system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense

Code field on the Issue Ticket for stock checkouts based on Work Orders. Enter NO and the field is not displayed.

FORCE UNIQUE EXPENSE CODES - If you enter YES for this option, work order time charges for the same craft must have the same expense codes. The default setting is YES.

OVERRIDE EXPENSE CODES - Enter YES or NO in the OPTION column to allow or disallow users to change expense codes on timesheets, issue tickets for stock checkout, stock checkout requests, and material and labor detail records on work order tasks.

Entering YES in the OPTION column has the following implications:

- Materials planners will be able to overwrite the default expense codes for the Materials view of the Work Order module in the Maintenance subsystem. The system defaults this information from expense code associated with the Stock Code and Storeroom.
- Employees responsible for creating Issue tickets for stock item checkouts will be able to change the associated Expense code.
- The system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for sock checkouts based on Work Orders. This includes expense codes that have been provided by planners.
- Labor planners will be able to overwrite the default expense codes for Regular and Premium labor on Work Order Tasks. The system defaults this information from the Craft associated with the Work Order Task.
- Workers who enter their own time into the Timekeeping module of the Maintenance subsystem, will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners.
- Supervisors who review timesheets will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners and/or changed by employees on their timesheets.

Combining the Rules:

To keep anyone from changing expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = NO

To allow only Planners to use variable expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = YES

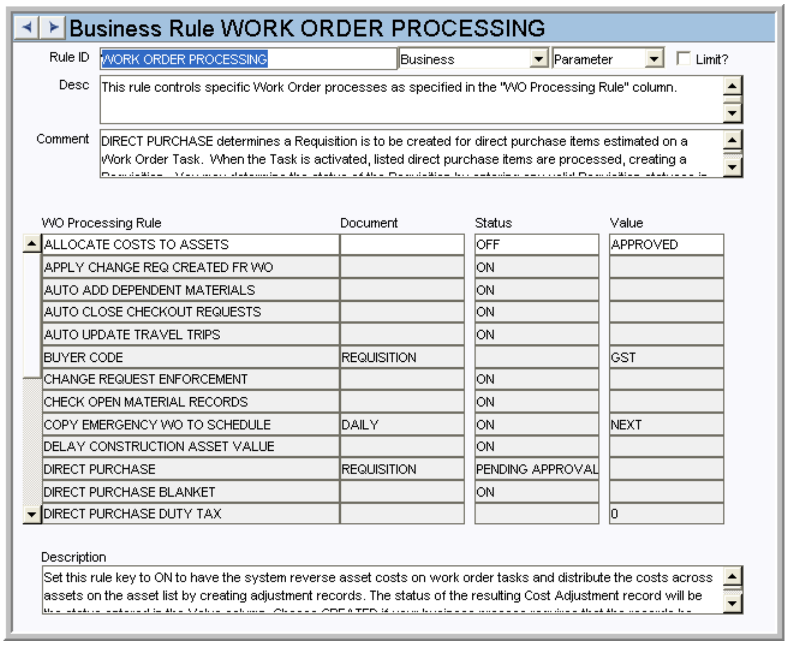
To allow charges for the same craft to use different expense codes:

Display Expense Codes = YES

Force Unique Expense Codes = NO

Override Expense Codes = YES

Work Order Processing Rule



Rule ID: WORK ORDER PROCESSING | Business | Parameter | ☐ Limit?

Desc: This rule controls specific Work Order processes as specified in the "WO Processing Rule" column.

Comment: DIRECT PURCHASE determines a Requisition is to be created for direct purchase items estimated on a Work Order Task. When the Task is activated, listed direct purchase items are processed, creating a

WO Processing Rule	Document	Status	Value
ALLOCATE COSTS TO ASSETS		OFF	APPROVED
APPLY CHANGE REQ CREATED FR WO		ON	
AUTO ADD DEPENDENT MATERIALS		ON	
AUTO CLOSE CHECKOUT REQUESTS		ON	
AUTO UPDATE TRAVEL TRIPS		ON	
BUYER CODE	REQUISITION		GST
CHANGE REQUEST ENFORCEMENT		ON	
CHECK OPEN MATERIAL RECORDS		ON	
COPY EMERGENCY WO TO SCHEDULE	DAILY	ON	NEXT
DELAY CONSTRUCTION ASSET VALUE		ON	
DIRECT PURCHASE	REQUISITION	PENDING APPROVAL	
DIRECT PURCHASE BLANKET		ON	
DIRECT PURCHASE DUTY TAX			0

Description: Set this rule key to ON to have the system reverse asset costs on work order tasks and distribute the costs across assets on the asset list by creating adjustment records. The status of the resulting Cost Adjustment record will be

Control work order processes.

WO Processing Rule, Document, Status and Value

ALLOCATE COSTS TO ASSET - Set this rule key to ON to have the system reverse asset costs on work order tasks and distribute the costs across assets on the asset list by creating adjustment records. The status of the resulting Cost Adjustment record will be the status entered in the Value column. Choose CREATED if you business process requires that the records be reviewed before they are approved and processed. Choose APPROVED status if the cost adjustments can be created and approved without review. If this rule key is set to OFF, costs are not allocated across the assets.

ALLOW NULL ASSET ID - Indicates whether or not a work order that includes construction assets can be set to Closed status without entering an Asset ID in the Work Order Task Construction Asset view. The default setting is OFF.

This applies to Construction Asset records on Work Order Task records with the Action of RETIRE or INSTALL.

With this rule key set to ON, an Asset ID is not required for construction assets with the Retire or Install action, and the asset valuation process occurs the first time SDBP_WORK_ORDER.FIXED_ASSET is run after the work order is set to Closed status. Please note that with this setting, Change Requests cannot be created for the construction assets, so the APPLY CHANGE REQ CREATED FR WO rule key should be set to OFF.

If the rule key is set to OFF, an Asset ID must be entered for construction assets with the Retire or Install action before the work order can be closed. With this setting, asset valuation processing is controlled by the DELAY CONSTRUCTION ASSET VALUE rule key.

It is also important to review your settings in the WO Aging business rule when using th functionality, regardless of whether this key is set to ON or OFF. Make sure that work orders are not sent to history before the valuation takes place. As an extreme example, you cannot have WO Aging set to 30 days with the fixed asset valuation set to run every 90 days. Once the work order is in history, the valuation will not take place.

APPLY CHANGE REQ CREATED FR WO - This rule key determines whether change requests for construction assets will be applied automatically when created from work orders. If the rule key status is set to ON, the system creates Change Request records based on entries made to the Construction Asset view on the Task and sets those Change Requests to 'Complete' status. The requested changes are automatically posted to the assets. If the rule key status is set to OFF the Change Requests are created and set to 'Created' status so that they must be reviewed before any change is made to the assets. Whether the rule key setting is YES or NO, the 'sdbp_create_change_req.create_chaange_from_wo' batch process is triggered once the Task status is set to 'Finished' and the Work Order status is set to 'Closed'.

ADD ACTIVE TASK TO WORK ORDER - If this option is set to ON, new tasks are added to Active Work Orders in Active status. If this option is set to OFF, all new Tasks are inserted in Planning status and the Work Order header status is automatically reset to Planning status when the first new Task is added.

The Work Order Processing Rule controls the processes specified in the Work Order Processing Rule column.

AUTO ADD DEPENDENT MATERIALS - When the Status setting is OFF (default), Compatible Unit Dependent Material is not automatically added to the Task Items Worksheet. When the setting is ON, the Dependent Material on Compatible Units is automatically added to the Items Worksheet.

AUTO CLOSE CHECKOUT REQUESTS - When this rule key is ON and a Work Order Task is set to Finished status, all Checkout Requests for the Work Order/Task in Created and Active status are set to Closed status. This releases any demand that was placed on the Storeroom in association to the request.

AUTO UPDATE TRAVEL TRIPS - When this key is ON, the Number of Trips for Travel Time is automatically updated based on labor requirement durations whenever a task, labor requirement or an 'L' type task item worksheet record is inserted or updated.

BUYER CODE - This determines if a buyer code is to be added to the direct purchase requisition if there is no buyer code in the material record. Select from the list of values in the Value column the buyer code to use. The document name REQUISITION must be entered in the Document column.

CHANGE REQUEST ENFORCEMENT - If the value in the Status field is set to ON, the Work Order record status cannot be changed to ACTIVE unless an approved Change Request is attached to the task(s) that have change requests required. The Document and Value fields are left blank for this rule key.

CHECK OPEN MATERIAL RECORDS - If the value in the Status field is set to ON, the system looks for unresolved material records when a Work Order Task record is set to Finished Status. If there are unresolved material items, the system displays a warning message. Users can then click the “Details” button to view a list of the unresolved documents. From the list, users can drill-down on the Document ID to open the record (all except Material type since it is on the task material). The Default value for this rule key is OFF. The Document and Value fields are left blank for this rule key.

Unresolved material records could be open requisitions, purchase orders, request for quotes, material dispositions, checkout requests, or storeroom demand set from task materials.

COPY EMERGENCY WO TO SCHEDULE - This rule key determines whether or not emergency work orders are copied to a schedule when they are created. It also determines whether the work order is copied to a daily or workweek schedule.

If the Status field is set to ON, emergency work orders will be copied to a schedule. Set the Document field to either Daily or Workweek to indicate the type of schedule to copy to. Set the Value field to one of the following four options:

Current - Emergency work orders are copied to the current schedule.

Next - Emergency work orders are copied to the next available schedule.

Auto - Emergency work orders are copied to a schedule determined by the crew hours / workweek. If the current time falls within the current schedule (daily or workweek as appropriate) the work order will copy to the current schedule. If the current time falls outside of the current schedule, the work order will copy to the next available schedule.

Manual - User enters the schedule date the work order copies to.

DELAY CONSTRUCTION ASSET VALUE - If this rule key is set to ON, construction assets are not valued until after SDBP_YEAR_END_OH_COST_DIST (indirect overhead) is run based on the schedule established in the Regulatory Account Options Business rule. If it is set to OFF, construction assets are valued the first time SDBP_WORK_ORDER.FIXED_ASSET is run after the work order is set to Closed status. This rule key is only functional if the ALLOW NULL ASSET ID rule key is set to OFF.

DIRECT PURCHASE - This rule key sets the type of purchasing record that should be created for Direct Purchase items on a work order task. When the task is activated the system will create a Requisition for the Direct Purchase items. Determine the status that the Requisition is created in by entering Approved or Created in the Status field. The PO CREATED status can only be used with interfaces. The Value field is left blank for this rule key.

DIRECT PURCHASE BLANKET - If the value in the Status field is set to ON, the system performs the following processing:

When a user planning materials for a Work Order Task (Work Order Task Material and Service Requirement detail) selects a Direct-type stock item and saves the Task record, the system will check for Blanket Contracts that include the item. If it finds one or more contracts, the system requires completion of the Blanket Contract field. If the item is listed on only one active contract, the system will supply the contract's number. If more than one contract might apply, the system opens the list of values so that the user can select the appropriate contract.

When the Work Order status is set to Active, the system first checks Allow Automatic Work Order Release? check box the Blanket Contract record. If the check box is not checked, the system will create a Requisition.

If the Allow Automatic Work Order Release? check box is marked, the system will check the Blanket Contract Limit. If the purchases will exceed the contract limit, the system creates a Purchase Order in Created status.

If the Blanket Contract Limit Amount will not be exceeded, the system next checks the User Limit on the Access List view to the Blanket Contract (in the Purchasing subsystem). If this will be exceeded, the system creates a Purchase Order in Created status. If the limit will not be exceeded, the system creates the Purchase Order in Issued status.

DIRECT PURCHASE FEDERAL TAX - The number entered in the Value field is used as the default Federal Tax Code on work orders. The Document and Status fields are left blank for this rule key.

DIRECT PURCHASE STATE TAX - The number entered in the Value field is used as the default State Tax Code on work orders. The Document and Status fields are left blank for this rule key.

DIRECT PURCHASE DUTY TAX - The number entered in the Value field is used as the default Duty Tax Code on work orders. The Document and Status fields are left blank for this rule key.

EXPENSE CODE UPDATE - This determines if users can update expense codes on the Work Order Task Material screen for direct items with or without stock codes. Enter ALLOW or DISALLOW in the Document field. The Status and Value fields are left blank for this rule key.

LABOR MARKUP ON COST SUMMARY - This key determines if labor markup transactions are included in the Cost Summary views in the Work Order and Project / Subproject modules. Set the value to ON to include the M1, M2 and M3 Labor Markup Transaction Codes in the Cost Summary views. Set the value to OFF if you do not want to include the labor markup values. The default setting is OFF.

PERMIT TEXT - If the value in the Status field is set to ON, then red text will appear on the Work Order or Task record when there are associated permits. The Document and Value fields are left blank for this rule key.

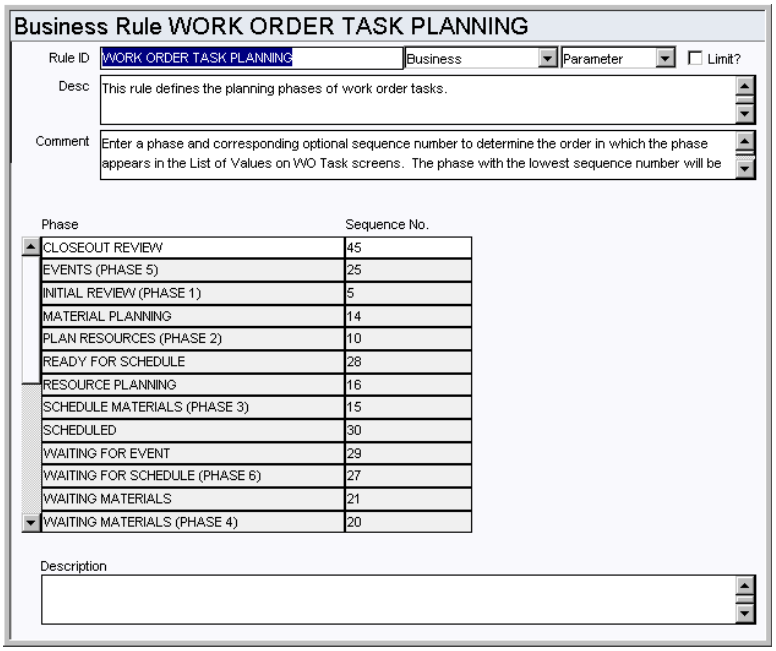
REAPPROVE WORK ORDER - If this rule key value is set to ON and a new work order task is added to an Approved or Active Work Order record, the system changes the status back to Planning and the newly added task is placed in Planning status as well. The work order must be routed to have the new task approved. This allows new tasks to be added when the work order is in Pending Approval, Approved or Active status.

USE ESTIMATE AS MATERIAL REQUIRED DATE - When this key value is set to OFF the Material Required Date is not auto-populated. When the setting is ON, the Material Required Date for Stock-coded items is defaulted to the Estimated Delivery Date when the Material Record is created and then is updated when the Material Record is activated.

UPDATE CLOSED WORK ORDERS - When this rule key is set to ON, users can update information on closed work records in any views other than the Approvals view, the Task's Regulatory Accounting (Including Costs section), or any of the CU views. If the rule key is set to OFF no fields or views are updatable on the record.

UPDATE FROM BENCHMARK - When this rule key is set to OFF the Created By and Created Date fields are retained from the original Benchmark if a work order or task is created from a Benchmark. If the value is set to ON the system uses the system date and username of the person logged on to populate these fields.

Work Order Task Planning Rule



Business Rule WORK ORDER TASK PLANNING

Rule ID: WORK ORDER TASK PLANNING — Business — Parameter — ☐ Limit?

Desc: This rule defines the planning phases of work order tasks.

Comment: Enter a phase and corresponding optional sequence number to determine the order in which the phase appears in the List of Values on WO Task screens. The phase with the lowest sequence number will be

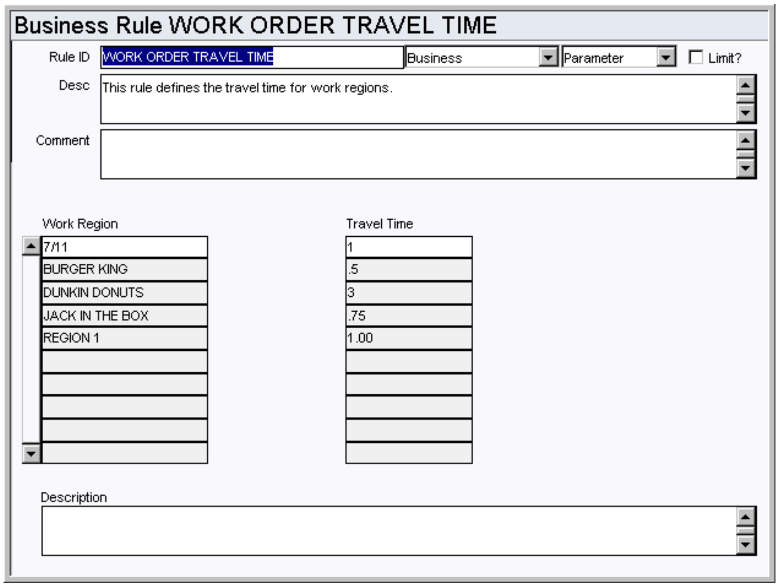
Phase	Sequence No.
CLOSEOUT REVIEW	45
EVENTS (PHASE 5)	25
INITIAL REVIEW (PHASE 1)	5
MATERIAL PLANNING	14
PLAN RESOURCES (PHASE 2)	10
READY FOR SCHEDULE	28
RESOURCE PLANNING	16
SCHEDULE MATERIALS (PHASE 3)	15
SCHEDULED	30
WAITING FOR EVENT	29
WAITING FOR SCHEDULE (PHASE 6)	27
WAITING MATERIALS	21
WAITING MATERIALS (PHASE 4)	20

Description

Defines the planning phases of work order tasks.

Enter a phase and corresponding optional sequence number to determine the order in which the phase appears in the List of Values on Work Order Task screens. The phase with the lowest sequence number will be the default phase when new Work Order Task records are created.

Work Order Travel Time Rule



Business Rule WORK ORDER TRAVEL TIME

Rule ID: WORK ORDER TRAVEL TIME — Business — Parameter — ☐ Limit?

Desc: This rule defines the travel time for work regions.

Comment

Work Region	Travel Time
7/11	1
BURGER KING	.5
DUNKIN DONUTS	3
JACK IN THE BOX	.75
REGION 1	1.00

Description

Define travel times by region for work order tasks.

Code Tables

Code Table 12: Shop Codes

Shop field - Define codes to identify your organizations repair facilities. Since this field is included on the Search Options screen it can be used to search for vehicles being repaired.

Code Table 41: Work Priority

Priority field (second field) - Define codes that indicate the relative work or safety impact of the work that is to be done. This information is later used by the system to calculate the overall priority of work orders.

By default the system contains entries for Code Table 41. The user has the ability to alter the data in this Code Table, however we recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of Priority.

Code Table 107: Units

Meter field - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Code Table 190: Job Codes

Job field - Define codes to identify standard repairs. Typical entries are job codes for performing an oil change, rotating tires, replacing a fuel filter, and replacing an oil filter. The code table for the Reason field is linked to code table 190.

Code Tables 281 - 285: Report Codes 1-5

The Lists of Values for Work Order Task Report Codes reference Code Tables 281-285. Enter Code names, and code descriptions that can serve as a method of categorizing work order tasks for reporting purposes.

Code Table 660: Vehicle Reason for Repair

Reason field - Define codes for the reason to perform maintenance. This code table can be used as the linked code for code table 190, however any available code table can be used as well.

Code Table 661: Vehicle Action Taken

Action field - Define codes for the action that needs to be taken to perform maintenance on the asset.

Code Table 662: Vehicle System Codes

Vehicle Codes fields - Define VMRS (Vehicle Maintenance Reporting Standard) system codes. The first field represents "system" the second represents "assembly," and the third represents "component." The Assembly and Component fields will require that you also configure code tables 1150 and 1151 and link them to code table 662.

Code Table 1194: MWM Order Type (Integration Only)

MWM Order Type field - Define order types for MWM Integration.

Work Order (Finishing Tasks)

When you set the status of a work order task to Finished, the system opens the Task Finishing Wizard to capture closeout information. The following code tables define fields in the wizard.

Code Table 9: Repair Codes (Length = 10)

Repair Code field - Define types of repair that may be done. Possible Repair Codes may include Rebuild, Replace, Reqire, etc.

Code Table 10: Failure Codes (Length = 10)

Failure Code field - Define types of equipment failure that may occur. Typical Failure Codes may include Corrosion, Distortion, Erosion, etc.

Code Table 51: Failure Modes (Length = 10)

Failure Mode field - Define further codes to identify failures found while work was being performed. Failure Mode is defined as "any event which is likely to cause an asset (or system or process) to fail." Some examples would be: Deterioration, Lubrication Failure, Dirt or contamination, Disassembly, capability reducing' human error, deliberate overloading, unintentional overloading, incorrect process material, Initial incapability, etc.

Code Table 52: Root Cause Codes (Length = 10)

Root Failure Cause field - Define codes to further identify the base cause which created the failure. Some examples include: Stresses, degradation of insulation, lack of lubrication, breakdown of lubrication, Blocking, sticking, jamming, weld failure, solder failure, fatigue, corrosion, vibration, Anthropometric=cannot reach, human sensory=cannot see/smell/hear, physiological= hot/cold/loud/working too long and psychological=slip/lapse or mistake/violation. (ex: control valve left shut due to inability to get into tight space), Operator error, Under-designed, Operator error combined with under-designed, Out of specification, Desired performance is outside of assets capability, etc.

Code Table 189: Work Action Codes (Length = 8)

Further Action field - Define codes for further action required. Examples include Adjust, Align, etc.

Code Table 222: Component Category (Length = 10)

Component Code field - Define codes to identify which type of component the failure occurred on. This field can be used from the Search Options screen to narrow down searches. Component categories may include Bearings, Valves, Hose, etc.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Add Dependent Materials

Allows users to display a listing of dependent items associated with the CU highlighted on the CU Worksheet, and place a check in the Add box for items they want to include on the Items Worksheet.

Assign Contractor to CUs

Grants the ability to assign multiple compatible units to a single contractor in the CU Worksheet view of the Work Order Task module.

Cost and Closeout

Adds the Cost and Closeout action to the user's home page action list.

Create Checkout Request from WO

Grants the ability to create checkout requests by selecting an action on the Work Order Task record.

Repair Removed Part

Grants the ability to use the Repair Removed Part Action from the Work Order Task module Actions list to create a Material Disposition record.

Show CU Location

Allows users to access the CU Location and Location Worksheet views on Work Order Tasks. Users must also have the SHOW CU ON WO responsibility.

Show CU on WO

Grants the ability to use Compatible Units functionality on the Work Order Task by selecting CU Worksheet, Contractor Contributed and Item Worksheet from the Views list.

Update MWM

This function only applies to custom integration processing. Determines which users have the authority to send (create or update) work order information to MWM.

Update Reg Acct. Dist

Grants access to an action that allows the user to update override percentages on the Work Order Task module Regulatory Accounting view.

Value Assets in Prior Year

Grants the ability to execute the Value Assets in Prior Year action from the Work Order Task Construction Assets view. This action becomes available when the work order is in Finished status. If you select this action from the actions list and the fixed asset batch job (sdbp_work_order.fixed_asset) runs, the system retrieves the accounting period based on the closed date on the work order. The year where the closed date falls is lessened by one (to derive the prior year), and this year is then used to determine which year to distribute direct and indirect overhead costs.

WO Task to Active

Grants the ability to change the status of a work order task to ACTIVE.

Reports

S_RPT056 - Work Order Task Aging Report

Lists active work orders & tasks and the number of days the work order task has been backlogged. The date that the work order was activated is subtracted from the current date to determine the number of backlog days.

S_RPT041 - Daily Schedule Report

Lists the work order tasks scheduled for a selected day.

S_RPT040 - Workweek Schedule Report

Lists the work order tasks scheduled for a selected week.

S_RPT045 - Work Order Backlog Report

Summarizes active work order task information.

S_RPT055 - Work Order Backlog Detail Report

A detailed summary of active work order task information.

S_RPT043 - Work Order Tasks Delayed by Materials Report

Summarizes work order tasks and materials information for work orders requiring stock (parts) currently not available in the storeroom.

Batch Processes

Cost Asset - sdbp_cost_asset;

Allocates costs to assets indicated on the Asset list in the Work Order Task module by creating cost adjustment records and posting accordingly. This functionality is only applicable when the Allocate Costs to Asset option in the Work Order Processing business rule is set to ON. You must either set the job run option to YES in the Batch Job Control business rule or set up an individual batch schedule for it to run automatically. The cost adjustment is not created until the work order is in closed status, so this should run after the close work order process. Please refer to the instructions under the Job Manager module for more information.

Cost Adjustment for PM Route - sdbp_cost_route.cost_route;

Generates and posts cost adjustments to remove charges from the work order task account and distribute them among the PM Route's assets. Labor and material costs related to accomplishing the scheduled PM Route are charged against the work order's task and then distributed amongst the assets that were finished on the PM Route.

Cost and Closeout - smu_interface.sdbp_mu_interface;
Processes transactions entered in cost and closeout.

Cost Labor - sdbp_cost_labor.cost_labor;
Processes approved labor costs (from timesheets) that have not yet been posted. Costs are posted to the work order task as a Labor record. If a Labor Requirement record does not yet already exist for the task, the system inserts one, then posts the cost. Once a labor charge is successfully processed, it is marked as posted.

Create Change Request - sdbp_create_change_request.create_change_req_from_wo;
Creates change requests as a result of construction assets entered on work order tasks. Change requests are created based on the setting of the Apply Change Req Created Fr WO rule key in the Work Order Processing business rule. The change requests are created when the Work Order status is set to Finished.

Finish WO - sdbp_finish_wo;
Updates the work order header status to Finished if either all associated tasks are in Closed, Canceled, or Finished status, or if the work order has no associated tasks.

Held for Parts - sdbp_held_for_parts;
Reviews Work Order Task Parts Requirements vs. stock inventory and direct purchases for a task. If the On-Hand quantity in a storeroom is less than the amount required for an active task or if direct purchase items ordered for a task are still not received, the Held for Parts indicator on the task is checked. If all parts required (storeroom and direct purchase) are available, the Held for Parts indicator is unchecked.

Process Fixed Assets - sdbp_work_order.fixed_asset;
Processes actual amounts and allocation amounts for a work order task and applies them to the Regulatory Accounts associated to the compatible units on the task. Also determines the value of fixed assets associated to the capital regulatory accounts on the work order tasks. This procedure also includes the package that creates change requests for the creation or retirement of group assets on a work order task.

Process Service Timesheet - sdbp_process_service_timesheet.post_approved_time;
Processes approved labor costs (from service timesheets) that have not yet been posted. Costs are posted to the work order task as a Labor record. If a Labor Requirement record does not yet already exist for the task, the system inserts one, then posts the cost. Once a labor charge is successfully processed, it is marked as posted.

Reschedule - sdbp_reschedule.job_reschedule;
Reviews all active work order tasks which are unfinished and places them on the daily and / or weekly schedules as defined in the Auto Generate Daily Schedule and Auto Generate Weekly Schedule rules. Work orders that were generated by PM Master processing will also be placed on the appropriate schedule.

Reset Demand Quantity - sdbp_storeroom_demand;
Recalculates the On-Demand Quantity for parts within the storeroom. This procedure reviews all active work order tasks, summing the quantities required across tasks for stock items. Once recalculated, the On-Demand Quantity for each storeroom item is updated accordingly. Note that this batch procedure is not a required procedure since standard processing maintains the storeroom On-Demand Quantity. This serves as an extra level of assurance that the On-Demand Quantities are correct as of each nightly batch run. Note that running this process could potentially be time consuming if there is a large amount of data for the system to process.

Regulatory Account Cost - sdbp_regulatory_account_cost;
Posts costs associated to regulatory accounts.

Work Order Labor - sdbp_work_order_labor;
Processes changes made to work order task labor values.

Benchmark Work Order Module

The system allows for the creation of benchmark work orders. Rules and settings for benchmark work orders are the same as those for regular work orders. Please refer to the responsibilities for Benchmark specific roles and authorities.

Work Order Business Rules also affect benchmark work orders.

Fields

Sequence No.: Benchmark Work Order No.

The record number is comprised of a unique ID (Ex. “B000138”). Benchmark Work Order record numbers must be system generated. Manual creation of these record numbers could result in critical system errors when records are created from other records or in batch procedures.

> **TABLE NAME** - BENCHMARK - The database table that the sequence number is generated for.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Batch Processes

PM Cycle - sdbp_pm_cycle_job.start_job;

Reviews active PM Masters and cycles those that are due, creating work orders in the status defined in the PM Master Parameters business rule. If the PM is being cycled and the Benchmark’s component is no longer installed on the Benchmark’s asset, the system will generate a work order with the asset from the Benchmark and will not bring over the component.

Work Order Labor - sdbp_work_order_labor;

Processes changes made to Work Order Task labor values.

Copy Record

BENCHWO - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Work Order From Benchmark

Grants the ability to create a follow-up Work Order from a Benchmark Work Order record.

Crew Module

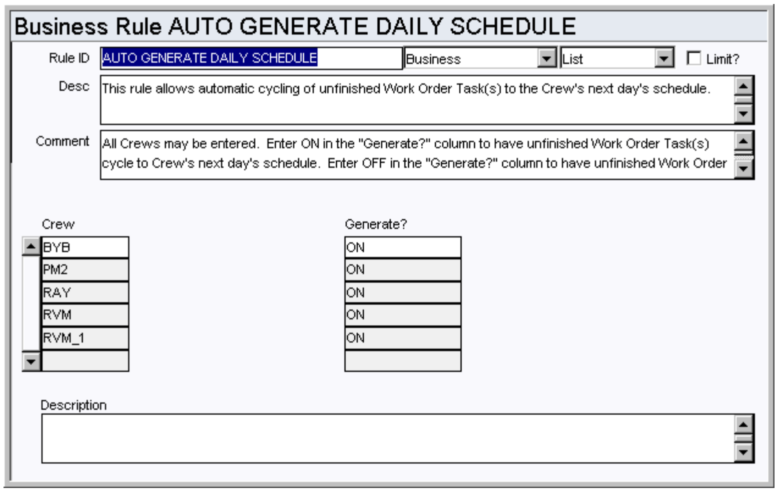
Fields

Crew Field

When new Crew records are created this field is used to define the name of the crew. This name or code will then be used on work records that reference the crew.

Business Rules

Auto Generate Daily Schedule Rule



Business Rule AUTO GENERATE DAILY SCHEDULE

Rule ID: AUTO GENERATE DAILY SCHEDULE | Business | List | ☐ Limit?

Desc: This rule allows automatic cycling of unfinished Work Order Task(s) to the Crew's next day's schedule.

Comment: All Crews may be entered. Enter ON in the "Generate?" column to have unfinished Work Order Task(s) cycle to Crew's next day's schedule. Enter OFF in the "Generate?" column to have unfinished Work Order

Crew	Generate?
BYB	ON
PM2	ON
RAY	ON
RVM	ON
RVM_1	ON

Description:

Control automatic cycling of unfinished work order tasks to the crew's next day's schedule.

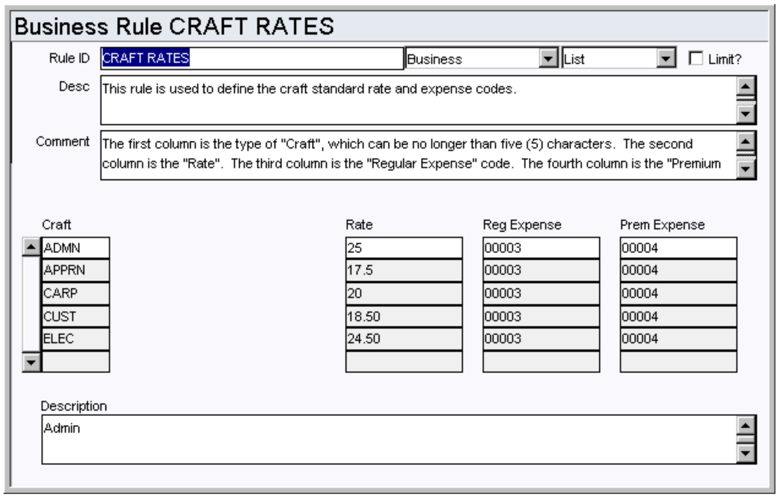
When the sdbp_reschedule.job_reschedule batck job is run, work order tasks that are in ACTIVE status are placed on the next day's schedule for that task's crew. Schedules are generated according to the days and hours entered in the Crew Daily Hours view of the Crew module.

Note: The Automatic Scheduling feature only applies to ACTIVE work order tasks. If you are using the Scheduling modules to schedule PLANNED (or non-active) work order tasks, you must manually move the work tasks to future schedules. This is due to the fact that the "completion" of a PLANNED work order task does not result in the work order task being FINISHED or CANCELED. The Automatic Scheduling option would continue to rollover the work order task to the Planners schedule until work was actually finished.

Crew / Generate

Enter any valid crew that exists in the Crew module then enter ON or OFF in the Generate column to determine whether or not the system should cycle unfinished work order tasks to the crew’s next day’s schedule. Any crew that is not listed will be defaulted to OFF and no schedules will be created automatically for that crew. Schedules are generated according to the days and hours entered in the Crew Daily Hours view of the Crew module.

Craft Rates Rule



Business Rule CRAFT RATES

Rule ID: CRAFT RATES | Business | List | ☐ Limit?

Desc: This rule is used to define the craft standard rate and expense codes.

Comment: The first column is the type of "Craft", which can be no longer than five (5) characters. The second column is the "Rate". The third column is the "Regular Expense" code. The fourth column is the "Premium

Craft	Rate	Reg Expense	Prem Expense
ADMN	25	00003	00004
APPRN	17.5	00003	00004
CARP	20	00003	00004
CUST	18.50	00003	00004
ELEC	24.50	00003	00004

Description: Admin

Define Craft codes along with associated wage rates and expense codes.

Craft
Classify job types in the Craft field. Examples are ENG for engineer or MECH for mechanic.

Rate
This parameter sets the wage rate for the Craft listed.

Reg Expense
This parameter sets the expense code that the system will charge the employee’s regular (i.e. non-premium) labor charges to.

Prem Expense
This parameter sets the expense code that the system will charge the employee’s premium (i.e. Overtime) labor charges to.

Code Tables

Code Table 310: Supervisor Title

Supervisor field - Define the supervisor titles to be used for various records. These codes define a supervisory position, not a specific person. Some examples of titles are Head Supervisor, Maintenance Supervisor, and Foreman.

Copy Record

CREWMOD - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reports

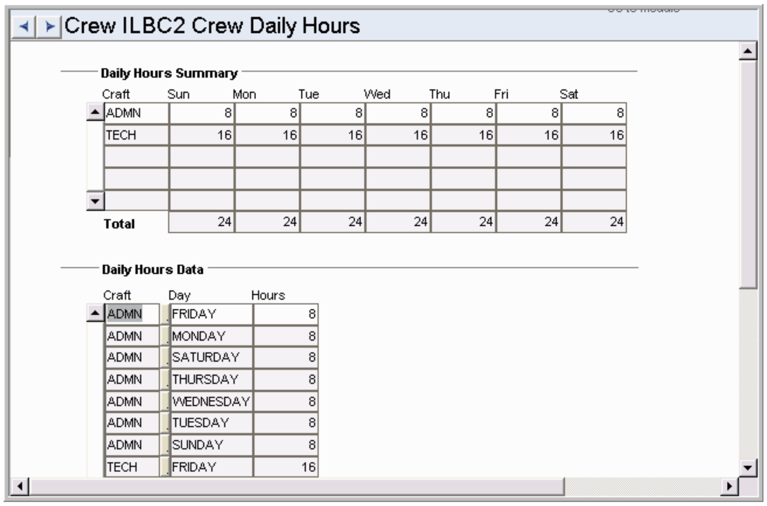
S_RPT079 - Overtime Standing Report by Crew

Lists overtime standing information for each crew.

Views

Crew Daily Hours

Define the crafts and number of hours that are available to each crew. This information is used in the Daily Schedule module to determine the resources available for scheduling.



Crew ILBC2 Crew Daily Hours

Daily Hours Summary

Craft	Sun	Mon	Tue	Wed	Thu	Fri	Sat
ADMN	8	8	8	8	8	8	8
TECH	16	16	16	16	16	16	16
Total	24	24	24	24	24	24	24

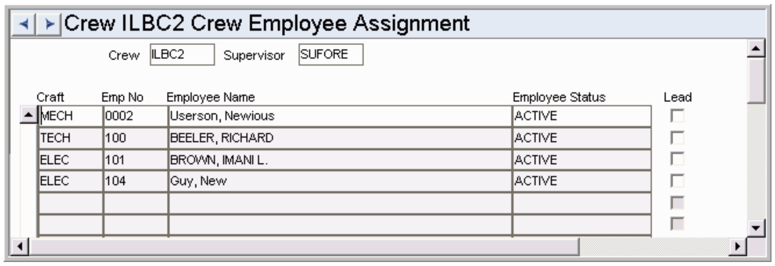
Daily Hours Data

Craft	Day	Hours
ADMN	FRIDAY	8
ADMN	MONDAY	8
ADMN	SATURDAY	8
ADMN	THURSDAY	8
ADMN	WEDNESDAY	8
ADMN	TUESDAY	8
ADMN	SUNDAY	8
TECH	FRIDAY	16

This view was added in release 6.5 to replace the Daily Hours rule key in the Schedule Labor Resources business rule.

Crew Employee Assignment

Assign Employees to the crew in the Crew Employee Assignment View.



Crew ILBC2 Crew Employee Assignment

Crew ILBC2 Supervisor SUFORE

Craft	Emp No	Employee Name	Employee Status	Lead
MECH	0002	Userson, Newious	ACTIVE	☐
TECH	100	BEELER, RICHARD	ACTIVE	☐
ELEC	101	BROWN, IMANI L.	ACTIVE	☐
ELEC	104	Guy, New	ACTIVE	☐
				☐
				☐

When an Employee Number is selected, the Craft Code and Employee Name are automatically populated from the Employee module of the Resource subsystem. Only employees in 'active' status can be assigned to a crew.

Crew Activity Log Module

Fields

Crew

This field can be used to create a new crew or reference a crew that already exists. Crews can be saved directly into the crew module from this screen.

Code Tables

Code Table 110: Backlog Groups

Backlog Group field - These groups can be used to group crews or to find and categorize work orders at a high level. This code table is used in the Process, Asset, Function, Work Request, Work Order, and Crew Activity Log modules.

Code Table 110 is used in the following modules: Process, Asset, Function, Work Request, Work Order, Crew Activity Log.

Code Table 120: Crew Event Types

Event Type field - Define codes to identify stages completed by a crew in the work process. Examples include Finish (indicates finished work on a work order task), Start (identifies a started task), etc. This code table is also used in the Work Order Activity Log.

Activity Tracking Module

Fields

Sequence No.: Tracking No.

The record number is comprised of a unique ID. Users typically have the system generate this number.

TABLE NAME - SA_ACTIVITY_TRACKING - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 13: Type of Activity

Activity field - Define task activity types. Types of work might include Mowing, Drilling, Digging, Resurfacing, etc.

Code Table 14: Type of Activity Units

Units field- Define work units. Types of Units might include Kilometers, Acres etc. depending on the types of work that are defined.

Copy Record

ACTTRACK - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Fleet Asset Module

Fields

Sequence No.: Vehicle ID

The Fleet Asset record number is comprised of a unique ID (Ex. “VHC-0002”). Vehicle ID numbers are typically system generated.

TABLE NAME - FLEET - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Class

The list of values for the Class field is controlled by the Asset Class module.

Specification (More Data View)

Specification codes are defined in the Specification module.

Operational ID (Fleet Operational/Maintenance View)

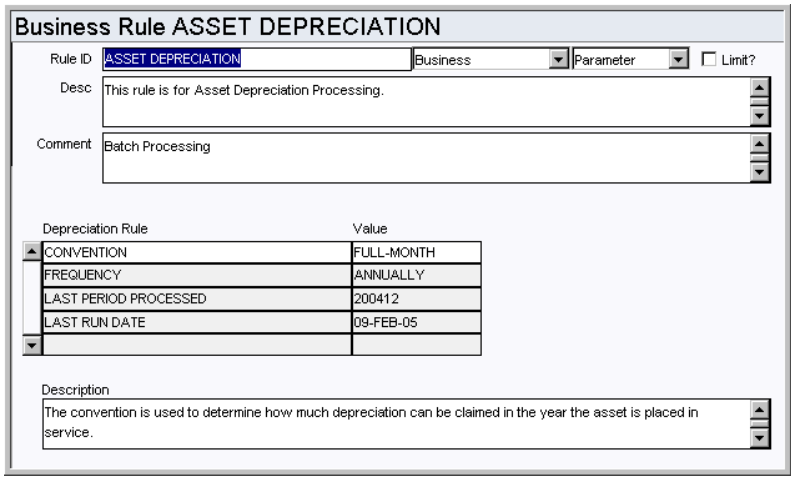
The list of values for the Operational ID field is comprised of values entered in the Operational Schedule module under Fleet in the Maintenance subsystem.

Maintenance Manager

The value entered in the Maintenance Manager field on the Asset header determines which Maintenance Manager will bear the costs associated with the asset when work is done. The field is controlled by a list of values the system builds using the Maintenance Manager module in the Resource subsystem.

Business Rules

Asset Depreciation Rule



Rule ID: ASSET DEPRECIATION

Business

Parameter

☐ Limit?

Desc: This rule is for Asset Depreciation Processing.

Comment: Batch Processing

Depreciation Rule	Value
CONVENTION	FULL-MONTH
FREQUENCY	ANNUALLY
LAST PERIOD PROCESSED	200412
LAST RUN DATE	09-FEB-05

Description: The convention is used to determine how much depreciation can be claimed in the year the asset is placed in service.

This rule determines how the system will process asset depreciation costs and post them to the account log.

Once the values for the Convention and Frequency rule keys are set and the depreciation batch job has run, the settings should not be changed. Any modification will result in irreversible errors in your depreciation calculations.

CONVENTION - Select Full-Month to indicate the amount of depreciation that can be claimed in the year the asset is placed in service. Full-Month is the only option.

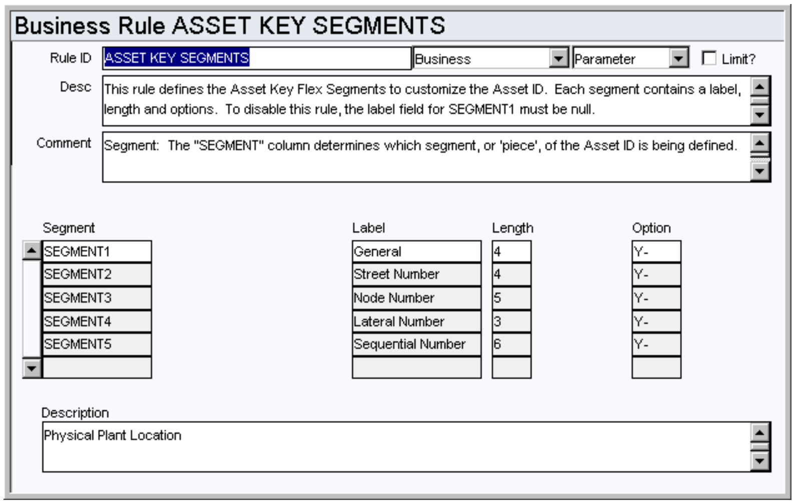
FREQUENCY - The value entered here determines how often all asset's depreciation will be written to the account log. For example, if the Last Processed Date is '200301' and the frequency is monthly, the account log will have entries of '01 2003' and in the future, the following months (i.e. 02 2003, 03 2003). Valid frequencies are Monthly, Quarterly or Annually.

LAST PERIOD PROCESSED - The Administrator should enter an initial date in this field when the rule is configured. Once the date is set the system updates the date when the account depreciation batch process runs. Do not modify this rule key after initial configuration.

The proper date format is YYYYMM.

LAST RUNTIME DATE - Last Run Date will be updated by the system whenever the batch procedure runs.

Asset Key Segments Rule



Rule ID: ASSET KEY SEGMENTS | Business | Parameter | ☐ Limit?

Desc: This rule defines the Asset Key Flex Segments to customize the Asset ID. Each segment contains a label, length and options. To disable this rule, the label field for SEGMENT1 must be null.

Comment: Segment: The "SEGMENT" column determines which segment, or 'piece', of the Asset ID is being defined.

Segment	Label	Length	Option
SEGMENT1	General	4	Y-
SEGMENT2	Street Number	4	Y-
SEGMENT3	Node Number	5	Y-
SEGMENT4	Lateral Number	3	Y-
SEGMENT5	Sequential Number	6	Y-

Description: Physical Plant Location

The Asset Key Segments business rule defines the Asset Key Flex Segments to customize Asset IDs. Each segment contains a label, length and options.

For more information regarding this feature, please refer to the Asset section of the Resource User Guide.

This functionality allows users to group Asset IDs to make it easier to locate the required asset. Since the system allows an infinite number of Asset IDs to be defined, Asset Key Segments can significantly aid in searching through very large databases.

To disable this Rule, the label field for SEGMENT1 must be null. If the rule is disabled, the Segments view does not appear in the Asset or Fleet Asset module, and the associated functionality is turned off.

Segment

The “SEGMENT” column determines which segment, or “piece”, of the Asset ID is being defined.

Label

The “LABEL” column describes the SEGMENT. It is the label displayed within the Asset module windows.

Length

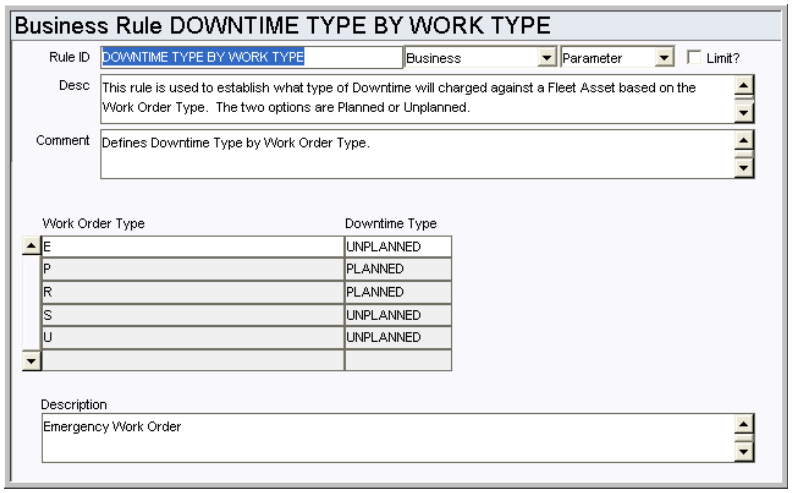
The “LENGTH” column defines the maximum number of characters for the SEGMENT.

Option

The first character in the “OPTION” column indicates whether a code table is to be used: “Y” for YES, “N” for NO. The second character in the “OPTION” column is the delimiter for the SEGMENT.

To make any one SEGMENT a required field, use the Modules Administration - Forms module.

Downtime Type By Work Type



Business Rule DOWNTIME TYPE BY WORK TYPE

Rule ID: DOWNTIME TYPE BY WORK TYPE | Business | Parameter | ☐ Limit?

Desc: This rule is used to establish what type of Downtime will charged against a Fleet Asset based on the Work Order Type. The two options are Planned or Unplanned.

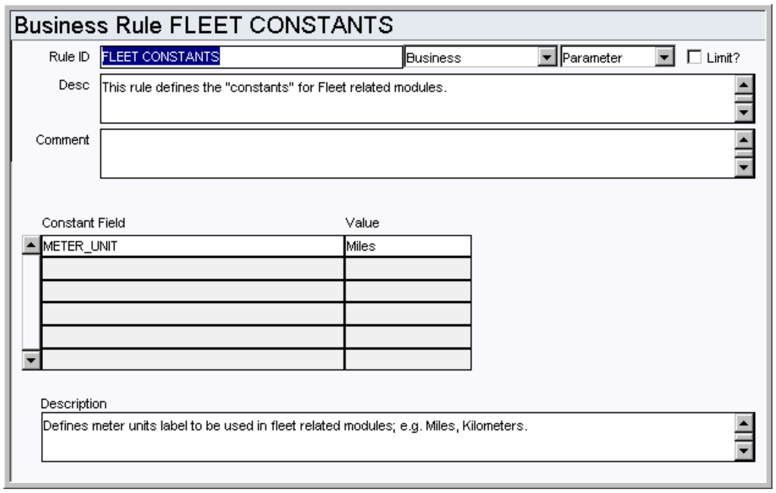
Comment: Defines Downtime Type by Work Order Type.

Work Order Type	Downtime Type
E	UNPLANNED
P	PLANNED
R	PLANNED
S	UNPLANNED
U	UNPLANNED

Description: Emergency Work Order

This business rule is used to establish what type of downtime will charged against a Fleet Asset based on the Work Order Type. The two options for downtime type are Planned or Unplanned. Example: Work Type = E, Downtime type = Unplanned

Fleet Constants Rule



Business Rule FLEET CONSTANTS

Rule ID: FLEET CONSTANTS | Business | Parameter | ☐ Limit?

Desc: This rule defines the "constants" for Fleet related modules.

Comment:

Constant Field	Value
METER_UNIT	Miles

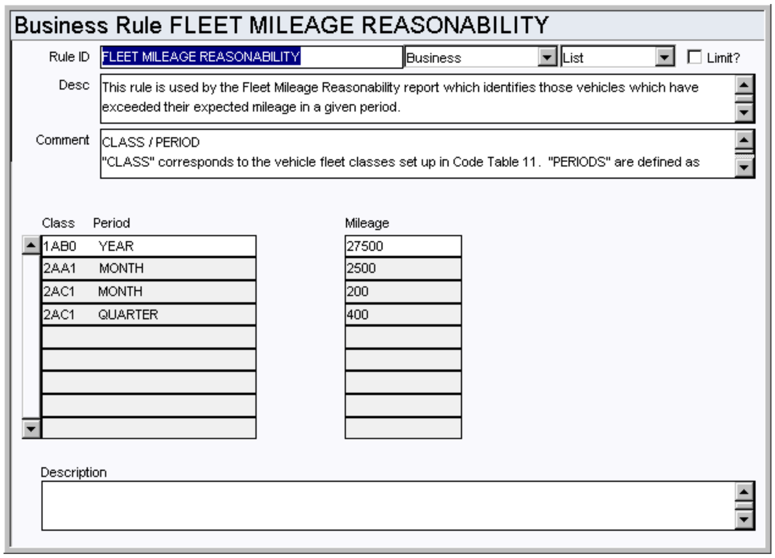
Description: Defines meter units label to be used in fleet related modules; e.g. Miles, Kilometers.

Define the unit type to use in Fleet related modules. If this Business Rule is not configured the default will be the value that was previously hard coded in the forms.

Constant Field and Value

Enter the desired value for meter units in Fleet modules ; e.g. Miles, Kilometers. The list of values for the Value field references Code Table 107.

Fleet Mileage Reasonability Rule



Business Rule FLEET MILEAGE REASONABILITY

Rule ID: FLEET MILEAGE REASONABILITY | Business | List | ☐ Limit?

Desc: This rule is used by the Fleet Mileage Reasonability report which identifies those vehicles which have exceeded their expected mileage in a given period.

Comment: CLASS / PERIOD
"CLASS" corresponds to the vehicle fleet classes set up in Code Table 11. "PERIODS" are defined as

Class	Period	Mileage
1AB0	YEAR	27500
2AA1	MONTH	2500
2AC1	MONTH	200
2AC1	QUARTER	400

Description:

This rule establishes criteria used on the Fleet Mileage Reasonability report which identifies vehicles that have exceeded their expected mileage in a given period.

This report can be accessed by selecting Vehicles Exceeding Mileage Limits from the Search screen in the Fleet Asset module.

Class

Class corresponds to the vehicle fleet classes set up in the Asset Class module.

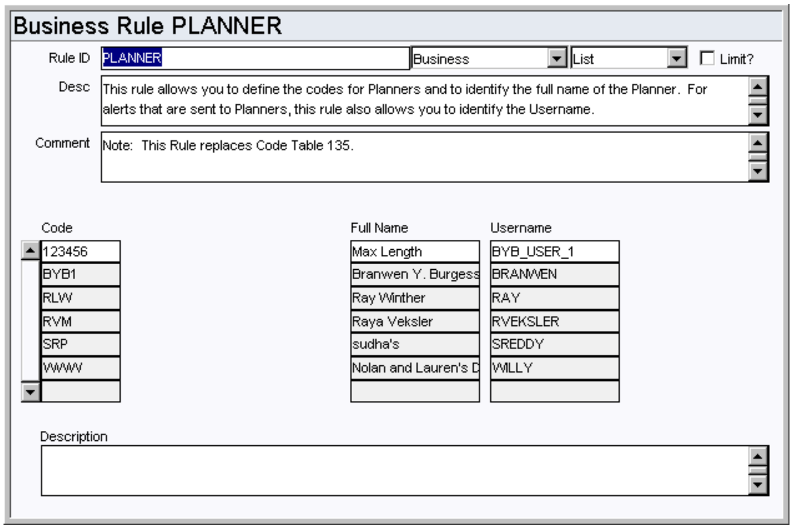
Period

Periods are defined as Year, Quarter, and Month. The list of values attached to this column has each of the vehicle classes from the Asset Class module combined with YEAR, QUARTER and MONTH.

Mileage

This column defines the mileage limit for vehicles. When vehicles exceed this mileage in a time period, they are reported on the Fleet Mileage Reasonability Report. This report can be accessed from the Actions list on the Fleet Asset Search Options screen.

Planner Rule



Rule ID: PLANNER | Business | List | ☐ Limit?

Desc: This rule allows you to define the codes for Planners and to identify the full name of the Planner. For alerts that are sent to Planners, this rule also allows you to identify the Username.

Comment: Note: This Rule replaces Code Table 135.

Code	Full Name	Username
123456	Max Length	BYB_USER_1
BYB1	Branwen Y. Burgess	BRANWEN
RLW	Ray Winther	RAY
RVM	Raya Veksler	RVEKSLER
SRP	sudha's	SREDDY
WWW	Nolan and Lauren's D	WILLY

Description:

Define planner codes, and identify the full names and usernames associated to each code. These codes are used when identifying a planner on work records.

The user associated with the code receives an alert when an event occurs where an alert would be sent to the planner. For example, when a planner plans parts against a work order and needs to be notified when the parts have arrived. This does not mean that the system is configured to send alerts regarding any record where a planner is indicated.

Code

Enter the codes for planners in the Code column. Each code must be unique.

Full Name

Enter the full name of the person associated with the code. A person can be listed on more than one code.

Username

Enter the username of the person associated with the code. Since a person can be listed on more than one code, the username can be listed more than once as well.

Batch Processes

Depreciate Assets - sdbp_end_period_depreciation;

Depreciation costs are posted by batch according to settings in the Asset Depreciation Business Rule.

Code Tables

Code Table 38: Drive Types (More Data View)

Drive Type field - Define values for vehicle capabilities. Typical entries are 4x4 and 2x4. This field is searchable from the Search Options screen.

Code Table 39: Fuel Types (More Data View)

Fuel Type field - Define codes for vehicle fuel requirements. Typical entries are Propane, Leaded, Unleaded, and Diesel.

Code Table 40: Criticality Codes

Criticality field - The criticality number represents the relative work or safety impact of the fleet asset. This number is later used by the system to calculate the overall priority of work orders.

The system contains default entries for Code Table 40, however, you can alter the data. We recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of priority on work orders and work requests.

Code Table 12: Shop Codes

Shop field - Define codes to identify your organizations repair facilities. Since this field is included on the Search Options screen it can be used to search for vehicles being repaired.

Code Table 25: Building Codes

Building field - Define building identifiers for the fleet asset location specific to your organization. The Building field is searchable from the Search Options screen, and can be useful in finding fleet assets when only the building location is known.

Code Table 67: Vehicle Make

Make field - Define codes to further describe vehicles by Make. Typical Vehicle Makes are Ford, Chevy, Toyota, etc. for Passenger Vehicle or Caterpillar for Industrial Vehicle. Vehicle Make is one of the search criteria on the Fleet Asset Search Options screen.

Code Table 510: Vehicle Organization

Organization field - Define codes to indicate which part of your organization the vehicle belongs to, or any other logical definition you would like to use for this field. This field is searchable from the Search Options screen.

Code Table 511: Vehicle Sub-Organization

Sub-Org field - You can use this code table to further define your vehicles according to your business practices. This field is searchable from the Search Options screen.

Code Table 512: Monitoring Group (Fleet Operational/Maintenance View)

Monitoring Group field - Define codes for the group responsible for ensuring that required maintenance is performed on the vehicle.

Vehicle Model Code Tables

Model field - Define codes to further describe vehicles by Model. There are a series of user setup code tables that are linked to Code Table 67 for Vehicle Make. As an example, if the vehicle (Fleet Asset) is a Ford F-150 Pickup truck, Code Table 67 would contain Ford, with a link to another Code Table (ex: 3000) where Code Table 3000 contains all the Make codes for Ford vehicles. In this example, Code Table 3000 would contain at least “F-150” as a value. The Vehicle Model code is only searchable from the Fleet Asset Search Options if the Vehicle Make has already been selected and the Vehicle Make selected has a Model listed in the code table that it's linked to.

Copy Record

FLTASSET - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Activity Log From Asset

Grants the ability to create an asset activity log entry using the action on the Asset record.

Create Emergency WO Fleet Asset

Grants the ability to create an Emergency Work Order by selecting the action on a Fleet Asset record.

Create Work Order Fleet Asset

Grants the ability to create a Work Order record by selecting the action on a Fleet Asset record.

Create Work Request Fleet Asset

Grants the ability to create a Work Request record by selecting the action on a Fleet Asset record.

Reports

S_RPT075 - Equipment History Summary Report

Lists Vehicle maintenance and operating history.

S_RPT077 - Equipment List by Shop Report

Provides an equipment listing by shop for fleet assets and includes acquisition date, depreciation value, and runtime information.

S_RPT076 - Historical Cost Performance Report

Lists historical cost performance for fleet assets.

S_RPT073 - Mechanic Accountability Report

Provides labor distribution per mechanic per shop per sub shop for fleet assets.

Fleet Work Order Module

Fields

Sequence No.: Fleet Work Order No.

The Fleet Work Order record number is comprised of a unique ID (Ex. “01007776”). Fleet Work Order record numbers must be system generated. Manual creation of these record numbers could result in critical system errors when records are created from other records or in batch procedures.

TABLE NAME - SA_WORK_ORDER - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 3: Maintenance (Length = 10)

Class/Catg. field (second field) - Define categories describing types of work. The Maintenance Category field can be searched Fleet Work Order Search Options screen.

Code Table 2: Maintenance Classes (Length = 10)

Class/Catg. field (first field) - Define classes describing types of work. The Maintenance Class field can be searched on the Fleet Work Order Search Options screen.

Code Table 12: Shop Codes (Length = 10)

Shop field - Define codes to identify your organizations repair facilities. Since this field is included on the Search Options screen it can be used to search for vehicles being repaired.

Code Table 41: Work Priority Codes (Length = 1)

Priority field (second field) - Define codes that indicate the relative work or safety impact of the work that is to be done. This information is later used by the system to calculate the overall priority of fleet work orders.

By default the system contains entries for Code Table 41. The user has the ability to alter the data in this Code Table, however we recommend that only the Description field be altered if necessary since the numeric values (1-9) are used in the calculation of Priority.

Code Table 107: Meter Units (Length = 15)

Meter field - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Checkout Request from WO

Grants the ability to create checkout requests by selecting an action on the Work Order Task record.

Log Fleet Downtime

Grants the ability to select Log In/Out as Downtime from the Actions list on the main Fleet Work Order record. The action records in/out times and calculates the downtime based on the operational schedule for the asset.

Repair Removed Part

Grants the ability to use the Repair Removed Part action from the Fleet Work Order Task module Actions list to create a Material Disposition record.

Fleet Work Order Task Module

Fields

Permit Types LOV (Work Order Permit View)

Permit Types, defined in the Permit Types Business Rule, can be selected in this field to identify the Permits that will be required for this work order task. After a Permit Type is identified on this view, "red" Permit text will be displayed on the work order header once the work order is set to Active status, if the Permit Text Business Rule is set to ON.

Code Tables

Code Table 190: Job Codes (Length = 10)

Job field - Define codes to identify standard repairs. Typical entries are job codes for performing an oil change, rotating tires, replacing a fuel filter, and replacing an oil filter. The code table for the Reason field is linked to code table 190. Any available user code table can be used to define the reason field. Code table 660 is recommended.

Code Table 281 - 285: Report Codes 1 - 5 (Length = 10)

The Report Codes fields can be used to classify and generate reports. You can populate these Code Tables with items such as PM, Major Repairs, Accident, and so on. This grouping serves as a method of categorizing fleet work orders for reporting purposes.

(Optional) Code Table 660: Vehicle Reason for Repair (Length = 10)

Reason field - Define codes for the reason to perform maintenance. This code table can be used as the linked code for code table 190, however any available code table can be used as well.

Code Table 661: Vehicle Action Taken (Length = 10)

Action field - Define codes for the action that needs to be taken to perform maintenance on the asset.

Code Table 662: Vehicle System (Length = 3)

System field - Define VMRS (Vehicle Maintenance Reporting Standard) system codes. The Assembly and Component fields will require that you also configure code tables that are linked to code table 662. Suggested code tables to use are 1150 and 1151, but it is not required that you use these.

Code Table 1150: Vehicle Assembly (Length = 3)

Assembly field - Suggested code table to link to CT 662 for the Assembly field. Enter VMRS codes for assembly. If you do not use VMRS these codes can also be configured according to your business practices.

Code Table 1151: Vehicle Component (Length = 3)

Component field -Suggested code table to link to CT 662 for the Component field. Enter VMRS codes for components. If you do not use VMRS these codes can also be configured according to your business practices.

Fleet Benchmark Work Order Module

Fields

Sequence No.: Fleet Benchmark Work Order

The Fleet Benchmark Work Order record number is comprised of a unique ID (Ex. “B000086”). Fleet Benchmark Work Order record numbers must be system generated. Manual creation of these record numbers could result in critical system errors when records are created from other records or in batch procedures.

TABLE NAME - BENCHMARK - The database table that the sequence number is generated for.

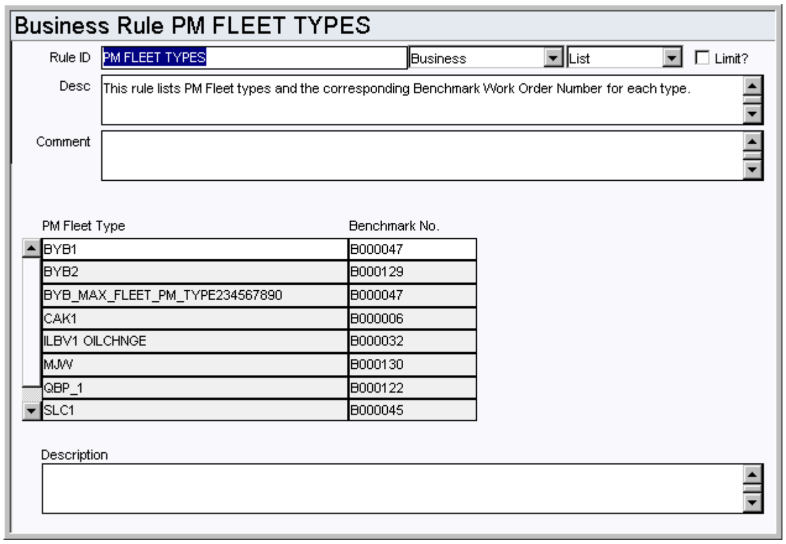
Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Business Rules

PM Fleet Types Rule



Business Rule PM FLEET TYPES

Rule ID: PM FLEET TYPES | Business | List | ☐ Limit?

Desc: This rule lists PM Fleet types and the corresponding Benchmark Work Order Number for each type.

Comment:

PM Fleet Type	Benchmark No.
BYB1	B000047
BYB2	B000129
BYB_MAX_FLEET_PM_TYPE234567890	B000047
CAK1	B000006
ILBV1 OILCHNGE	B000032
MJW	B000130
QBP_1	B000122
SLC1	B000045

Description:

Define PM Fleet Types and the corresponding Benchmark Work Order Number for each Type.

PM Fleet Type

Note: The following items are EXAMPLES of possible PM Fleet Types configuration.

A - This letter denotes a basic 4,000 mile PM that is performed in accordance with an “A” checklist. This PM should be based on mileage or a calendar-interval basis.

B - This letter is used to indicate a more extensive list of items to check. This PM should be based on mileage or a calendar interval basis.

C - This letter denotes the most comprehensive checklist of items to be performed. This PM should be based on mileage or a calendar-interval basis.

G - This letter indicates a transmission service type of maintenance activity. This PM should be used on a calendar-interval basis.

H - This letter indicates that the engine coolant should be changed. This PM should be based on a calendar-interval basis.

Benchmark No.
Enter the Benchmark Work Order Number that corresponds to the PM Fleet Type. Batch processing uses the entered Benchmark Number associated with a PM Fleet Type to create a work order when a Fleet PM Master is cycled.

Copy Record

BENCHFLT- COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Fleet PM Control

You can use the Fleet PM Control module to create and manage identical PM Masters for all fleet assets in a specified Class. This is useful when your fleet operations require the same maintenance to be performed on a group of similar vehicles. By using the Fleet PM Control module, you save the effort of having to update each Asset record independently with the same PM Master information.

A Fleet PM Control record includes the scheduling parameters that are common to all vehicles in the specified Class. The record can also be set to apply only to certain Makes and Models within the specified class.

Fields

Sequence No.: Control No.

The Fleet PM Control record number is comprised of a unique ID (Ex. “00011”). Fleet PM Control record numbers are typically created by users.

TABLE NAME - SA_PM_FLEET_CONTROL - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Class

The list of values for the Class field is controlled by the Asset Class module.

Code Tables

Code Table 67: Vehicle Make (Length = 10)

Make field - Define codes to further describe vehicles by Make. Typical Vehicle Makes are Ford, Chevy, Toyota, etc. for Passenger Vehicle or Caterpillar for Industrial Vehicle. Vehicle Make is one of the search criteria on the Fleet Asset Search Options screen.

Vehicle Model Code Tables

Model field - Define codes to further describe vehicles by Model. There are a series of user setup code tables that are linked to Code Table 67 for Vehicle Make. As an example, if the vehicle (Fleet Asset) is a Ford F-150 Pickup truck, Code Table 67 would contain Ford, with a link to another Code Table (ex: 3000) where Code Table 3000 contains all the Make codes for Ford vehicles. In this example, Code Table 3000 would contain at least “F-150” as a value. The Vehicle Model code is only searchable from the Fleet Asset Search Options screen if the Vehicle Make has already been selected and the Vehicle Make selected has a Model listed in the code table that it's linked to.

Copy Record

FLEETPMC - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reservations/Motorpool Module

Fields

Sequence No.: Reservation No.

The record number is comprised of a unique ID (Ex. “0000000003”). Fleet Reservation numbers are typically set to be system generated.

TABLE NAME - SA_FLEET_RESERVATIONS - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 24: Rental Types (Length = 10)

Rental Type field - Define codes to identify the type of rental. Typical codes include Daily, Weekly, Monthly, Yearly, etc. to represent a charge period.

Reports

S_RPT072 - Reservation Dispatch Report

Lists information check past due motorpool Reservations daily. This information is retrieved from the Reservation/Motorpool module under Fleet in the Maintenance subsystem.

Operational Schedule Module

Fields

Sequence No.: Operational ID

The Operational Schedule record number is comprised of a unique ID (Ex. “01007776”). Operational ID numbers are typically set to be user entered.

TABLE NAME - SA_OPERATIONAL_SCHEDULE - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 570: Hour

Define hourly increments that are applicable to the schedule.

Code Table 571: Minute

Define minute increments that are applicable to the schedule.

Code Table 710: Week Days

Define the days of the week that are applicable to the schedule.

Copy Record

OPERSCHD - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Permit Template Module

Use this module to track permits needed for certain types of work. Permits are usually required by outside regulation demanding creation of an audit trail to show proper procedures were followed. For example, working with hazardous materials typically requires permits indicating that the person doing the work has been trained and certified, that isolation procedures were followed, etc. Any documents attached to the Permit Template record (i.e. MSDS, Drawings, or other electronic documents) will be copied over to assets and permits that reference the Permit Template.

Fields

Sequence No.: Template ID

The Permit Template record number is comprised of a unique ID (Ex. "TMP006"). Permit Template numbers are typically set to be created manually.

TABLE NAME - SA_PERMIT_TEMPLATE - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Checklist Title - User Defined Code Table

The selections of Checklist Title(s) displayed in this field on the Permit Template, are validated against the Permit Type selected for each Permit Template.

Checklist Titles are first created in a User-Defined Code table, and then associated with the Permit TYPE in the Permit Type Business Rule.

Only those Checklists Titles, associated with the selected Permit Type will be displayed as selections in the Template Checklist Title field.

Checklist Description - User Defined Code Table

The selection of Checklist Descriptions displayed in this field on the Permit Template, are validated against the Permit Type and Checklist Title selected for each Permit Template.

Checklists are first created in a User-Defined Code table, and then associated with the Permit TYPE in the Permit Type Business Rule.

Only those Checklists Descriptions, associated with the selected Permit Type and Checklist Title, will be displayed as selections in the Template Checklist Description field.

Duration - User Defined Code Table

This field establishes the LOV for the Duration (time) field on a Permit, indicating how long the Permit remains active after the date and time in the Start field. The Duration Code Table listed on the Permit Type Business Rule is a User Defined Code Table that contains values for duration.

Copy Record

PERMTMPL - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Permits Module

Fields

Sequence No.: Permit No.

The record number is comprised of a unique ID (Ex. "PER0000075"). Permit record numbers are typically set to be system generated.

TABLE NAME - SA_PERMIT - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate Approval Titles for Permit records in the Approval Limit module under Approvals and Routes in the Administration subsystem.

Code Tables

Code Table 8: Permit Cancel Codes (Length = 10)

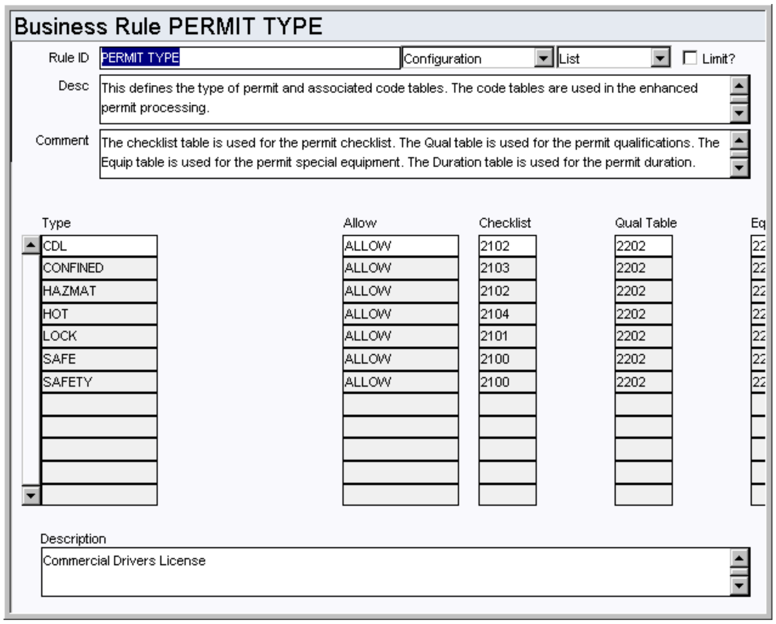
Cancel dialog box - Define reason codes for canceling permits that have been previously been created for expected work. This code table is attached to the "Please enter the reason for canceling this Permit:" field which pops up when you change the status of a permit to Canceled. Some examples of data are: Confined space not entered, duplicate permit, flooded, hazard encountered, inclement weather, work order task canceled etc.

Code Table 62: Current Position

Current Position field - Create codes to indicate possible positions for tag points.

Business Rules

Permit Type Rule



Business Rule PERMIT TYPE

Rule ID: PERMIT TYPE | Configuration | List | ☐ Limit?

Desc: This defines the type of permit and associated code tables. The code tables are used in the enhanced permit processing.

Comment: The checklist table is used for the permit checklist. The Qual table is used for the permit qualifications. The Equip table is used for the permit special equipment. The Duration table is used for the permit duration.

Type	Allow	Checklist	Qual Table	Eq
CDL	ALLOW	2102	2202	22
CONFINED	ALLOW	2103	2202	22
HAZMAT	ALLOW	2102	2202	22
HOT	ALLOW	2104	2202	22
LOCK	ALLOW	2101	2202	22
SAFE	ALLOW	2100	2202	22
SAFETY	ALLOW	2100	2202	22

Description: Commercial Drivers License

Define the types of permits used in the system. You can also associate each permit type to user-defined code tables listing the Permit Checklist(s), Qualification(s), Special Equipment, and Duration values.

Type

The values entered in the Type column are used to define the different categories, or types of permit templates and permits utilized at your facility. Typical Permit Types are Excavation, Easement, Hazardous Material, Hot Work, and Confined Space.

Allow

Enter ALLOW or DISALLOW to designate valid Permit Types. ALLOW will designate the Permit Type is valid, and entering DISSALLOW will make the Type code invalid for future use on Permits and Permit Template records.

Checklist

Enter the User-defined Code Table number that defines the Checklist you wish to associate to the Permit Type value.

Qualifications

Enter the User-defined Code Table number that defines the Qualifications you wish to associate to the Permit Type value. NOTE: Note: If the client wishes to link a specific employee to a Qualification on a Permit record, the Employee field LOV associated with the Permit Qualification will only list those Employees whose Training record Course (Code Table 45) matches the Qualification exactly (including spelling).

Special Equipment

Enter the User-defined Code Table number that defines the Special Equipment you wish to associate to the Permit Type value.

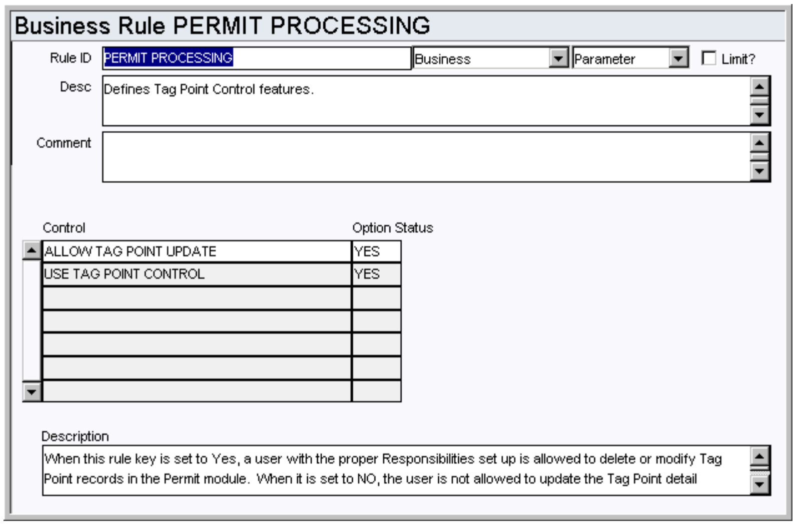
Duration

Enter the User-defined Code Table number that defines the Duration criteria you wish to associate to the Permit Type value.

Tag Pt Ctrl

If the value in this column is set to YES for the selected permit type, tag point processing will apply for permits of that type. If the value is set to NO, tag point processing does not apply, and the statuses, views, and options in the Permit module will be adjusted accordingly to exclude this processing.

Permit Processing Rule



Business Rule PERMIT PROCESSING

Rule ID: PERMIT PROCESSING | Business | Parameter | ☐ Limit?

Desc: Defines Tag Point Control features.

Comment:

Control	Option Status
ALLOW TAG POINT UPDATE	YES
USE TAG POINT CONTROL	YES

Description: When this rule key is set to Yes, a user with the proper Responsibilities set up is allowed to delete or modify Tag Point records in the Permit module. When it is set to NO, the user is not allowed to update the Tag Point detail

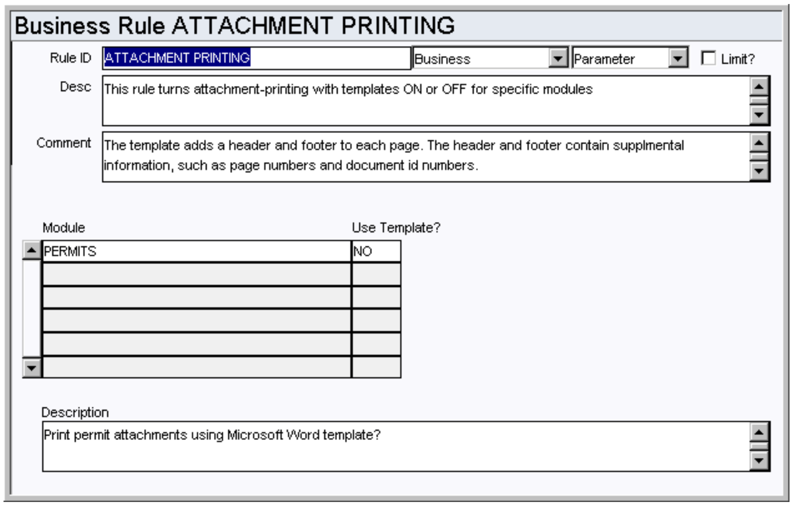
Define Tag Point control features.

Control and Option Status

ALLOW TAG POINT UPDATE - If this rule key is set to YES, the user is allowed to update the entire Tag Point detail records in the Permit module. When it is set to NO, the user is only allowed to update the Tag Point status, current position and personal protection card(s) fields.

USE TAG POINT CONTROL - This rule key was made obsolete in release 1.7.15 and will be removed in a future release. It was replaced by the Tag Pt Control option in the Permit Type business rule.

Attachment Printing Rule



Business Rule ATTACHMENT PRINTING

Rule ID: ATTACHMENT PRINTING | Business | Parameter | ☐ Limit?

Desc: This rule turns attachment-printing with templates ON or OFF for specific modules

Comment: The template adds a header and footer to each page. The header and footer contain supplmental information, such as page numbers and document id numbers.

Module	Use Template?
PERMITS	NO

Description: Print permit attachments using Microsoft Word template?

Indicate whether or not a template should be applied when Permit records are printed.

Module and Use Template?

Currently this option is only available in the Permit module. Indicating YES will cause the documents to print with the additional header and footer information from the template.

Copy Record

PERMIT - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Add Tag Points

Grants the ability to add Tag Points to a Permit record.

Permit to Active

Grants the ability to activate a Permit record.

Release All

Grants the ability to change all tag point statuses to Released.

Tag All

Grants the ability to change all tag point statuses to Tagged.

Verify All

Grants the ability to change all tag point statuses to Verified.

Reports

S_RPT098 - Confined Space Report

Generates a permit check list for Confined Space type permits and can be taken into the field to track the following: safety guidelines, hazards, isolation points, specification readings, and authorized signatures.

S_RPT101 - Confined Space Report [Blank]

Generates a generic Confined Space Permit that can be printed multiple times to track permit information and signatures. This is not a true report as the contents are not related to templates found in the Permit Templates module. This report acts more as a worksheet that is typically used by clients that are not using the Permits module.

S_RPT099 - Hot Work Permit Report

Generates a permit check list for Hot Work type Permits and can be taken into the field to track the following: Hazards, isolation points, specification readings, and authorized signatures.

S_RPT102 - Hot Work Permit Report [Blank]

Generates a generic Hot Work Permit that can be printed multiple times to track permit information and signatures. This is not a true report as the contents are not related to templates found in the Permit Templates module. This report acts more as a worksheet that is typically used by clients that are not using the Permits module.

S_RPT113 - Lockout Tagout Report

Lists Asset Data and Lockout Authorizations for Permits.

S_RPT100 - Safety Work Permit Report

Generates a permit check list for Safety Work type Permits and can be taken into the field to track the following: safety guidelines, hazards, isolation points, specification readings, and authorized signatures.

Tag Point Module

Fields

Sequence No.: Tracking No.

The record number is comprised of a unique ID. Users typically have the system generate this number.

TABLE NAME - SA_TAG_POINT - The record number is comprised of a unique ID. Tag Point numbers are typically set to be created manually.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 1193: Tag Point Category

Category field - Define categories to classify tag points.

Code Table 25: Building Codes

Building field - Define codes for asset locations specific to the client organization. The Building field is searchable from the Search Options screen, and can be useful in finding assets when only the building location is known.

Code Table 61: Source Type

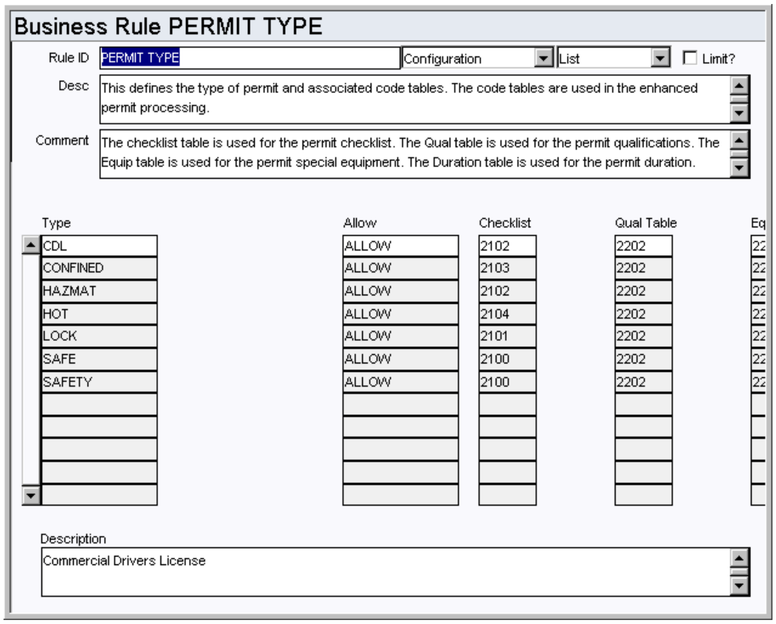
Source Type field - Define the type of equipment which needs to be adjusted prior to working on a designated area. Examples of data are: Upstream Breaker, Downstream Breaker, Upstream Valve, Downstream Valve.

Code Table 62: Positions for Isolation

Lockout Position and Release Position fields - Define lockout or release positions such as OFF, ON, OPEN or CLOSED.

Business Rules

Permit Type Rule



Business Rule PERMIT TYPE

Rule ID: PERMIT TYPE | Configuration | List | ☐ Limit?

Desc: This defines the type of permit and associated code tables. The code tables are used in the enhanced permit processing.

Comment: The checklist table is used for the permit checklist. The Qual table is used for the permit qualifications. The Equip table is used for the permit special equipment. The Duration table is used for the permit duration.

Type	Allow	Checklist	Qual Table	Eq
CDL	ALLOW	2102	2202	22
CONFINED	ALLOW	2103	2202	22
HAZMAT	ALLOW	2102	2202	22
HOT	ALLOW	2104	2202	22
LOCK	ALLOW	2101	2202	22
SAFE	ALLOW	2100	2202	22
SAFETY	ALLOW	2100	2202	22

Description: Commercial Drivers License

Define the various types of permits and each Permit Type's associated user-defined code tables listing the Permit Checklist(s), Qualification(s), Special Equipment, and Duration values.

Type
The values entered in the Type column are used to define the different categories, or types of permit templates and permits utilized Mat your facility. Typical Permit Types are Excavation, Easement, Hazardous Material, Hot Work, and Confined Space.

Allow
Enter ALLOW or DISALLOW to designate valid Permit Types. ALLOW will designate the Permit Type is valid, and entering DISSALLOW will make the Type code invalid for future use on Permits and Permit Template records.

Tag Pt Ctrl
If the value in this column is set to YES for the selected permit type, tag point processing will apply for permits of that type. If the value is set to NO, tag point processing does not apply, and the statuses, views, and options in the Permit module will be adjusted accordingly to exclude this processing.

Copy Record

TAGPOINT - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

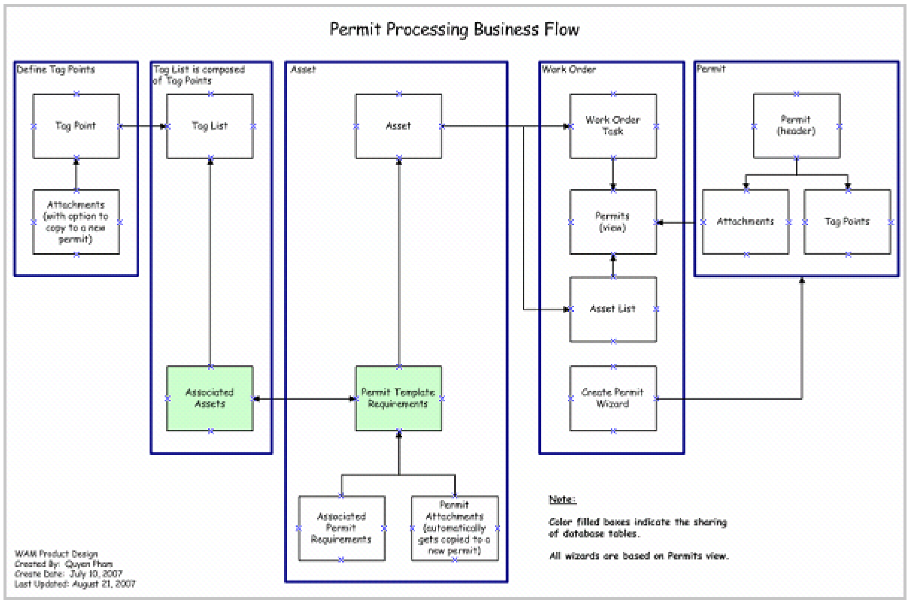
Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Tag List

Grants the ability to create a tag list from tag points in the Tag Points module. The action is only available on the Results of Search screen.

Permit Processing Business Flow

The following diagram illustrates the relationship between the views and modules involved in permit processing when tag point processing functionality is in use.


Permit Processing Business Flow
Define Tag Points
Tag Point
Attachments (with option to copy to a new permit)
Tag List is composed of Tag Points
Tag List
Associated Assets
Asset
Asset
Permit Template Requirements
Associated Permit Requirements
Permit Attachments (automatically gets copied to a new permit)
Work Order
Work Order Task
Permits (view)
Asset List
Create Permit Wizard
Permit
Permit (header)
Attachments
Tag Points
Note:
Color filled boxes indicate the sharing of database tables.
All wizards are based on Permits view.
WAM Product Design
Created By: Quyen Pham
Create Date: July 10, 2007
Last Updated: August 21, 2007

Tag List Module

Fields

Sequence No.: Tracking No.

The record number is comprised of a unique ID. Users typically have the system generate this number.

TABLE NAME - SA_TAG_LIST - The record number is comprised of a unique ID. Tag List numbers are typically set to be created manually.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Copy Record

TAGLIST- COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Associate Tag List

Grants access to the action available in the Associated Assets view of the Tag List module. The action allows users to associate the tag list to an Asset record.

PM Master Module

Fields

Sequence No.: PM Master No.

The PM Master record number is comprised of a unique ID (Ex. “000029”). PM Master record numbers are typically system generated.

TABLE NAME - SA_PM_MASTER - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 198: PM Categories

PM Category field - Define classification and searchability codes for PM Masters.

Code Table 107: Units

Meter Units field (unlabeled next to Interval field on Run-Time PMs) - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Code Table 108: Event Groups

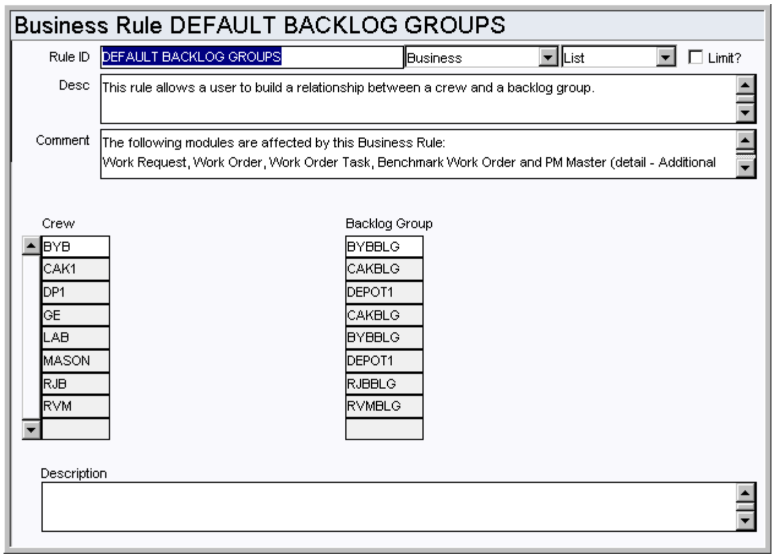
Event Group field - Define valid values to categorize PM Masters into logical groups. For example, all PMs that should cycle in the Winter may be in the group ‘Winter’ or all PMs involved in a major shutdown would be in the group ‘Major.’ The Event Groups field only appears on Event Type PM Masters (defined in the Schedule Basis field). Set the group to make the PM available under that group type in the PM Event module.

Code Table 109: Event Types

Event Type field - Further define Events by type. For example, PMs that should cycle in the Winter that are related to snow removal could be called “Removal”. The Event Types field only appears on Event Type PM Masters (defined in the Schedule Basis field).

Business Rules

Default Backlog Groups Rule



Rule ID: DEFAULT BACKLOG GROUPS

Desc: This rule allows a user to build a relationship between a crew and a backlog group.

Comment: The following modules are affected by this Business Rule:
Work Request, Work Order, Work Order Task, Benchmark Work Order and PM Master (detail - Additional

Crew	Backlog Group
BYB	BYBBLG
CAK1	CAKBLG
DP1	DEPOT1
GE	CAKBLG
LAB	BYBBLG
MASON	DEPOT1
RJB	RJBBLG
RVM	RVMBLG

Description

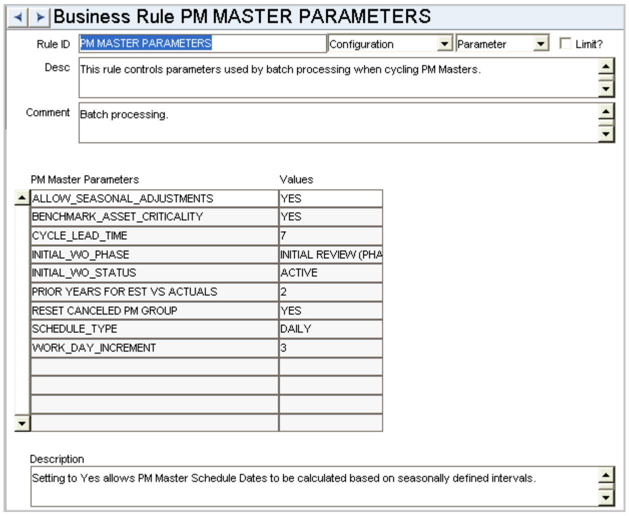
Build a relationship between crews and backlog groups (sometimes called backlog crews) for Work Requests, Work Order Tasks, Benchmark Work Order Tasks, PM Masters, and on schedules.

An example of how the concept of a backlog crew may be used is that Crew A (Crew) works 1st shift and Crew B (Backlog Group) works 2nd or 3rd shift and takes on any unfinished tasks originally scheduled for Crew A (Crew) on 1st shift.

Crew and Backlog Group

Enter the crews and the associated Backlog Groups for each in the appropriate columns.

PM Master Parameters Rule



Rule ID: PM MASTER PARAMETERS

Desc: This rule controls parameters used by batch processing when cycling PM Masters.

Comment: Batch processing.

PM Master Parameters	Values
ALLOW_SEASONAL_ADJUSTMENTS	YES
BENCHMARK_ASSET_CRITICALITY	YES
CYCLE_LEAD_TIME	7
INITIAL_WO_PHASE	INITIAL REVIEW (PHA
INITIAL_WO_STATUS	ACTIVE
PRIOR YEARS FOR EST VS ACTUALS	2
RESET CANCELED PM GROUP	YES
SCHEDULE_TYPE	DAILY
WORK_DAY_INCREMENT	3

Description: Setting to Yes allows PM Master Schedule Dates to be calculated based on seasonally defined intervals.

Control parameters used by batch processing when cycling PM Masters.

PM Master Parameters and Values

ALLOW_SEASONAL_ADJUSTMENTS - When this parameter is set to YES, PM Master schedule dates can be calculated based on seasonal intervals defined in the PM Seasonal

Adjustment business rule. When this parameter is set to NO, The Seasonal Adjustments view in the PM Master module is not available.

BENCHMARK_ASSET_CRITICALITY - Used to determine whether the Asset Criticality is pulled from the benchmark work order or the Asset record when a work order is generated from a PM Master cycle. This capability addresses a situation where an asset has multiple Criticality values depending on the nature of the work being performed.

When the Key Value is set to YES, the Asset Criticality is always pulled from the Benchmark Work Order record.

When the Key Value is set to NO, the Use Asset/ Component from Benchmark indicator on the PM Master determines whether the Asset Criticality is pulled from the Benchmark or the Asset record.

CYCLE_LEAD_TIME - Determines the number of days before a PM is due that the system generates a work order. This allows planners and schedulers the time they need to prepare before the work actually comes due.

INITIAL_WO_PHASE - This phase defines the phase that the work order task is set to when PM Cycle batch is run. Phases are defined in the Work Order Task Planning Rule.

INITIAL_WO_STATUS - The status the work order is created in when cycled by batch. Valid options are PLANNING and ACTIVE.

PRIOR YEARS FOR EST VS ACTUALS - This rule key determines the number of years prior to the current year to use when retrieving closed Work Orders on PM Master Material and Labor Estimate views. For example, entering a 1 will calculate the estimates with Work Orders closed in the current calendar year and last calendar year, entering a 2 will calculate the estimates with Work Orders closed in the current calendar year and the prior two calendar years and so on. Entering a value of 0 will calculate the estimate with only Work Orders closed in the current calendar year. Leaving the value column empty will calculate the estimate with all closed Work Orders, regardless of when they were closed.

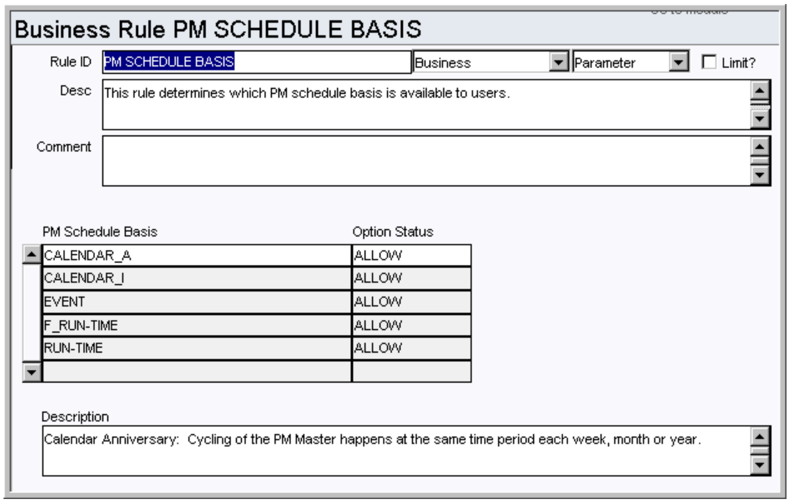
SCHEDULE_TYPE - Determines on which schedule the PM Work Order records generated should be placed. Valid options are DAILY and WEEKLY.

Note: Further options for daily and weekly schedules are available in the Auto-Generate Daily Schedule , Auto-Generate Weekly Schedule and Work Week business rules.

WORK_DAY_INCREMENT - Limits the number of times the system tries to locate a working day (not a weekend or holiday) to schedule the work order. An example might be when you enter the next schedule date for a PM designed to cycle on the last working day of the month. If that day is the 31st (a Sunday), the system reviews the previous day to see if it is a valid working day. This continues until the number of attempts defined here is reached. The last day of the month is then selected as the next schedule date.

RESET CANCELED PM GROUP - This option determines scheduling of lesser PM Masters in a PM Group when a higher level PM cycles, superseding the lesser PMs, but then the higher level PM Work Order is canceled or rejected. When this option is set to NO, canceling or rejecting the higher level PM Work Order simply cancels all PMs in the group and resets them to cycle on the next schedule date or runtime trigger. If this option is set to YES, canceling or rejecting the higher level PM Work Order cancels only the higher PM and all superseded PM Masters within the group are reset to cycle as previously forecast before the higher level PM cycled. If the YES setting is used, it is strongly recommended that the current meter reading field on Fleet PM Master be configured as a status required field at Finished to ensure accurate runtime forecasting. The default setting is NO.

PM Schedule Basis Rule



Business Rule PM SCHEDULE BASIS

Rule ID: PM SCHEDULE BASIS | Business | Parameter | ☐ Limit?

Desc: This rule determines which PM schedule basis is available to users.

Comment:

PM Schedule Basis	Option Status
CALENDAR_A	ALLOW
CALENDAR_I	ALLOW
EVENT	ALLOW
F_RUN-TIME	ALLOW
RUN-TIME	ALLOW

Description: Calendar Anniversary: Cycling of the PM Master happens at the same time period each week, month or year.

Configure the types of PM schedules available. There are several different schedule basis settings for PM Masters available within the system. They control the type of cycling information entered on a PM Master.

PM Schedule Basis

CALENDAR_A - Stands for Calendar Anniversary. Cycling of the PM Master happens at the same time period each week, month, or year. An example might be cycling the PM Master on the 15th of each month. There are more specific processing rules associated with this schedule basis.

CALENDAR_I - Stands for Calendar Interval . Cycling of the PM Master happens at the same time increment. An example might be cycling the PM Master once every two weeks. Again, there are more specific processing rules associated with this schedule basis.

EVENT - Causes Event-based PM Masters set up to cycle each time a specified event occurs, such as a shutdown. There are specific processing rules associated with this schedule basis.

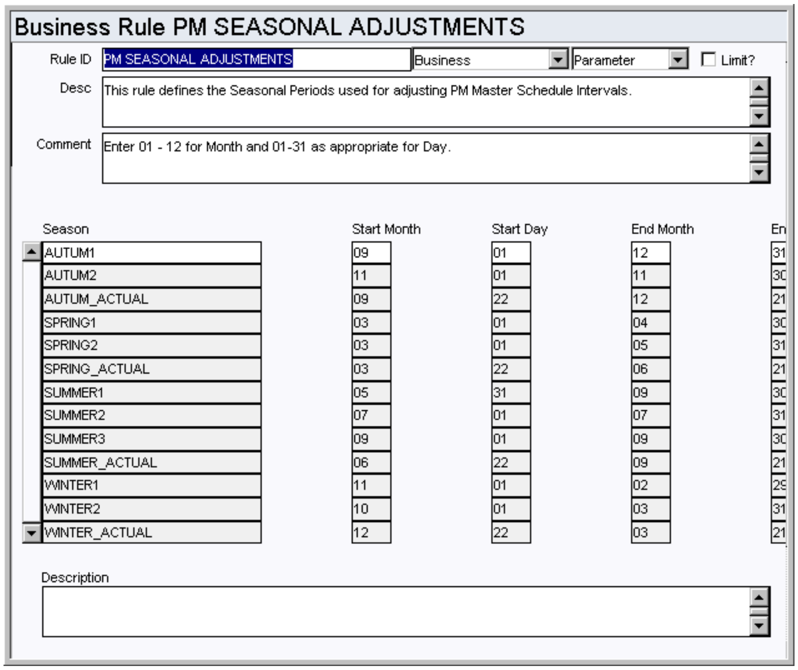
F_RUN-TIME - Run-Time Interval: PM Masters to cycle based upon a Fixed Interval Runtime.

RUN-TIME - Causes Run-time based PM Masters to cycle based upon meter readings taken for the listed asset number. This might be by number of starts/stops, number of hours running, and so on. There are more specific processing rules associated with this schedule basis.

Option Status

Set the option status for a schedule basis to ALLOW or DISALLOW to use or not use that basis in the PM Master module.

PM Seasonal Adjustments Rule



Business Rule PM SEASONAL ADJUSTMENTS

Rule ID: PM SEASONAL ADJUSTMENTS | Business | Parameter | ☐ Limit?

Desc: This rule defines the Seasonal Periods used for adjusting PM Master Schedule Intervals.

Comment: Enter 01 - 12 for Month and 01-31 as appropriate for Day.

Season	Start Month	Start Day	End Month	En
AUTUM1	09	01	12	31
AUTUM2	11	01	11	30
AUTUM_ACTUAL	09	22	12	21
SPRING1	03	01	04	30
SPRING2	03	01	05	31
SPRING_ACTUAL	03	22	06	21
SUMMER1	05	31	09	30
SUMMER2	07	01	07	31
SUMMER3	09	01	09	30
SUMMER_ACTUAL	06	22	09	21
WINTER1	11	01	02	29
WINTER2	10	01	03	31
WINTER_ACTUAL	12	22	03	21

Description:

Do not overlap the start or end dates of seasons. If you do, the system will write an error to the Job Manager Log and use the interval on the PM Master header until the overlapping dates are corrected.

This rule defines the seasonal periods that can be used for adjusting PM Master schedule intervals. For each season you need to define, enter a season name, start month and day and end month and day. All months and days must be entered using a two character format (01-12 for months, 01-31 for days).

Batch Processes

PM Cycle - sdbp_pm_cycle_job.start_job;

Cycles active PM Masters that are due; creating work orders in the status defined in the PM Master Parameters business rule. If the PM is being cycled and the Benchmark's component is no longer installed on the Benchmark's asset, the system will generate a work order with the asset from the Benchmark and will not bring over the component.

PM Finish - sdbp_pm_finish;

Processes PM Master information for those PMs where the associated work order has been set to Finished status. This includes entering the work completion date, inserting a new Forecast record (to maintain the correct number of future Cycles), and setting any skipped Forecast dates to Canceled status. The next schedule date is recalculated (for Calendar Interval PMs) and is placed on the PM Master record.

PM Routing - sdbp_pm_routing;

Updates PM Stops based upon the Completed Dates entered on a scheduled PM route list. next schedule dates are then adjusted as required and the PM route stop item is set to Posted status.

Copy Record

PMMASTER- COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Cancel PM Master Backlog

Grants the ability to cancel forecasted backlog on the PM Master Forecast view.

Credit PM

Grants the ability to use one work order to credit multiple PM Forecasts from PMs that may not have created the original work order.

Show Cycle This PM Now Action

Allows users to access the Cycle this PM Now action in the PM Master module.

Show Cycle PM Group Now Action

Allows users to access the Cycle this PM Group Now action in the PM Master module.

Update Estimate Hours

Grants access to the action which allows the user to update Benchmark Work Order Estimates with the average from historical hours.

Update Estimate Quantity

Grants access to the action which allows the user to update Benchmark Work Order Estimates with the average from historical usage.

Reports

S_RPT090 - PM By Asset Report

Lists the PM Masters and subordinate PM Masters by asset.

S_RPT074 - Preventive Maintenance Report

Lists information to schedule vehicles for PM’s on a monthly basis.

Charts

S_CHT124 - Corrective vs. Preventive Work Orders

A comparison of Corrective Work Orders to Preventive Work Orders for the current year and the previous year. The data can be filtered further by Plant, Department and Area. Other filtering options, including Department, Area and Asset, are available in the Chart Field List.

S_CHT142 - Late PMs for Safety Equipment

The number of late PMs for safety equipment to total PMs for safety equipment, for the current year and the previous year. An asset is considered to be “safety equipment” if the Safety Critical indicator on a Work Order Task record is checked. The data can be filtered by plant. Other filtering options, including Department, Area and Asset, are available in the Chart Field List.

S_CHT143 - Late Preventive Maintenance Work Orders

A comparison of the number of Late PMs to Total PMs for the current year and the previous year. The data can be filtered by plant. Other filtering options available in the Chart Field List include Department, Area and Asset.

S_CHT164 - PM Forecast Months

The number of PM Work Orders forecasted for the current year and the next five years. The data can be viewed by Year, Quarter and/or Months. The data can be filtered further by Plant and Crew.

S_CHT129 - PM Forecast Months - Estimated Duration

The number of PM Work Orders forecasted for the current year and the next five years. The data can be viewed by Year, Quarter and/or Months. The data can be filtered further by Plant and Crew.

S_CHT130 - PM Forecast Weeks

The number of PM Work Orders forecasted for the current year and the next five years. The data can be viewed by Year and/or Weeks. The data can be filtered further by Plant and Crew.

S_CHT165 - PM Forecast Weeks - Estimated Duration

The estimated duration of Preventive Maintenance Work Orders forecasted for the current year and the next five years. The data can be viewed by Year and/or Weeks. The data can be filtered further by Plant and Crew.

S_CHT131 - PM History Months

The number of Preventive Maintenance Work Orders that were scheduled for the current year and the previous five years. The data can be view by Year, Quarter and/or Months. The data can be filtered further by Plant and Lead Crew. Other filtering options, such as Department and Area, are available in the Chart Field List.

S_CHT132 - PM History Weeks

The number of Preventive Maintenance Work Orders that were scheduled for the current year and the previous five years. The data can be view by Year and/or Weeks. The data can be filtered further by Plant and Lead Crew. Other filtering options, such as Department and Area, are available in the Chart Field List.

S_CHT146 - Preventive Maintenance Investment

The actual amount spent on Preventive Maintenance compared to the total amount spent on maintenance for the current year and the previous year. The data can be filtered further by Plant. Other filtering options, including Department, Area and Asset, are available in the Chart Field List.

S_CHT147 - Preventive Work Orders

The number of Preventive Work Orders compared to Total Work Orders, for the current year and the previous year. The data can be filtered further by Plant. Other filtering options available in the Chart Field List include: Department, Area and Asset.

Metrics

S_MTRC5 - Percent Preventive Work - sdbp_metric_pct_pm_wos

This metric is to describe the relationship between the number of PM Work Orders and the total number of Work Orders as a percentage. A PM Work Order is a Work Order with work type “P”. It provides a means to monitor and improve the ratio of the number of PM Work Orders versus the total number of Work Orders.

S_MTRC10 - Percent PM Investment - sdbp_metric_pct_pm_investment

Describes the relationship between the PM WO dollars and the total dollars of all WOs as a percentage. PM Work Orders provide a means to monitor the dollar amount being invested in preventive maintenance versus the total dollar amount used for maintenance.

S_MTRC8 - Late PMs for Safety Equipment - sdbp_metric_late_pms_safety

A count of the total number of PMs that are late and related to Safety Critical Equipment. It provides a means to monitor and improve on the number of Safety Equipment related PMs that are late.

S_MTRC9 - Late PMs - sdbp_metric_late_pm

This metric is a count of the total number of PMs that are late. It provides a means to monitor and improve on the number of PMs that are late.

PM Event Module

Code Tables

Code Table 108: Event Groups

Event Group field - Define valid values to categorize PM Masters into logical groups. For example, all PMs that should cycle in the Winter may be in the group 'Winter' or all PMs involved in a major shutdown would be in the group 'Major.' The Event Groups field only appears on Event Type PM Masters (defined in the Schedule Basis field).

Code Table 109: Event Types

Event Type field - Further define Events by type. For example, PMs that should cycle in the Winter that are related to snow removal could be called "Removal". The Event Types field only appears on Event Type PM Masters (defined in the Schedule Basis field).

Copy Record

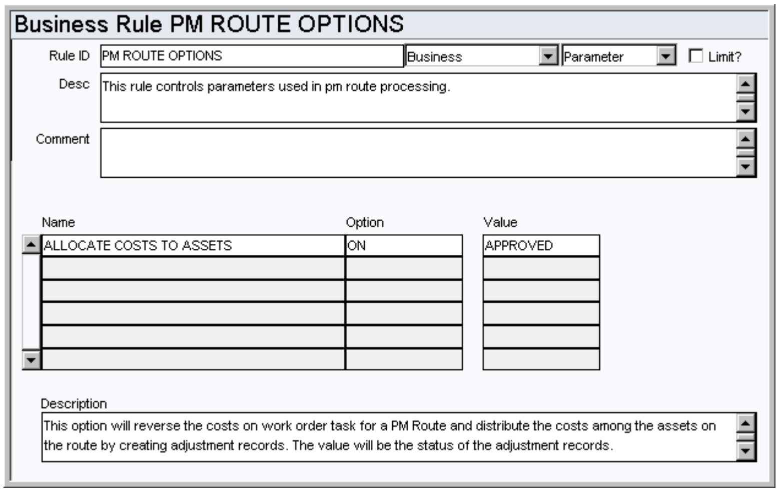
PMEVENT - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

PM Route Module

Business Rules

PM Route Options Rule



Business Rule PM ROUTE OPTIONS

Rule ID: PM ROUTE OPTIONS | Business | Parameter | ☐ Limit?

Desc: This rule controls parameters used in pm route processing.

Comment:

Name	Option	Value
ALLOCATE COSTS TO ASSETS	ON	APPROVED

Description: This option will reverse the costs on work order task for a PM Route and distribute the costs among the assets on the route by creating adjustment records. The value will be the status of the adjustment records.

Control parameters used in PM Route processing.

Name, Option, and Value

ALLOCATE COSTS TO ASSETS - If you set the Allocate Costs to Assets rule key to ON, the system will manage the costs for a work order task on a PM Route so that the costs are evenly distributed among the assets on the route. The system completes this re-distribution of costs by creating cost adjustment records.

The value is the status that the adjustment records will be created in.

Code Tables

Code Table 20: PM Route Types

Type field - Define PM Route types. Typical entries include Adjust, Calibrate, Clean, Exercise, Inspect, Lubricate, Reading, Sample and Test.

Code Table 49: PM Route Task Types (Route Stops View)

Task Type field - Define categories for tasks. Typical entries include Calib for instrument calibration, Vibration for vibration readings, Lube for a lubrication, etc.

Code Table 44: Lube Types (Route Stops View)

Type field (next to Sample Required?) - Define codes to identify the type of lubrication being used for the work. Typical Lube Types include Gear Oil, Engine Oil, Grease, etc.

Code Table 42: Lube Methods (Route Stops View)

Method field - Define codes to identify the method for lubrication. Examples include Gun, Tube, etc.

Batch Processes

Cost Adjustment for PM Route - sdbp_cost_route.cost_route;

Generates and posts cost adjustments to remove charges from the work order task account and distribute them among the PM Route's assets. Labor and material costs related to accomplishing the Scheduled PM Route are charged against the work order's task and then distributed amongst the assets that were finished on the PM Route.

PM Routing - sdbp_pm_routing;

Updates PM Stops based upon the Completed Dates entered on a Scheduled PM Route List. Next Schedule Dates are then adjusted as required and the PM Route Stop item is set to Posted.

Copy Record

PMROUTE - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reports

S_RPT058 - PM Route Report

Lists PM Route information.

Project/Subproject Module

Fields

Sequence No.: Project ID

The record number is comprised of a unique ID (Ex. “00000000001”). Project record numbers are typically set to be system generated.

TABLE NAME - SA_PROJECT - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate approvers for Direct Charges in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Code Tables

Code Table 310: Supervisor Title

Supervisor field - Define the supervisor titles to be used for various records. These codes define a supervisory position, not a specific person. Some examples of titles are Head Supervisor, Maintenance Supervisor, and Foreman.

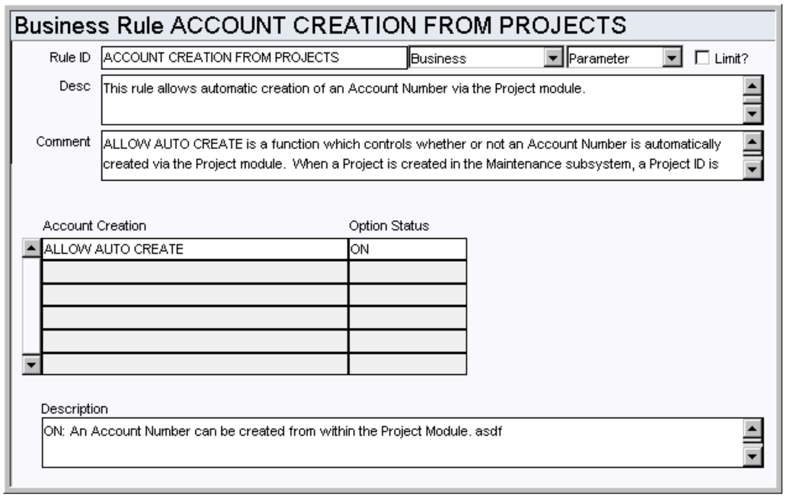
Copy Record

PROJECT - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Business Rules

Account Creation from Projects Rule



Business Rule ACCOUNT CREATION FROM PROJECTS

Rule ID: ACCOUNT CREATION FROM PROJECTS | Business | Parameter | ☐ Limit?

Desc: This rule allows automatic creation of an Account Number via the Project module.

Comment: ALLOW AUTO CREATE is a function which controls whether or not an Account Number is automatically created via the Project module. When a Project is created in the Maintenance subsystem, a Project ID is

Account Creation	Option Status
ALLOW AUTO CREATE	ON

Description: ON: An Account Number can be created from within the Project Module. asdf

Allow or Disallow automatic creation of an Account Number via the Project module.

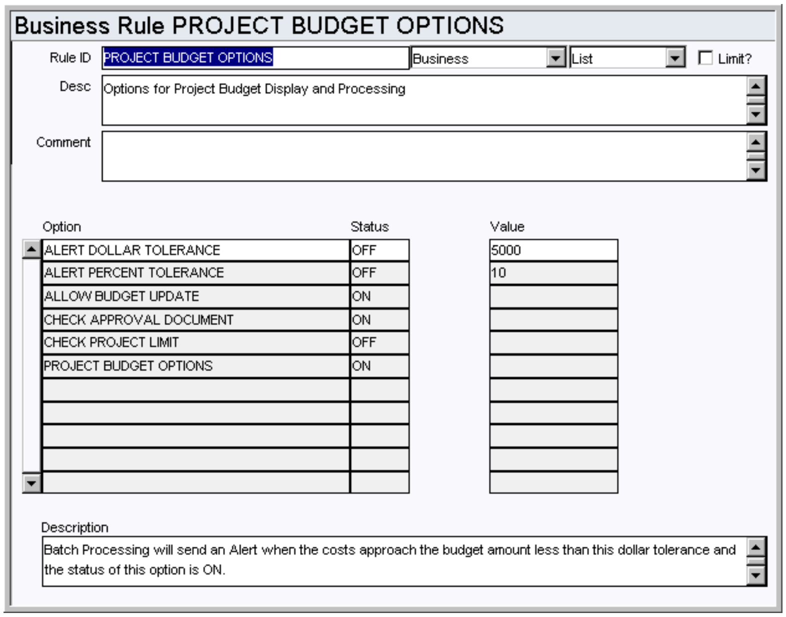
Note: The LOV on the account # will display only valid account #'s, and will substitute the actual Project ID for PROJE .

Account Creation and Option Status

ALLOW AUTO CREATE - controls whether or not an Account Number is automatically created via the Project module. When a Project is created in the Maintenance subsystem, a Project ID is assigned. For each Subproject generated, the user has the opportunity to create an Account Number specifically for that Subproject by listing an Account Number that contains the character string PROJE .

Once the Project/Subproject is approved, the system generates an Account Number in the Account module by replacing the PROJE with the displayed Project ID. Accounts generated in this manner are set to INACTIVE status so that they would not be readily available for use elsewhere in the system.

Project Budget Options Rule



Business Rule PROJECT BUDGET OPTIONS

Rule ID: PROJECT BUDGET OPTIONS | Business | List | ☐ Limit?

Desc: Options for Project Budget Display and Processing

Comment:

Option	Status	Value
ALERT DOLLAR TOLERANCE	OFF	5000
ALERT PERCENT TOLERANCE	OFF	10
ALLOW BUDGET UPDATE	ON	
CHECK APPROVAL DOCUMENT	ON	
CHECK PROJECT LIMIT	OFF	
PROJECT BUDGET OPTIONS	ON	

Description: Batch Processing will send an Alert when the costs approach the budget amount less than this dollar tolerance and the status of this option is ON.

Set options for Project Budget Display and Processing.

Option, Status, and Value

ALERT DOLLAR TOLERANCE - If this option is set to ON the system will send an Alert when Project costs approach the budget amount less than the dollar tolerance entered in the Value field. Referring to the Batch Job Control Business Rule, SDBP_PROJECT_ALERT uses the Project Budget Options Business Rule for determining if a percent and/or dollar tolerance is to be used. The estimated and committed Subprojects costs are compared to the budget amount minus the tolerance. An alert is sent to the Subproject supervisor_name and to the Project project_manager when these costs are above the target amount.

ALERT PERCENT TOLERANCE - If this option is set to ON the system will send an Alert when the costs approach the budget amount less the percent tolerance entered in the Value field or the budget amount. Referring to the Batch Job Control Business Rule, SDBP_PROJECT_ALERT uses the Project Budget Options Business Rule for determining if a percent and/or dollar tolerance is to be used. The estimated and committed Subprojects costs are compared to the budget amount minus the tolerance. An alert is sent to the Subproject supervisor_name and to the Project project_manager when these costs are above the target amount.

ALLOW BUDGET UPDATE - If this option is set to ON, Subproject Budgets can be updated when the Project/Subproject is in Approved status.

CHECK APPROVAL DOCUMENT - This option controls how the system processes approvals for subprojects and for work orders that reference a subproject. Set this rule key to ON if the work order related to the subproject does not require approval after the subproject is approved. Set this to OFF if approval checking for the subproject should be disabled but the resulting work order must go through standard approval processing.

ON - A dollar limit approval authority is required to approve the subproject, but once the subproject is approved the related work order does not require approval checking. With this setting a user without work order approval authority can change the work order status to Approved or Active as long as the subproject has been approved.

Even with this option set to ON the user changing the Work Order status to Approved must still have the responsibility functions WO TO ACTIVE, WO TASK TO ACTIVE and ACTIVATE WO MATERIAL in order to be able to create a Work Order Task where charges can be applied. So there are still checks in place to only allow users with authority to create Work Order Tasks where charges can be applied.

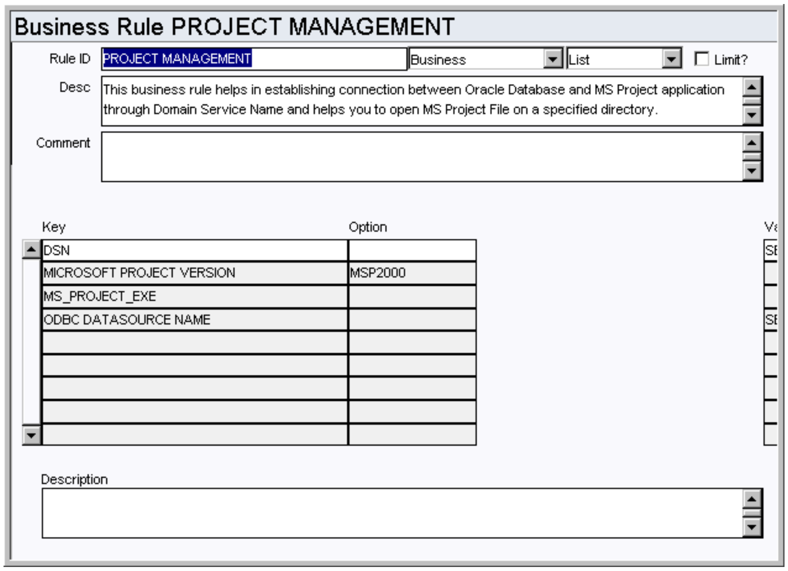
OFF - There is no approval checking on subproject records. Any work order referencing the project/subproject must go through standard processing to obtain approval. With this setting there is no Pending Approval status on Subproject records.

Eliminating Pending Approval status on the project forces planners and approvers to communicate directly regarding the subproject rather than relying on system alerts. This ensures that work orders and subprojects will not be approved haphazardly, yet your organization can benefit from simplified processing.

CHECK PROJECT LIMIT - If this rule key is set to ON the system will verify that the budget amount totals for the Project do not exceed the Project limit when the Subprojects are approved.

PROJECT BUDGET OPTIONS - This rule key controls where the approval of the Project occurs. When set to ON, the approval is at the Subproject level and each subsequent Subproject will be automatically be in CREATED status. When this rule key is set to OFF, the approval is at the Project header level and each Subproject will be created set to APPROVED status when the overall Project is approved.

Project Management Rule



Business Rule PROJECT MANAGEMENT

Rule ID: PROJECT MANAGEMENT

Business

List

☐ Limit?

Desc: This business rule helps in establishing connection between Oracle Database and MS Project application through Domain Service Name and helps you to open MS Project File on a specified directory.

Comment:

Key	Option
DSN	
MICROSOFT PROJECT VERSION	MSP2000
MS_PROJECT_EXE	
ODBC DATASOURCE NAME	

Description:

Establish a connection between Oracle Database and MS Project application through Domain Service Name. You can also set the system to open MS Project Files on a specified directory.

Key, Option, and Value

DSN - Domain Service Name.

MICROSOFT PROJECT VERSION - This key allows you to specify the version of Microsoft Project your organization is using. Options are MSP2000 or MSP98.

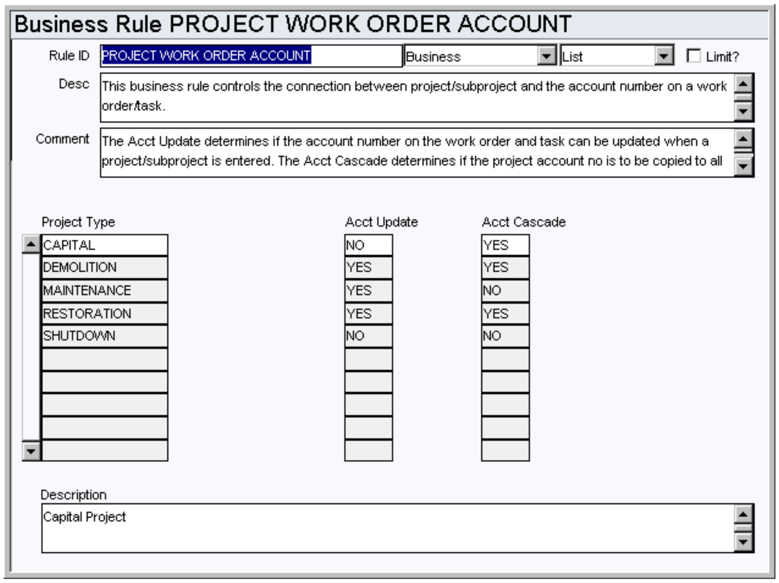
MS_PROJECT_EXE - Launches MS Project.

ODBC DATASOURCE NAME - This rule key was rendered obsolete by changes made to allow use of MS Project without ODBC. It will be removed in a future release.

UPDATE MSP TASK DATES - If this rule key is set to OFF the system will not update MS

Project tables when task records are updated.

Project Work Order Account Rule



Rule ID	PROJECT WORK ORDER ACCOUNT	Business	List	☐ Limit?

Desc: This business rule controls the connection between project/subproject and the account number on a work order/task.

Comment: The Acct Update determines if the account number on the work order and task can be updated when a project/subproject is entered. The Acct Cascade determines if the project account no is to be copied to all

Project Type	Acct Update	Acct Cascade
CAPITAL	NO	YES
DEMOLITION	YES	YES
MAINTENANCE	YES	NO
RESTORATION	YES	YES
SHUTDOWN	NO	NO

Description: Capital Project

Controls the connection between Project/Subproject and the account number on a work order/task.

Project Type

The values entered in this column will be used to build the list of values in the Type field on Subproject records. Some examples of types of projects are: Capital, Maintenance, or Shutdown. Once project types are created, define distinct settings for each type of project by setting values in the Account Update and Account Cascade fields.

If the Account Update key value is set to YES and Account Cascade is also set to YES then when a new Task is added to a Work Order and the Asset ID is changed (or defaulted from the previous Task) the account number will be copied from the Asset ID along with the Department and Area.

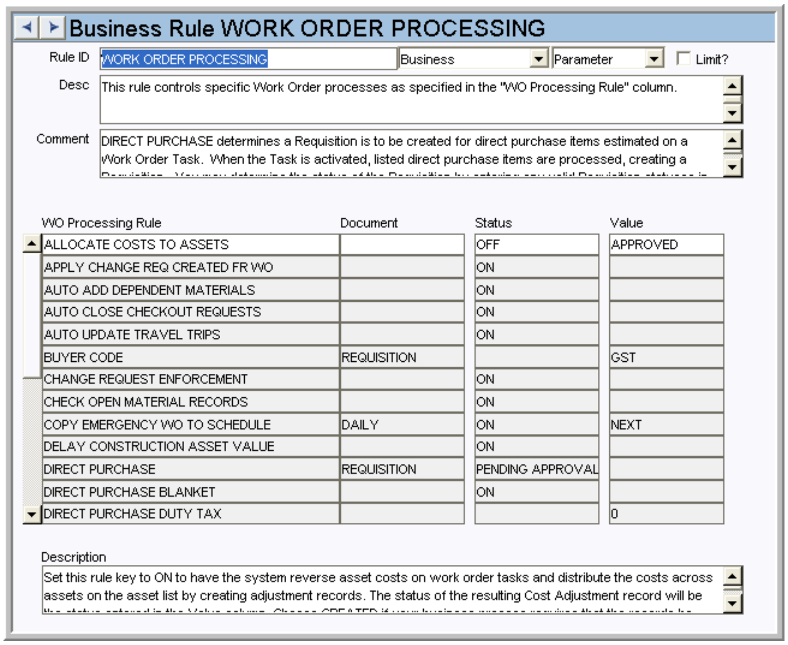
Acct Update

The Acct Update determines if the account number on the work order and task can be updated. The system automatically overrides the asset account number with the Subproject account number when you fill in the Subproject ID. If set to Yes, this rule key allows you to override that functionality and change the account number back to the asset account number.

Acct Cascade

The Acct Cascade determines if the Project Account No. is to be copied to all of the work order tasks when the work order is activated.

Work Order Processing Rule



Business Rule WORK ORDER PROCESSING

Rule ID: WORK ORDER PROCESSING | Business | Parameter | ☐ Limit?

Desc: This rule controls specific Work Order processes as specified in the "WO Processing Rule" column.

Comment: DIRECT PURCHASE determines a Requisition is to be created for direct purchase items estimated on a Work Order Task. When the Task is activated, listed direct purchase items are processed, creating a

WO Processing Rule	Document	Status	Value
ALLOCATE COSTS TO ASSETS		OFF	APPROVED
APPLY CHANGE REQ CREATED FR WO		ON	
AUTO ADD DEPENDENT MATERIALS		ON	
AUTO CLOSE CHECKOUT REQUESTS		ON	
AUTO UPDATE TRAVEL TRIPS		ON	
BUYER CODE	REQUISITION		GST
CHANGE REQUEST ENFORCEMENT		ON	
CHECK OPEN MATERIAL RECORDS		ON	
COPY EMERGENCY WO TO SCHEDULE	DAILY	ON	NEXT
DELAY CONSTRUCTION ASSET VALUE		ON	
DIRECT PURCHASE	REQUISITION	PENDING APPROVAL	
DIRECT PURCHASE BLANKET		ON	
DIRECT PURCHASE DUTY TAX			0

Description: Set this rule key to ON to have the system reverse asset costs on work order tasks and distribute the costs across assets on the asset list by creating adjustment records. The status of the resulting Cost Adjustment record will be

Determine whether or not labor markup information is included in the Cost Summary view.

WO Processing Rule, Document, Status and Value

LABOR MARKUP ON COST SUMMARY - This key determines if labor markup transactions are included in the Cost Summary views in the Work Order and Project / Subproject modules. Set the value to ON to include the M1, M2 and M3 Labor Markup Transaction Codes in the Cost Summary views. Set the value to OFF if you do not want to include the labor markup values. The default setting is OFF.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Allow WO Project Update

Allows users to update the Project / Subproject on Active Work Orders as long as there are no “Actual” costs for that Work Order.

Project Closed to Finished

Grants the ability to change the status of a Project from CLOSED to FINISHED.

Project Finished to Closed

Grants the ability to change the status of a Project from FINISHED to CLOSED.

Project Management

Grants access to the Project Management view in the in the Project/Subproject module.

Subproject Approved to Created

Grants the ability to change the status of a Subproject from APPROVED to CREATED.

Subproject Finished to Approved

Grants the ability to change the status of a Subproject from FINISHED to APPROVED.

Batch Processes

Project Alert - sdbp_project_alert;

Uses the Project Budget Options Business Rule for determining if a percent and/or dollar tolerance is to be used. The estimated and committed subprojects costs are compared to the budget amount minus the tolerance. An alert is sent to the subproject supervisor_name and to the project project_manager when these costs are above the target amount.

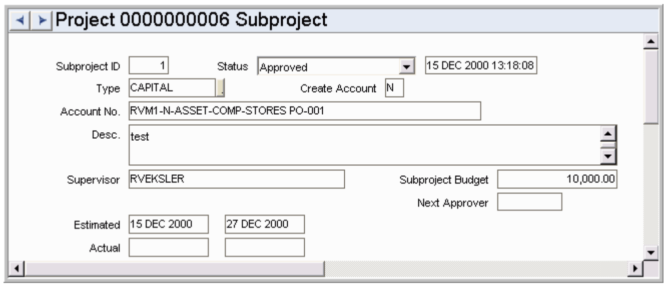
Charts

S_CHT149 - Project Analysis

The Budget Amount, Original Estimate, Revised Estimate, Committed Costs, and Actual Amount for Projects. The data can be filtered by Plant and Project Status.

Views

Subproject



Project 0000000006 Subproject

Subproject ID: 1
Status: Approved
15 DEC 2000 13:18:08
Type: CAPITAL
Create Account: N
Account No.: RVM1-N-ASSET-COMP-STORES PO-001
Desc.: test
Supervisor: RVEKSLER
Subproject Budget: 10,000.00
Next Approver:
Estimated: 15 DEC 2000 27 DEC 2000
Actual:

Microsoft Project Interface

The Microsoft Project Interface is not certified for use in the Web environment. The Project/Subproject module includes a View that provides an interface between the Oracle Utilities Work and Asset Management system and the Microsoft Windows based application, MS Project. You can use wizards on the Actions list in the Project/ Subproject module to export Project information to MS Project and to launch MS Project. Users should be aware that changes made in MS Project can not be exported back into the system. Any tasks that are created or deleted in MS Project as well as dates that are changed will not be reflected in the system. Any modifications that need to be made to the project should be made in the system then exported to MSProject. The system should be configured in the Project Management business rule and the Default File Locations business rule. to ensure that this interface works properly.

Project Management Configuration

Before the Project Management interface can be used, Microsoft Project must be installed on each user computer, and the Default File Locations business rule must be configured with the location of the MS Project program file.

A typical path is entered during the installation process, but your DBA or System Administrator should verify that it is correct and change it if necessary.

The system is certified for MS Project 2003 and 2007.

Configuring in User Profile

If not all users have Microsoft Project installed in the same directory, individual users can override the path specified in the business rule by inserting an alternate path in their User

Profile. To do this, open the User Profile and insert a new key name, selecting 'Default MS Project Path' from the drop-down list. Then enter the complete path (including the name of the executable file) as Key Value 4, and save the record.

Report Output

While it is not necessary to configure, it is useful to note that the Report Output Physical Directory rule key in the Web Configuration Business rule indicates the physical location where the output of the generated xml file is temporarily stored when data is transferred from the Project/Subproject module to the MS Project application.

Runtime Entry Module

Meter readings can be entered in the Runtime Entry, Task Closeout, PM Master, Consumables modules or through an external interface. Information collected here is automatically used to update PM Master run-time based records (for the listed asset and run-time type).

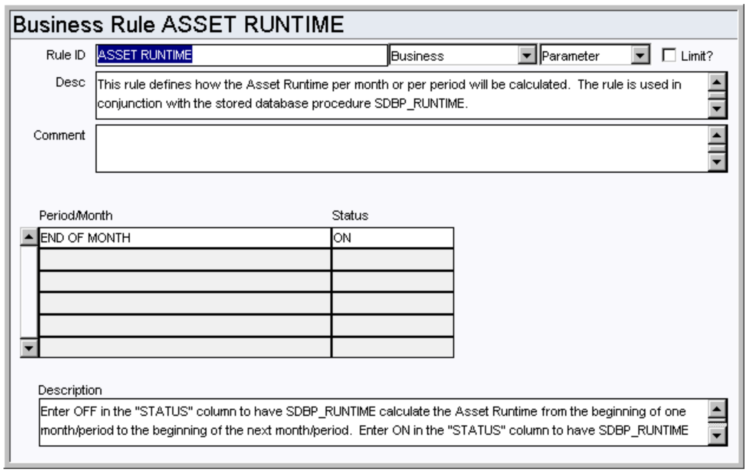
Code Tables

Code Table 107: Meter Units

Meter Units column - Define valid names for the types of measurement units that can be metered and tracked to determine asset operation.

Business Rules

Asset Runtime Rule



Business Rule ASSET RUNTIME

Rule ID: ASSET RUNTIME — Business — Parameter — ☐ Limit?

Desc: This rule defines how the Asset Runtime per month or per period will be calculated. The rule is used in conjunction with the stored database procedure SDBP_RUNTIME.

Comment:

Period/Month	Status
END OF MONTH	ON

Description: Enter OFF in the "STATUS" column to have SDBP_RUNTIME calculate the Asset Runtime from the beginning of one month/period to the beginning of the next month/period. Enter ON in the "STATUS" column to have SDBP_RUNTIME

Define how the Asset Runtime per month or per period will be calculated. The rule is used in conjunction with the stored database procedure SDBP_RUNTIME.

Period/Month and Status

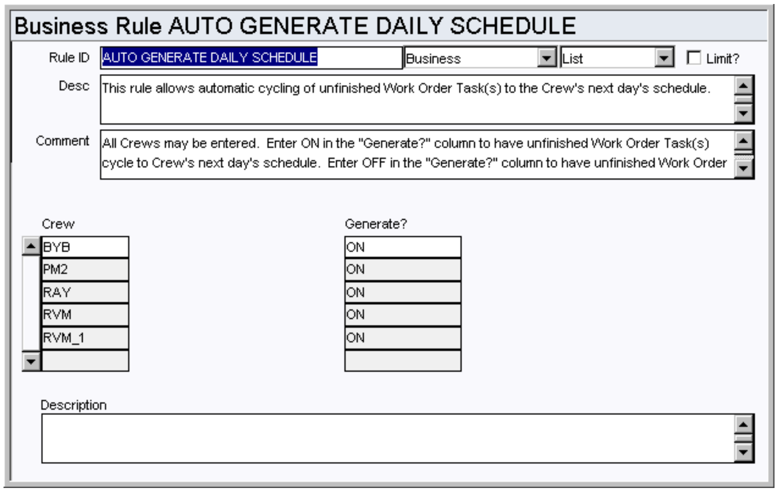
ALLOW LOWER RUNTIME - This key only affects assets with depreciation method of Units of Production. A Status of YES allows entry of a reading lower than or equal to the last reading. A Status of NO only allows entry of a reading higher than the last reading.

END OF MONTH - Entering ON or OFF in the status determines the period of time the SDBP_RUNTIME calculates the Asset Runtime from. ON calculates from the end of one month or period to the end of the next month or period. OFF calculates from the beginning of one month or period to the beginning of the next month or period.

Daily Schedule Module

Business Rules

Auto Generate Daily Schedule Rule



Business Rule AUTO GENERATE DAILY SCHEDULE

Rule ID: AUTO GENERATE DAILY SCHEDULE | Business | List | ☐ Limit?

Desc: This rule allows automatic cycling of unfinished Work Order Task(s) to the Crew's next day's schedule.

Comment: All Crews may be entered. Enter ON in the "Generate?" column to have unfinished Work Order Task(s) cycle to Crew's next day's schedule. Enter OFF in the "Generate?" column to have unfinished Work Order

Crew	Generate?
BYB	ON
PM2	ON
RAY	ON
RVM	ON
RVM_1	ON

Description

Control automatic cycling of unfinished work order tasks to the crew's next day's schedule.

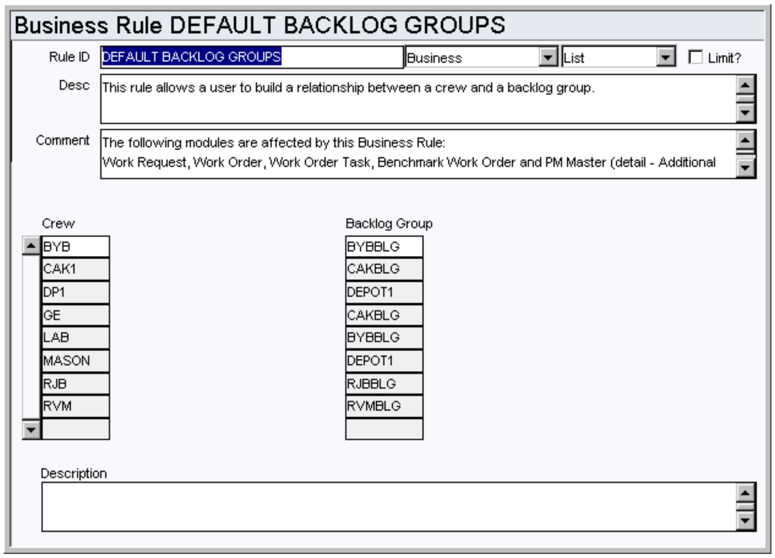
When the sdbp_reschedule.job_reschedule batck job is run, work order tasks that are in ACTIVE status are placed on the next day's schedule for that task's crew. Schedules are generated according to the days and hours entered in the Crew Daily Hours view of the Crew module.

Note: The Automatic Scheduling feature only applies to ACTIVE work order tasks. If you are using the Scheduling modules to schedule PLANNED (or non-active) work order tasks, you must manually move the work tasks to future schedules. This is due to the fact that the "completion" of a PLANNED work order task does not result in the work order task being FINISHED or CANCELED. The Automatic Scheduling option would continue to rollover the work order task to the Planners schedule until work was actually finished.

Crew / Generate

Enter any valid crew that exists in the Crew module then enter ON or OFF in the Generate column to determine whether or not the system should cycle unfinished work order tasks to the crew's next day's schedule. Any crew that is not listed will be defaulted to OFF and no schedules will be created automatically for that crew. Schedules are generated according to the days and hours entered in the Crew Daily Hours view of the Crew module.

Default Backlog Groups Rule



Business Rule DEFAULT BACKLOG GROUPS

Rule ID: DEFAULT BACKLOG GROUPS — Business — List — ☐ Limit?

Desc: This rule allows a user to build a relationship between a crew and a backlog group.

Comment: The following modules are affected by this Business Rule:
Work Request, Work Order, Work Order Task, Benchmark Work Order and PM Master (detail - Additional

Crew	Backlog Group
BYB	BYBBLG
CAK1	CAKBLG
DP1	DEPOT1
GE	CAKBLG
LAB	BYBBLG
MASON	DEPOT1
RJB	RJBBLG
RVM	RVMBLG

Description

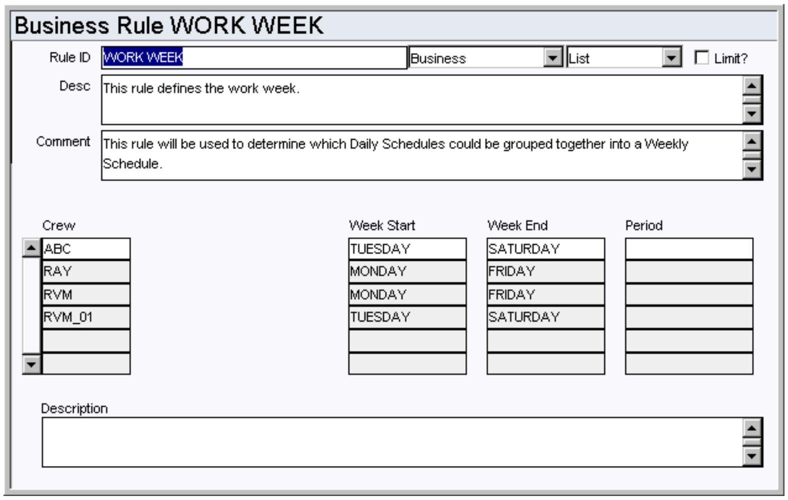
Build a relationship between crews and backlog groups (sometimes called backlog crews) for Work Requests, Work Order Tasks, Benchmark Work Order Tasks, PM Masters, and on Schedules.

An example of how the concept of a backlog crew may be used is that Crew A (Crew) works 1st shift and Crew B (Backlog Group) works 2nd or 3rd shift and takes on any unfinished tasks originally scheduled for Crew A (Crew) on 1st shift.

Crew and Backlog Group

Enter the crews and the associated Backlog Groups for each in the appropriate columns.

Work Week Rule



Business Rule WORK WEEK

Rule ID: WORK WEEK — Business — List — ☐ Limit?

Desc: This rule defines the work week.

Comment: This rule will be used to determine which Daily Schedules could be grouped together into a Weekly Schedule.

Crew	Week Start	Week End	Period
ABC	TUESDAY	SATURDAY	
RAY	MONDAY	FRIDAY	
RVM	MONDAY	FRIDAY	
RVM_01	TUESDAY	SATURDAY	

Description

Define the workweek.

This rule is used to define the days of the week that a crew is available to be scheduled in a work week.

Crew

Enter into the CREW column the crew name.

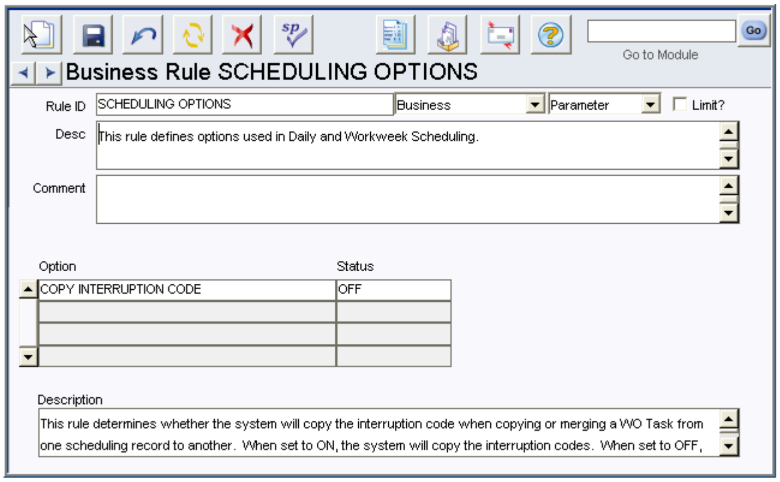
Week Start and Week End

The WEEK START and WEEK END columns dictate the start of the workweek and the end of the work week for each crew listed in the CREW column.

Period

This column will be available in a future release.

Scheduling Options Rule



Business Rule SCHEDULING OPTIONS

Rule ID	SCHEDULING OPTIONS	Business	Parameter	☐ Limit?
Desc	This rule defines options used in Daily and Workweek Scheduling.			
Comment				

Option	Status
COPY INTERRUPTION CODE	OFF

Description

This rule determines whether the system will copy the interruption code when copying or merging a WO Task from one scheduling record to another. When set to ON, the system will copy the interruption codes. When set to OFF,

This rule defines options used in Daily and Workweek Scheduling.

Copy Interruption Code

This rule determines whether the system will copy the interruption code when copying or merging a WO Task from one scheduling record to another. When set to ON, the system will copy the interruption codes. When set to OFF, the system will not copy the interruption codes.

Code Tables

Code Table 1190: Daily Schedule Types

Type field - Use this code to define the types of schedules that can be created. Typically these types describe the work to be done, however codes can be set to describe any schedule type.

Code Table 2501: Interruption Codes

Interruption Code field - Interruption codes are mainly used for compliance tracking to identify what occurred to impact the planned schedule.

Batch Processes

Reschedule - sdbp_reschedule.job_reschedule;

Reviews all active work order tasks which are unfinished and places them on the Daily and / or Weekly Schedules as defined in the Auto Generate Daily Schedule and Auto Generate Weekly Schedule Rules. Work Order which were just generated by PM Master processing will also be placed on the Daily / Weekly Schedule.

PM Cycle - sdbp_pm_cycle_job.start_job;

Reviews active PM Masters and cycles those that are due, creating work orders in the status defined in the PM Master Parameters Business Rule. If the PM is being cycled and the Benchmark’s component is no longer installed on the Benchmark’s asset, the system generates a work order with the asset from the Benchmark and will not bring over the component.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Activate Checkout Request from Schedule

Users with this responsibility will have available a column of check boxes in the Checkout Request view of the Daily Schedule module as well as an action which allows uses to activate the checkout requests from the scheduling record.

Merge Task WOWeek to Day Schd

Grants access to the Merge All Tasks to Daily Schedule and Merge Selected Tasks to Daily Schedule. The actions allow users to copy or move the tasks to specified Daily Schedule records.

Reports

S_RPT152 - Daily Schedule Assignments Report

Lists employees and the work orders that are assigned to them on the selected day.

S_RPT041 - Daily Schedule Report

Lists the work order tasks scheduled for a selected day.

Installation Parameters

SCHEDULING TOTAL EST HRS DISP

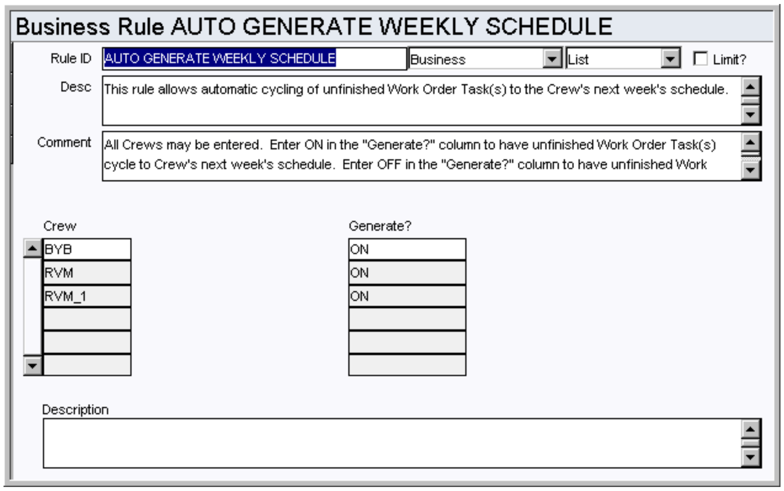
ON/OFF

If set to ON, will display Total Hours Scheduled and Labor Estimate for each craft within the Daily and Workweek Scheduling modules.

Workweek Schedule Module

Business Rules

Auto Generate Weekly Schedule Rule



Business Rule AUTO GENERATE WEEKLY SCHEDULE

Rule ID: AUTO GENERATE WEEKLY SCHEDULE | Business | List | ☐ Limit?

Desc: This rule allows automatic cycling of unfinished Work Order Task(s) to the Crew's next week's schedule.

Comment: All Crews may be entered. Enter ON in the "Generate?" column to have unfinished Work Order Task(s) cycle to Crew's next week's schedule. Enter OFF in the "Generate?" column to have unfinished Work

Crew	Generate?
BYB	ON
RVM	ON
RVM_1	ON

Description:

The Auto Generate Weekly Schedule Rule allows automatic cycling of unfinished Work Order Task(s) to the Crew's next week's schedule.

When the sdbp_reschedule.job_reschedule batck job is run, work order tasks that are in ACTIVE status are placed on the next week's schedule for that task's crew. Schedules are generated according to the days and hours entered in the Work Week business rule.

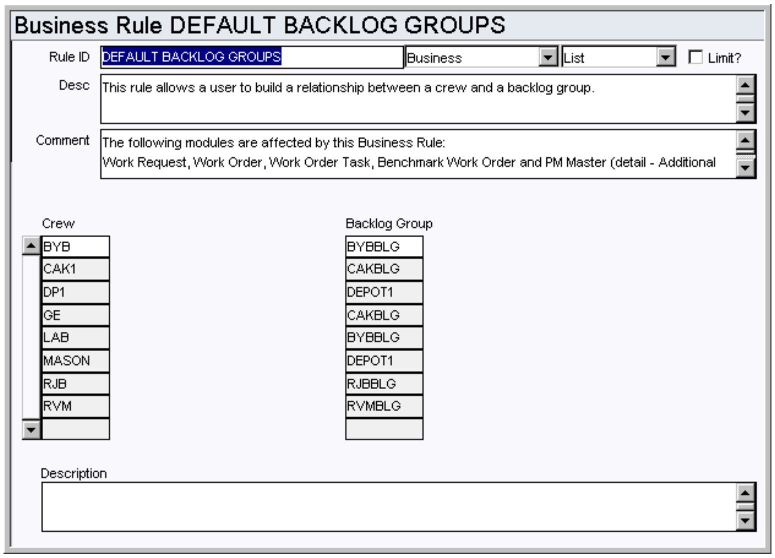
Note: The Automatic Scheduling feature only applies to ACTIVE work order tasks. If you are using the Scheduling modules to schedule PLANNED (or non-active) work order tasks, you must manually move the work tasks to future schedules. This is due to the fact that the "completion" of a PLANNED work order task does not result in the work order task being FINISHED or CANCELED. The Automatic Scheduling option would continue to rollover the work order task to the Planners schedule until work was actually finished.

Crew / Generate

Enter any valid crew that exists in the Crew module then enter ON or OFF in the Generate column to determine whether or not the system should cycle unfinished work order tasks to the crew's next week's schedule.

Any crew that is not listed will be defaulted to OFF and no schedules will be created automatically for that crew. Schedules are generated according to the values entered in the Work Week business rule.

Default Backlog Groups Rule



Business Rule DEFAULT BACKLOG GROUPS

Rule ID: DEFAULT BACKLOG GROUPS | Business | List | ☐ Limit?

Desc: This rule allows a user to build a relationship between a crew and a backlog group.

Comment: The following modules are affected by this Business Rule:
Work Request, Work Order, Work Order Task, Benchmark Work Order and PM Master (detail - Additional

Crew	Backlog Group
BYB	BYBBLG
CAK1	CAKBLG
DP1	DEPOT1
GE	CAKBLG
LAB	BYBBLG
MASON	DEPOT1
RJB	RJBBLG
RVM	RVMBLG

Description:

The Default Backlog Group business rule allows a user to build a relationship between a crew and a backlog group for Work Requests, Work Order Tasks, Benchmark Work Order Tasks, PM Masters, and schedules.

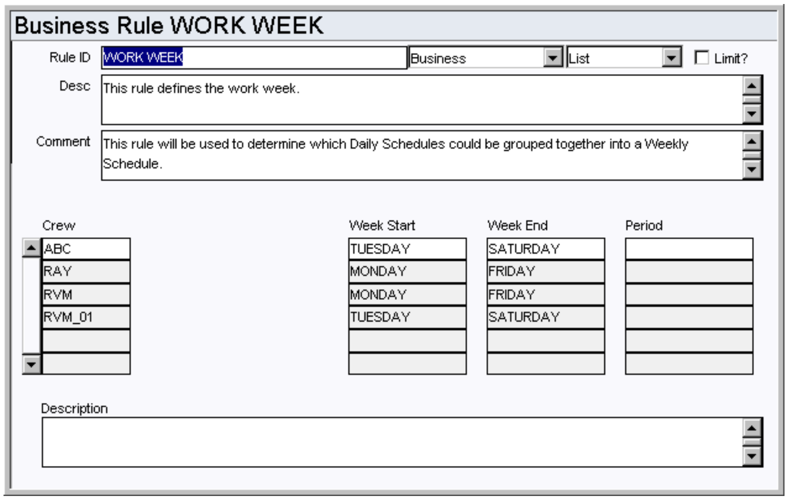
An example of how the concept of a backlog crew may be used is that Crew A (Crew) works 1st shift and Crew B (Backlog Group) works 2nd or 3rd shift and takes on any unfinished tasks originally scheduled for Crew A (Crew) on 1st shift.

Crew and Backlog Group

Enter valid Crew codes (Code Table 15) in the Crew column. In the Backlog Group column enter Backlog Group codes (Code Table 110) associated with the Crew.

Work Week Rule

Define the workweek.



Business Rule WORK WEEK

Rule ID: WORK WEEK | Business | List | ☐ Limit?

Desc: This rule defines the work week.

Comment: This rule will be used to determine which Daily Schedules could be grouped together into a Weekly Schedule.

Crew	Week Start	Week End	Period
ABC	TUESDAY	SATURDAY	
RAY	MONDAY	FRIDAY	
RVM	MONDAY	FRIDAY	
RVM_01	TUESDAY	SATURDAY	

Description:

This rule is used to define the days of the week that a crew is available to be scheduled in a work week.

Crew

Enter into the CREW column the crew name.

Week Start and Week End

The WEEK START and WEEK END columns dictate the start of the workweek and the end of the work week for each crew listed in the CREW column.

Period

This column will be available in a future release.

Code Tables

Code Table 2500: Daily Schedule Types

Type field - Define the types of schedules that can be created. Typically these types describe the work to be done, however codes can be set to describe any schedule type.

Code Table 2501: Interruption Codes

Interruption Code field - Interruption codes are mainly used for compliance tracking to identify what occurred to impact the planned schedule.

Batch Processes

Reschedule - sdbp_reschedule.job_reschedule;

Reviews all active work order tasks which are unfinished and places them on the Daily and / or Weekly Schedules as defined in the Auto Generate Daily Schedule and Auto Generate Weekly Schedule Rules. Work Order which were just generated by PM Master processing will also be placed on the Daily / Weekly Schedule.

PM Cycle - sdbp_pm_cycle_job.start_job;

Reviews active PM Masters and cycles those that are due to create work orders. The new work order status is defined in the PM Master Parameters Business Rule. If the PM is being cycled and the Benchmark's component is no longer installed on the Benchmark's asset, the system generates a work order with the asset from the Benchmark and will not bring over the component.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Merge Task WOWeek to Day Schd

Grants access to the Merge All Tasks to Daily Schedule and Merge Selected Tasks to Daily Schedule. The actions allow users to copy or move the tasks to specified Daily Schedule records.

Installation Parameters

SCHEDULING TOTAL EST HRS DISP

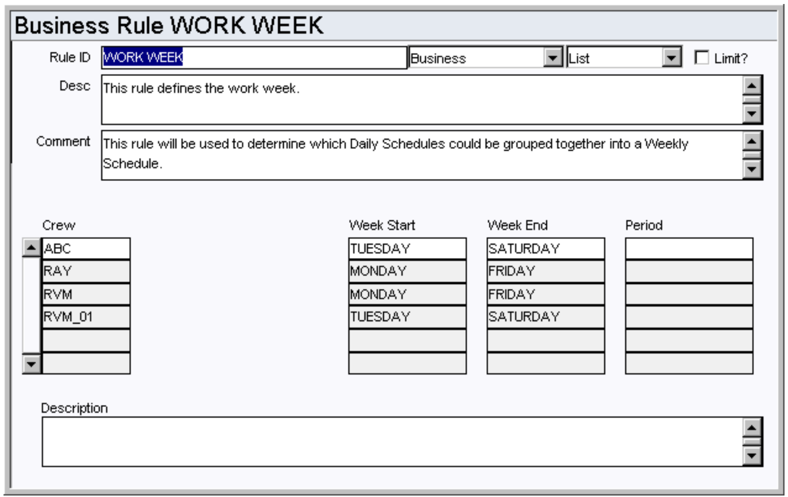
ON/OFF

If set to ON, will display Total Hours Scheduled and Labor Estimate for each craft within the Daily and Workweek Scheduling modules.

Schedule Plan Module

Business Rules

Work Week Rule



Business Rule WORK WEEK

Rule ID: WORK WEEK | Business | List | ☐ Limit?

Desc: This rule defines the work week.

Comment: This rule will be used to determine which Daily Schedules could be grouped together into a Weekly Schedule.

Crew	Week Start	Week End	Period
ABC	TUESDAY	SATURDAY	
RAY	MONDAY	FRIDAY	
RVM	MONDAY	FRIDAY	
RVM_01	TUESDAY	SATURDAY	

Description:

The Work Week Rule defines the days of the week that a crew is available to be scheduled in a work week. This determines which Daily Schedules can be grouped together into a Workweek Schedule.

Crew

Enter the crew name in the Crew column.

Week Start and Week End

The WEEK START and WEEK END columns dictate the start of the work week and the end of the work week for each crew listed in the CREW column.

Period

This column will be available in a future release.

Reports

S_RPT153 - Schedule Plan Report

Provides a listing of the crew plans in a schedule plan along with the associated daily plans and work order tasks. The report also shows the hours and crafts assigned for each task.

Direct Charges Module

Fields

Sequence No.: Direct Charges No.

The record number is comprised of a unique ID (Ex. “010000066”). Direct Charge record numbers are typically set to be system generated.

> **TABLE NAME** - SA_DIRECT_CHARGES- The sequence number is generated for this database table.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate approvers for Direct Charges in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Owner Field

The Credit Card Info View of User Profile module is used to populate the list of values for the Owner field in the Direct Charges module.

Note: You must be logged in as the user to insert, view or update credit card information for each user. This data can also be entered through data migration.

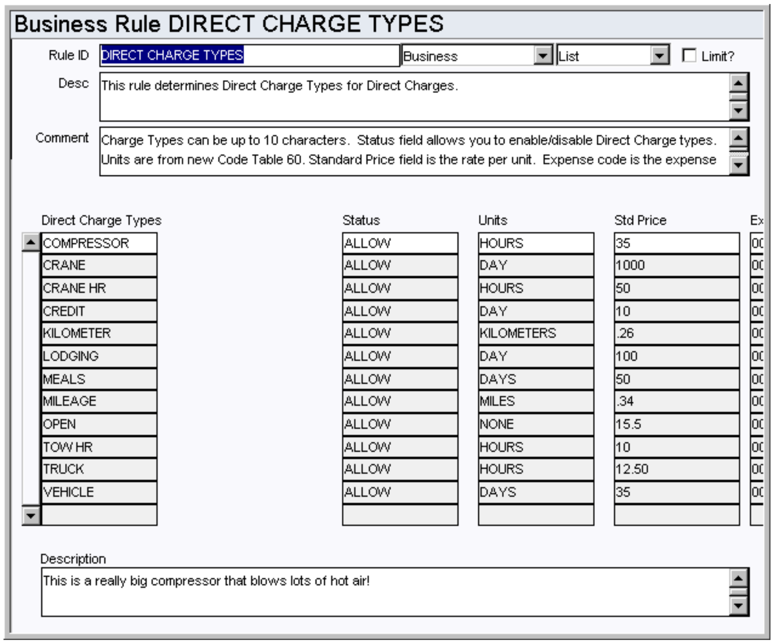
Code Tables

Code Table 550: Direct Charge Category Codes

Category Field - Define categories for direct charges. Examples include Personal (to be used for reimbursement for business trips), Maintenance (to be used for Maintenance related Credit Card Purchases), Inventory (to be used for Inventory related Credit Card Purchases), Equipment (to be used for all equipment rentals) etc.

Business Rules

Direct Charge Types Rule



Business Rule DIRECT CHARGE TYPES

Rule ID: DIRECT CHARGE TYPES | Business | List | ☐ Limit?

Desc: This rule determines Direct Charge Types for Direct Charges.

Comment: Charge Types can be up to 10 characters. Status field allows you to enable/disable Direct Charge types. Units are from new Code Table 60. Standard Price field is the rate per unit. Expense code is the expense

Direct Charge Types	Status	Units	Std Price
COMPRESSOR	ALLOW	HOURS	35
CRANE	ALLOW	DAY	1000
CRANE HR	ALLOW	HOURS	50
CREDIT	ALLOW	DAY	10
KILOMETER	ALLOW	KILOMETERS	.26
LODGING	ALLOW	DAY	100
MEALS	ALLOW	DAYS	50
MILEAGE	ALLOW	MILES	.34
OPEN	ALLOW	NONE	15.5
TOW HR	ALLOW	HOURS	10
TRUCK	ALLOW	HOURS	12.50
VEHICLE	ALLOW	DAYS	35

Description: This is a really big compressor that blows lots of hot air!

Determines Direct Charge Types for Direct Charges.

Units are from new Code Table 60. Standard Price field is the rate per unit. Expense code is the expense code to charge (from EXPENSE CODE Business Rule).

Direct Charge Types

Enter the Charge Type codes into the DIRECT CHARGE TYPE column. Examples: Meals, Mileage, Rental. The Type Code can be up to 10 characters long.

Status

The STATUS column of each DIRECT CHARGE TYPE must be set to ALLOW or DISALLOW to enable or disable the use of each Type code.

Units

The Lists of Values for the Units fields reference Code Table 60 where Direct Charge Type Units are defined. Select the appropriate Unit code for each Direct Charge type.

Standard Price

Enter the STD PRICE rate for each type of Direct Charge.

Expense Code

Enter in the EXPENSE CODE column the specific expense code, if applicable, associated with this Direct Charge type. EXPENSE CODES are defined in the EXPENSE CODE Business Rule.

Processing

Default is set to STANDARD, but if the value is changed to OPEN, then that gives the users the ability to update the Standard Price and Amount fields on the Direct Charges Item.

Batch Processes

Direct Charges - sdbp_direct_charges.direct_charges;

Processes approved Direct Charges costs which have not yet been posted, and creates new entries in the Direct Charges Log.

Cost and Closeout - smu_interface.sdbp_mu_interface (job_in, plant_in,'N');
Processes transactions entered in cost and closeout.

Copy Record

ODC - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Cost and Closeout

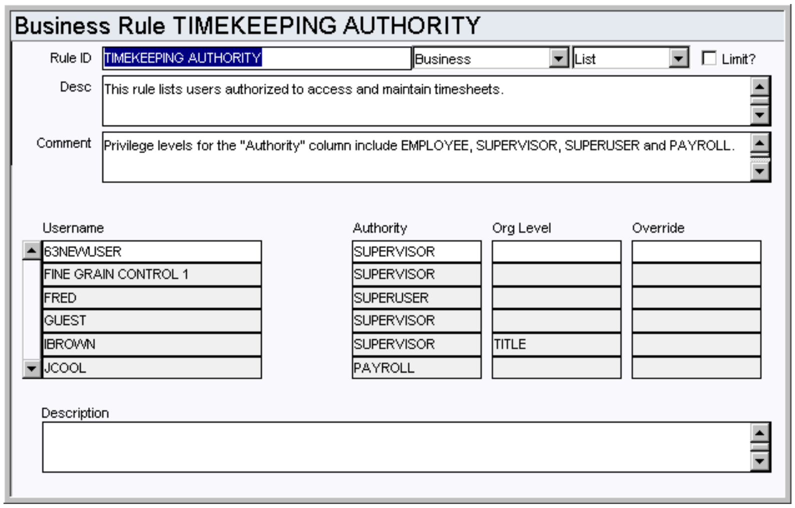
Adds the Cost and Closeout action to the user's home page action list.

Leave Request Module

Business Rules

Timekeeping Authority Rule

Lists users authorized to access and maintain timesheets, leave requests, and employee records. This rule only controls who has access to the records, approval authorization is controlled in the Approval Limits module.



Business Rule TIMEKEEPING AUTHORITY

Rule ID: TIMEKEEPING AUTHORITY | Business | List | ☐ Limit?

Desc: This rule lists users authorized to access and maintain timesheets.

Comment: Privilege levels for the "Authority" column include EMPLOYEE, SUPERVISOR, SUPERUSER and PAYROLL.

Username	Authority	Org Level	Override
63NEWUSER	SUPERVISOR		
FINE GRAIN CONTROL 1	SUPERVISOR		
FRED	SUPERUSER		
GUEST	SUPERVISOR		
IBROWN	SUPERVISOR	TITLE	
JCOOL	PAYROLL		

Description:

Username

Enter Usernames or DEFAULT in this field. If you list individual usernames, only those users listed will have access to the timesheets controlled by the corresponding privilege level in the AUTHORITY column. If you use DEFAULT, all users will have the timesheet privilege listed in the corresponding AUTHORITY column. For example: By setting the USERNAME column to DEFAULT and the AUTHORITY column to SUPERVISOR, all users will be granted SUPERVISOR privilege without having to identify them explicitly.

Authority

The Authority column defines the scope of a users' authority. The authority levels include: Employee, Supervisor, Superuser and Payroll.

EMPLOYEE - User can only view or modify their own timesheet. Org Level does not apply.

SUPERVISOR - User can view or modify their own timesheet and timesheets of members of the Org Level entered. The default Org Level is CREW but can be changed.

SUPERUSER - User can view or modify any timesheet. The default Org Level is <BLANK> for all levels but can be changed.

PAYROLL - User can view or modify any timesheet, as well as override or adjust Compensatory Time Accrual calculations. Org Level does not apply.

Org Level

Used to widen or narrow the scope of the users' authority. Valid values are Crew, Department, Area and <Blank>.

CREW - User is limited to those timesheets belonging to his or her CREW. This is the default setting for SUPERVISOR.

AREA - User is limited to those timesheets belonging to his or her Area.

DEPARTMENT - User is limited to those timesheets belonging to his or her Department.

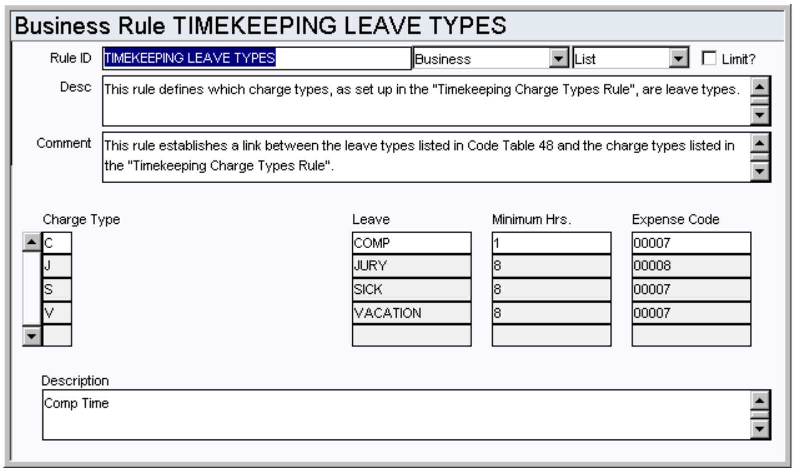
<BLANK> - User has authority to all levels.

Override
You can use this field to temporarily override the authority for a rule key.

Timekeeping Leave Types Rule

Define which of the charge types set up in the Timekeeping Charge Types Rule are Leave Types.

This rule establishes a link between the leave types listed in Code Table 48 and the charge types listed in the Timekeeping Charge Types Rule.



Business Rule TIMEKEEPING LEAVE TYPES

Rule ID: TIMEKEEPING LEAVE TYPES | Business | List | ☐ Limit?

Desc: This rule defines which charge types, as set up in the "Timekeeping Charge Types Rule", are leave types.

Comment: This rule establishes a link between the leave types listed in Code Table 48 and the charge types listed in the "Timekeeping Charge Types Rule".

Charge Type	Leave	Minimum Hrs.	Expense Code
C	COMP	1	00007
J	JURY	8	00008
S	SICK	8	00007
V	VACATION	8	00007

Description: Comp Time

Charge Type
Items listed in the CHARGE TYPE column are directly linked to the Leave Types listed in Code Table 48, used in the Leave Summary and Scheduled Leave details under the Employee module, and the Timekeeping Charge Types Rule. For these Leave Types to be available, the STATUS column of the Timekeeping Charge Types Rule must be set to ALLOW.

Leave
This column is a description of the values listed in the CHARGE TYPE column

Minimum Hours
Enter in the MINIMUM HOURS column the number of hours an employee must work before beginning to accrue CHARGE TYPE hours.

Expense Code
Enter in the EXPENSE CODE column the specific expense code, if applicable, associated with this leave type.

Code Tables

Code Table 48: Leave Reason Codes

Reason column - Define leave reason codes. Codes might include Maternity, Sick, Vacation, etc.

Copy Record

LEAVEREQ - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Batch Processes

Leave Request - sdbp_post_leave;

Posts Leave Requests and creates timesheets for approved Leave Requests that have the Create Timesheet indicator checked and are in an open Pay Period.

Create New Leave Year sdbp_create_new_leave_year.new_leave_year;

Inserts leave records once per year for all employee records into the Employee Leave detail, carrying over remaining leave information from the previous year.

Reports

S_RPT065 - Employee Pay Period Time Report

Provides an Employee Timesheet for a specific pay period.

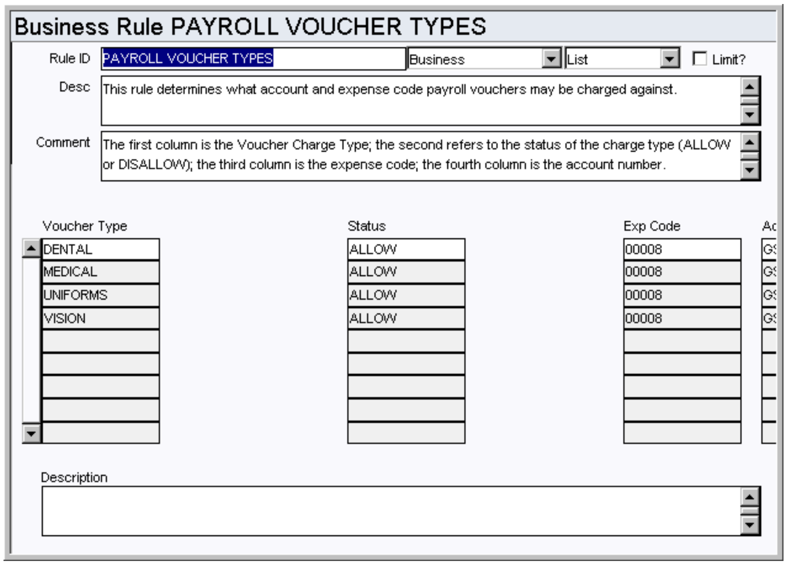
Payroll Voucher Module

The Payroll Voucher module is non-standard and is usually turned off.

Business Rules

Payroll Voucher Types Rule

Determines the account and expense code that payroll vouchers can be charged against.



Rule ID: PAYROLL VOUCHER TYPES | Business | List | ☐ Limit?

Desc: This rule determines what account and expense code payroll vouchers may be charged against.

Comment: The first column is the Voucher Charge Type; the second refers to the status of the charge type (ALLOW or DISALLOW); the third column is the expense code; the fourth column is the account number.

Voucher Type	Status	Exp Code	Ac
DENTAL	ALLOW	00008	G
MEDICAL	ALLOW	00008	G
UNIFORMS	ALLOW	00008	G
VISION	ALLOW	00008	G

Description:

Options

The first column is the Voucher Charge Type, the second column refers to the status of the charge type (ALLOW or DISALLOW), the third column is the expense code; and the fourth column is the account number.

Enter the desired values under each column for the Voucher Types.

Batch Processes

Payroll Voucher - sdbp_pay_voucher.pay_voucher;

Processes approved payroll vouchers which have not yet been posted. Once a payroll voucher is successfully processed, it is marked as posted.

Timekeeping Module

Fields

Next Approver Field

Designate approvers for Timesheet records in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Code Tables

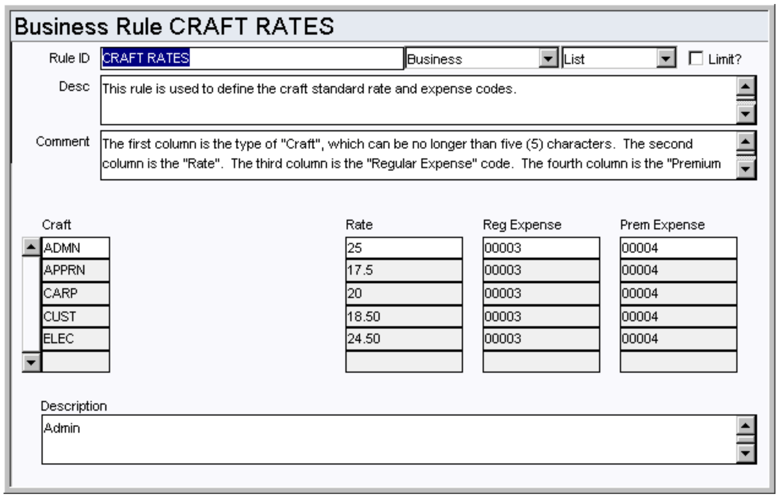
Code Table 310: Supervisor Title

Supervisor field - Define the supervisor titles to be used for various records. These codes define a supervisory position, not a specific person. Some examples of titles are Head Supervisor, Maintenance Supervisor, and Foreman.

Business Rules

Craft Rates Rule

Define Craft codes along with associated wage rates and expense codes.



Business Rule CRAFT RATES

Rule ID: CRAFT RATES | Business | List | ☐ Limit?

Desc: This rule is used to define the craft standard rate and expense codes.

Comment: The first column is the type of "Craft", which can be no longer than five (5) characters. The second column is the "Rate". The third column is the "Regular Expense" code. The fourth column is the "Premium

Craft	Rate	Reg Expense	Prem Expense
ADMN	25	00003	00004
APPRN	17.5	00003	00004
CARP	20	00003	00004
CUST	18.50	00003	00004
ELEC	24.50	00003	00004

Description: Admin

Craft

Classify job types in the Craft field. Examples are ENG for engineer or MECH for mechanic.

Rate

This parameter sets the wage rate for the Craft listed.

Reg Expense

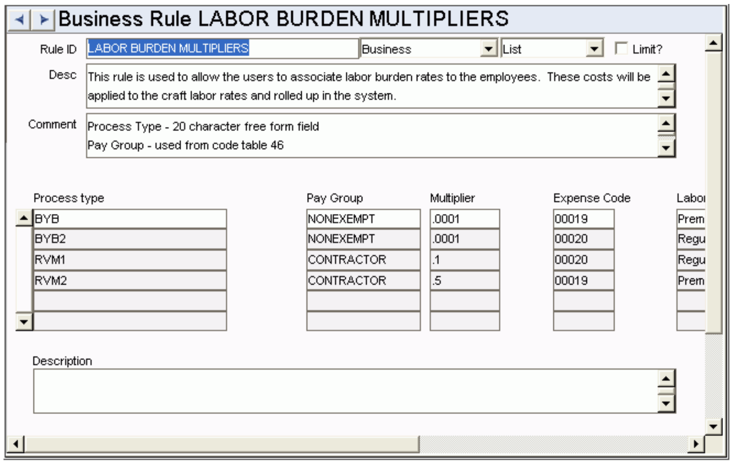
This parameter sets the expense code that the system will charge the employee's regular (i.e. non-premium) labor charges to.

Prem Expense

This parameter sets the expense code that the system will charge the employee's premium (i.e. Overtime) labor charges to.

Labor Burden Multipliers Rule

Associate labor burden rates to employees. These costs will be applied to the craft labor rates and rolled up in the system.



Business Rule LABOR BURDEN MULTIPLIERS

Rule ID: LABOR BURDEN MULTIPLIERS | Business | List | ☐ Limit?

Desc: This rule is used to allow the users to associate labor burden rates to the employees. These costs will be applied to the craft labor rates and rolled up in the system.

Comment: Process Type - 20 character free form field
Pay Group - used from code table 46

Process type	Pay Group	Multiplier	Expense Code	Labo
BYB	NONEXEMPT	.0001	00019	Prem
BYB2	NONEXEMPT	.0001	00020	Regu
RVM1	CONTRACTOR	.1	00020	Regu
RVM2	CONTRACTOR	.5	00019	Prem

Description:

Process Type

This is a 20 character free form field. Enter all of the process types that you want to charge pay groups to.

Pay Group

Enter the group that is responsible for the process type listed. These fields reference Code Table 46.

Multiplier

This is the value that is used as the burden multiplier.

Expense Code

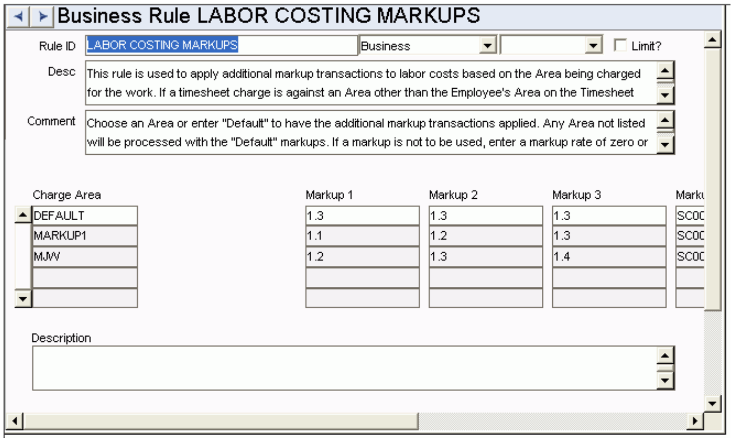
Enter the valid expense codes that should be charged for the corresponding pay groups.

Labor Type

Enter a Labor Type. PREMIUM or REGULAR.

Labor Costing Markup Rule

Apply additional markup transactions to labor costs based on the Area being charged for the work. If a timesheet charge is against an Area other than the Employee's Area on the Timesheet header, the markups for that Area will be included in the Account Log transactions and rolled up in the system.



Business Rule LABOR COSTING MARKUPS

Rule ID: LABOR COSTING MARKUPS | Business | ☐ Limit?

Desc: This rule is used to apply additional markup transactions to labor costs based on the Area being charged for the work. If a timesheet charge is against an Area other than the Employee's Area on the Timesheet

Comment: Choose an Area or enter "Default" to have the additional markup transactions applied. Any Area not listed will be processed with the "Default" markups. If a markup is not to be used, enter a markup rate of zero or

Charge Area	Markup 1	Markup 2	Markup 3	Marku
DEFAULT	1.3	1.3	1.3	SC0
MARKUP1	1.1	1.2	1.3	SC0
MJW	1.2	1.3	1.4	SC0

Description:

Charge Area

Choose an Area from the List of Values or enter Default to have the additional markup transactions applied. Any Area not listed will be processed with the Default markups. If a markup is not to be used with the Area, enter a markup rate of zero or leave blank.

Markup 1, 2, 3

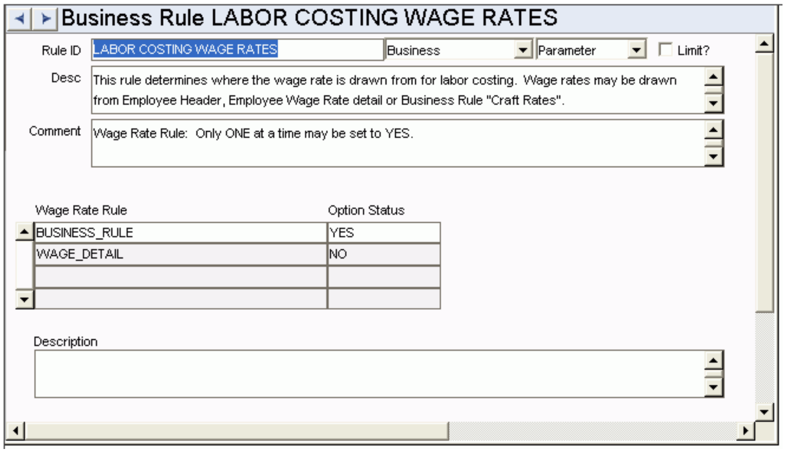
Enter the markup rate (multiplier) to be used for each of the three available Labor Markup transaction types. You can enter values of zero or greater up to 9.99 (999%). Enter rates in fractions (i.e., .25, .10, 1.2).

Markup 1, 2, 3 Exp

For each corresponding Labor Markup transaction type, enter the Expense Code to be used for the Labor Markup transaction type. The Lists of Values for these fields reference the EXPENSE CODES Business Rule.

Labor Costing Wage Rates Rule

Determine where the wage rate is drawn from for labor costing. Wage rates can be drawn from the Employee Wage Rate view in the Employee module or from the Craft Rates Business Rule. Only one option can be set to YES, and the other must be set to NO.



Rule ID: LABOR COSTING WAGE RATES | Business | Parameter | ☐ Limit?

Desc: This rule determines where the wage rate is drawn from for labor costing. Wage rates may be drawn from Employee Header, Employee Wage Rate detail or Business Rule "Craft Rates".

Comment: Wage Rate Rule: Only ONE at a time may be set to YES.

Wage Rate Rule	Option Status
BUSINESS_RULE	YES
WAGE_DETAIL	NO

Description:

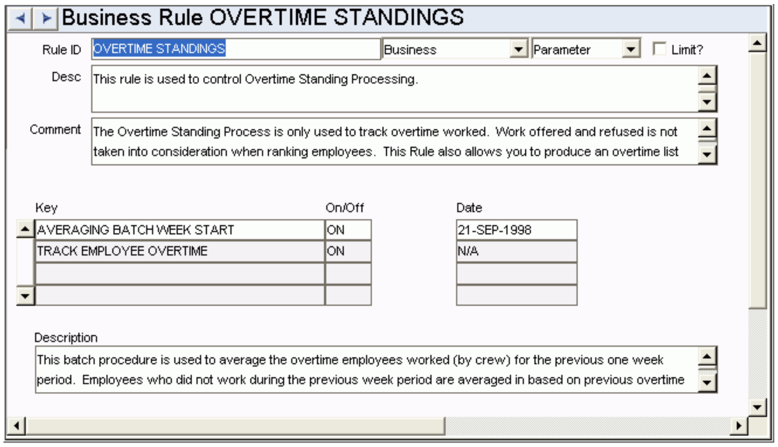
Wage Rate Rule and Option Status

BUSINESS_RULE - Uses the Craft Rates Business Rule to retrieve wage rates.

WAGE_DETAIL - Uses the Employee Wage Rate detail record for the wage rates. Set only one WAGE RATE RULE value to YES to use as the wage rate source; set the rest to NO.

Overtime Standings Rule

Control Overtime Standing processing.



Rule ID: OVERTIME STANDINGS | Business | Parameter | ☐ Limit?

Desc: This rule is used to control Overtime Standing Processing.

Comment: The Overtime Standing Process is only used to track overtime worked. Work offered and refused is not taken into consideration when ranking employees. This Rule also allows you to produce an overtime list

Key	On/Off	Date
AVERAGING BATCH WEEK START	ON	21-SEP-1998
TRACK EMPLOYEE OVERTIME	ON	N/A

Description: This batch procedure is used to average the overtime employees worked (by crew) for the previous one week period. Employees who did not work during the previous week period are averaged in based on previous overtime

The Overtime Standing Process is only used to track overtime worked. Work offered and refused is not taken into consideration when ranking employees. This rule also allows you to produce an overtime list for holiday overtime based on seniority. Note: This Rule is used with Reports 78, 79 and 80. Please consult Oracle Utilities Work and Asset

Management before you implement this Rule.

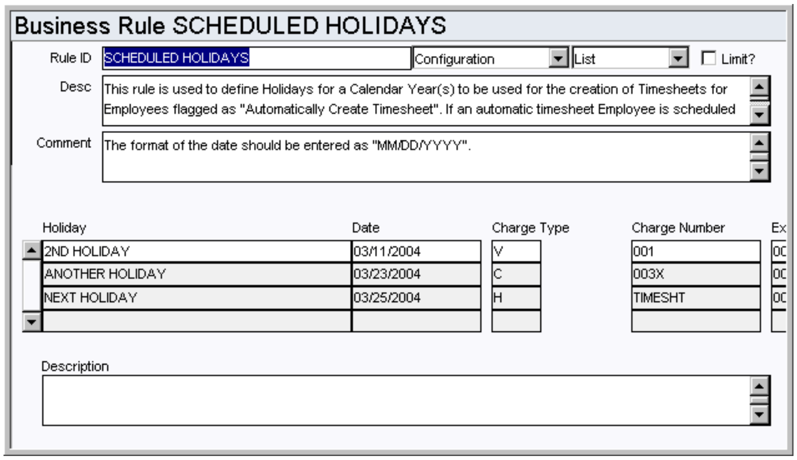
Key, ON/OFF, and Date

AVERAGING BATCH WEEK START - This batch procedure is used to average the overtime employees worked by crew for the previous one week period. Employees who did not work during the previous week period are averaged in based on previous overtime worked. For more information, see the Resource Users Guide, Employee module.

TRACK EMPLOYEE OVERTIME - Enter ON to track employee overtime. N/A has been entered in the DATE column as this column is not applicable.

Scheduled Holidays

The Scheduled Holidays rule defines holidays the system uses when creating timesheets for employees flagged for automatic timesheet creation.



Business Rule SCHEDULED HOLIDAYS

Rule ID: SCHEDULED HOLIDAYS | Configuration | List | ☐ Limit?

Desc: This rule is used to define Holidays for a Calendar Year(s) to be used for the creation of Timesheets for Employees flagged as "Automatically Create Timesheet". If an automatic timesheet Employee is scheduled

Comment: The format of the date should be entered as "MM/DD/YYYY".

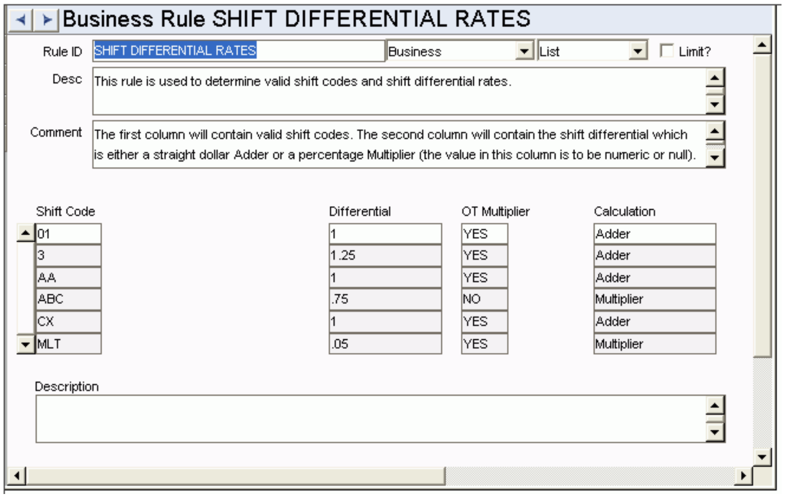
Holiday	Date	Charge Type	Charge Number
2ND HOLIDAY	03/11/2004	V	001
ANOTHER HOLIDAY	03/23/2004	C	003X
NEXT HOLIDAY	03/25/2004	H	TIMESHT

Description

If an employee is scheduled to work on the same day as a scheduled holiday, the Timesheet line item will be created using the Charge Type, Account and Regular Expense Code defined for the holiday. Shift and Differential information will come from the appropriate Employee record.

Shift Differential Rates Rule

Determine valid shift codes and shift differential rates.



Business Rule SHIFT DIFFERENTIAL RATES

Rule ID: SHIFT DIFFERENTIAL RATES | Business | List | ☐ Limit?

Desc: This rule is used to determine valid shift codes and shift differential rates.

Comment: The first column will contain valid shift codes. The second column will contain the shift differential which is either a straight dollar Adder or a percentage Multiplier (the value in this column is to be numeric or null).

Shift Code	Differential	OT Multiplier	Calculation
01	1	YES	Adder
3	1.25	YES	Adder
AA	1	YES	Adder
ABC	.75	NO	Multiplier
CX	1	YES	Adder
MLT	.05	YES	Multiplier

Description

Shift Code

Enter the SHIFT CODE which is the definition of hours for an employee's scheduled period of work.

Differential

Enter the DIFFERENTIAL which is the additional hourly amount to be paid employees working the defined shift hours. This amount is added to the employee wage rate when using the Labor Costing Premium Multiplier Rule.

Example: An electrician makes $25.00/hour, plus $1.00 if he works the night shift. His regular rate with Shift Differential is $25.00 + $1.00 = $26.00. If he works overtime at time and a half, his wage rate would be $39.00 (Wage Rate of $25.00 + Differential of $1.00 = $26.00) x Premium Multiplier of 1.5 = Hourly Rate of $39.00.

OT Multiplier

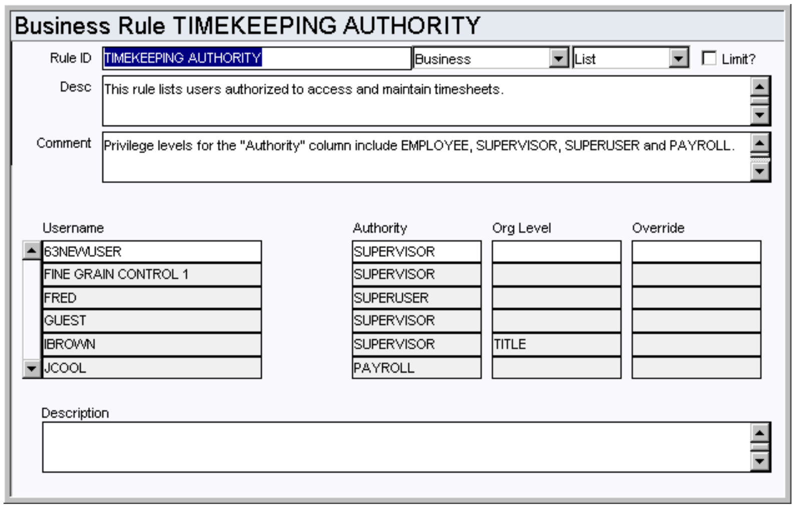
If the OT Multiplier is set to Yes, then the calculations for premium shift amount will include the OT Multiplier: Premium Shift Differential *Multiplier *OT Multiplier * (Premium Hours - Comp Time Hours). If set to No, then the calculations for premium shift amount will NOT include the OT Multiplier: Premium Shift Differential *Multiplier * (Premium Hours - Comp Time Hours).

Calculation

The differential can be added to the wage rate or multiplied by the wage rate. Enter Adder or Multiplier in this column to define how the system should calculate the values.

Timekeeping Authority Rule

Use this rule to define which users can access and maintain timesheets, leave requests, and employee records. This rule only controls who has access to the records, approval authorization is controlled in the Approval Limits module.



Business Rule TIMEKEEPING AUTHORITY

Rule ID: TIMEKEEPING AUTHORITY | Business | List | ☐ Limit?

Desc: This rule lists users authorized to access and maintain timesheets.

Comment: Privilege levels for the "Authority" column include EMPLOYEE, SUPERVISOR, SUPERUSER and PAYROLL.

Username	Authority	Org Level	Override
63NEWUSER	SUPERVISOR		
FINE GRAIN CONTROL 1	SUPERVISOR		
FRED	SUPERUSER		
GUEST	SUPERVISOR		
IBROWN	SUPERVISOR	TITLE	
JCOOL	PAYROLL		

Description:

Username

Enter individual Usernames to set an authority level for access to Employee records, Timesheets, and Leave Requests. Anyone not listed will have the DEFAULT authority. By setting the USERNAME column to DEFAULT and the AUTHORITY column to EMPLOYEE, all users will be granted employee level authority without your needing to identify them explicitly.

Note: A supervisor defined in this module does NOT correspond to the Supervisor fields defined by code table 310.

Authority

The Authority column defines the scope of a users' authority. The authority levels include: Employee, Supervisor, Superuser and Payroll.

EMPLOYEE - User can only view or modify their own timesheet or employee record. Org Level does not apply.

SUPERVISOR - User can view or modify their own records and records of members of the Org Level entered. The Org Level value is used to widen the scope of the Supervisor authority. Set the value to Department, Area, or Crew, and the system limits the corresponding username to have access to other user's records who share the same Department, Area or Crew on their EMPLOYEE record. If you enter TITLE as the Org Level, the username is limited to see the user's records who are on the same CREW module record with the username. This allows Supervisors to approve timesheets for multiple crews (any crew that they are on).

SUPERUSER - User can view or modify any record. Org Level does not apply.

PAYROLL - User can view or modify any record, as well as override or adjust Compensatory Time Accrual calculations. Org Level does not apply.

For example, If BIGBOSS is entered under username in this business rule with the Authority set to Supervisor, and the Org Level set to Title, the system provides him access to the records for all users who are on the same CREW module records as BIGBOSS. If the Org Level is left blank or set to Crew the system provides BIGBOSS with access to the records of every user who has the same Crew entered on their EMPLOYEE module record as he has on his Employee record.

Org Level

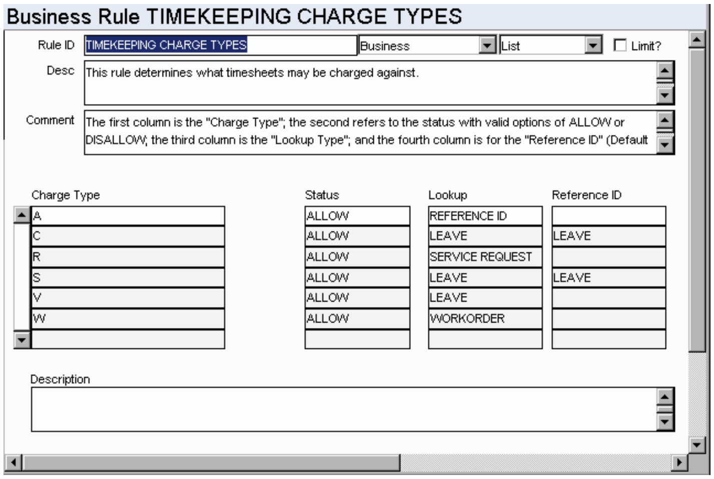
The Org Level value is used to widen or narrow the scope of the Supervisor authority. See above for valid values and definitions.

Override

This value is only used for those with the Supervisor or Superuser authority to temporarily promote them to Superuser or Payroll. Enter Superuser or Payroll in the Override column to give this authority to a user (to substitute for a supervisor who is on vacation, for instance). Entering this value does not modify the authority of any other user. It can be changed or cleared later to restore the user to their original authority.

Timekeeping Charge Types Rule

Controls which Charge Types are valid in the Timekeeping module.



Business Rule TIMEKEEPING CHARGE TYPES

Rule ID: TIMEKEEPING CHARGE TYPES | Business | List | ☐ Limit?

Desc: This rule determines what timesheets may be charged against.

Comment: The first column is the "Charge Type"; the second refers to the status with valid options of ALLOW or DISALLOW; the third column is the "Lookup Type"; and the fourth column is for the "Reference ID" (Default

Charge Type	Status	Lookup	Reference ID
A	ALLOW	REFERENCE ID	
C	ALLOW	LEAVE	LEAVE
R	ALLOW	SERVICE REQUEST	
S	ALLOW	LEAVE	LEAVE
V	ALLOW	LEAVE	
W	ALLOW	WORKORDER	

Description:

Charge Type

Enter information into the Charge Type column. These values should be a single, unique character such as A for Account or S for Sick Leave.

Charges based on an Account Number use the Reference ID field as the Charge Number. Any Account Number you wish to directly charge time against must have a Reference ID. For more information regarding Reference ID's, please refer to the Account section of the Resource User Guide.

Status

The STATUS column of each Charge Type must be set to ALLOW or DISALLOW to allow or disallow charging time to that item.

Lookup

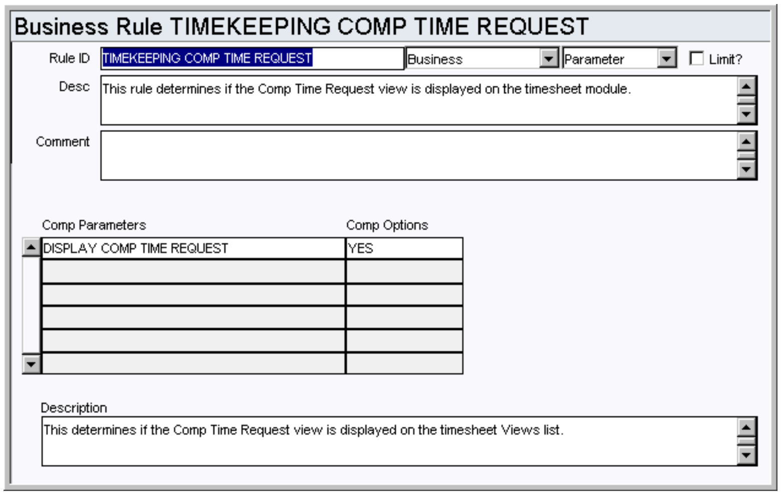
The LOOKUP column determines which database table is used to validate the associated Account Number at the time labor charges are entered.

Reference ID

The REFERENCE ID column contains an optional default Account Number. If you enter a value into this column, when a user charges time against this Charge Type, the Account Number entered here will default on the Timesheet and can not be overridden. This processing applies to charge types such as Sick Leave where you would not want users to enter any Account Number for sick time. If the entered Account Number is deactivated or deleted from the Account module, users will not be able to use the associated Charge Type.

Timekeeping Comp Time Request Rule

This rule determines if the Comp Time Request view displays on the Views list in the Timesheet module.



Business Rule TIMEKEEPING COMP TIME REQUEST

Rule ID: TIMEKEEPING COMP TIME REQUEST · Business · Parameter · ☐ Limit?

Desc: This rule determines if the Comp Time Request view is displayed on the timesheet module.

Comment:

Comp Parameters	Comp Options
DISPLAY COMP TIME REQUEST	YES

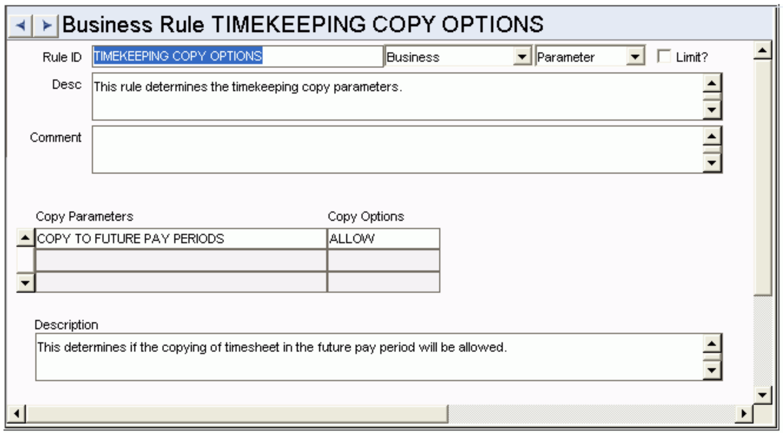
Description: This determines if the Comp Time Request view is displayed on the timesheet Views list.

Comp Parameters and Comp Options

The default setting is YES, which allows the view to display. When the Comp Time Request Option is set to NO, the view is hidden from all users.

Timekeeping Copy Options Rule

Control whether or not the system will allow users to enter future pay period when using the Copy Single Timesheet Option of the Timesheet Wizard.



Business Rule TIMEKEEPING COPY OPTIONS

Rule ID: TIMEKEEPING COPY OPTIONS | Business | Parameter | ☐ Limit?

Desc: This rule determines the timekeeping copy parameters.

Comment:

Copy Parameters	Copy Options
COPY TO FUTURE PAY PERIODS	ALLOW

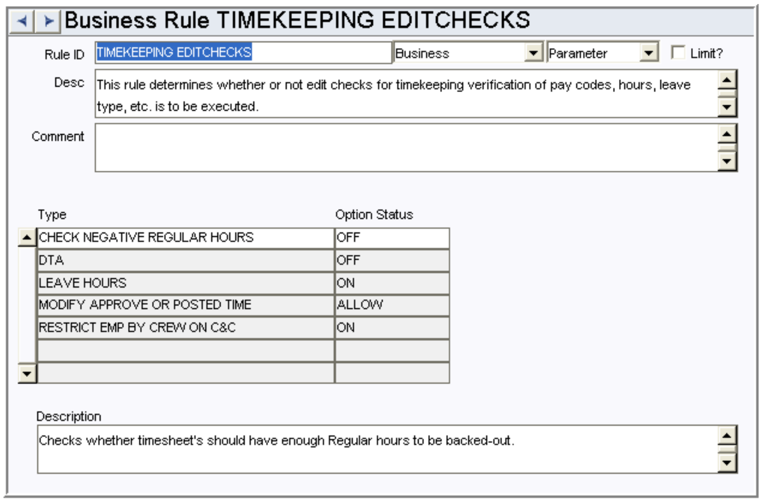
Description: This determines if the copying of timesheet in the future pay period will be allowed.

Copy Parameters and Copy Options

COPY TO FUTURE PAY PERIODS - The Copy Options column must be set to ALLOW or DISALLOW. If set to ALLOW, future pay period dates can be entered on the Copy Information From and Copy Information To screens of the Timesheet Wizard. If set to DISALLOW, the system will not allow dates that are not within the current pay period.

Timekeeping Editchecks Rule

Determines whether or not edit checks for timekeeping verification of pay codes, hours, leave type, etc. is to be executed.



Business Rule TIMEKEEPING EDITCHECKS

Rule ID: TIMEKEEPING EDITCHECKS | Business | Parameter | ☐ Limit?

Desc: This rule determines whether or not edit checks for timekeeping verification of pay codes, hours, leave type, etc. is to be executed.

Comment:

Type	Option Status
CHECK NEGATIVE REGULAR HOURS	OFF
DTA	OFF
LEAVE HOURS	ON
MODIFY APPROVE OR POSTED TIME	ALLOW
RESTRICT EMP BY CREW ON C&C	ON

Description: Checks whether timesheet's should have enough Regular hours to be backed-out.

Type and Option Status

CHECK NEGATIVE REGULAR HOURS - When this rule key is set to ON the Timesheet form validates that there is an existing Timesheet line item to allow an offset line item entry to the same charge number with a negative value less than or equal to the existing line item. When the key is set to OFF, the form allows a negative hours line item to be entered on the timesheet without the same charge number with a value greater tan or equal to the negative value being entered. The Default is ON.

DTA - Special DTA (Distributed Time and Attendance) edit checks.

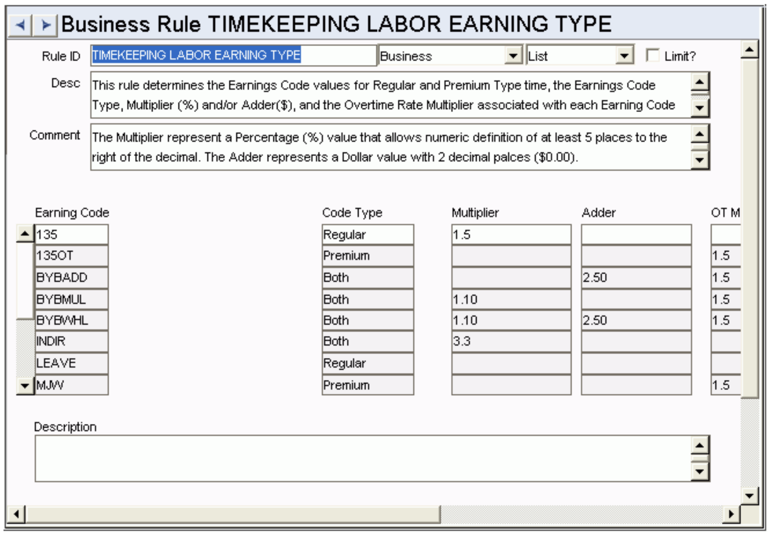
LEAVE HOURS - This will verify if there is enough available leave hours.

MODIFY APPROVED OR POSTED TIME - When this key is set to Disallow, only users with the timekeeping authority “PAYROLL” can modify timesheets in Approved or Posted status. If this rule key is set to Allow, users with timekeeping authority SUPERVISOR, SUPERUSER and PAYROLL are able to modify APPROVED and POSTED timesheets.

RESTRICT EMP BY CREW ON C&C - If this rule key is set to ON, the Employee list of values in the Cost and Closeout field are restricted to only those employees that are assigned to the specified Crew. When the Crew field is cleared, system will also clear the Employee field. If the key is set to OFF, the Employee list of values is open to all Active Employees.

Timekeeping Labor Earning Type Rule

Determine the Earnings Code values for Regular and Premium Type time, the Earnings Code Type, Multiplier (%) and/or Adder ($), and the Overtime Rate Multiplier associated with each Earning Code that can be applied to the employee's base pay rate and hours when calculating Actual Labor Costs and Payroll data.



Rule ID: TIMEKEEPING LABOR EARNING TYPE | Business | List | ☐ Limit?

Desc: This rule determines the Earnings Code values for Regular and Premium Type time, the Earnings Code Type, Multiplier (%) and/or Adder($), and the Overtime Rate Multiplier associated with each Earning Code

Comment: The Multiplier represent a Percentage (%) value that allows numeric definition of at least 5 places to the right of the decimal. The Adder represents a Dollar value with 2 decimal palces ($0.00).

Earning Code	Code Type	Multiplier	Adder	OT M
135	Regular	1.5		
135OT	Premium			1.5
BYBADD	Both		2.50	1.5
BYBMUL	Both	1.10		1.5
BYBWHL	Both	1.10	2.50	1.5
INDIR	Both	3.3		
LEAVE	Regular			
MJW	Premium			1.5

Description

Earning Code

Use this column to label the Earnings Code. Earnings Codes defined here display on the Earnings Codes Lists of Values on the Timesheet, Timesheet Wizard, and elsewhere in the system when time is entered.

Code Type

Indicate if the supplemental Earnings Code is to be used for Regular time, Premium time, or Both. For hours entered on a timesheet, only one premium code or one regular code can be selected at a time. For additional hours with different codes, a separate entry must be made on the timesheet. You can assign the OT Rate Multiplier to a Both type Earnings Code. The system applies the OT Rate Multiplier only to the Premium Amount and not to Regular Amount, even when the Code type is set to Both.

Multiplier

The Multiplier represents a percentage (%) value that allows numeric definition of at least 5 places to the right of the decimal (1.5%=.015). An Earnings Code can be defined with a Multiplier, with an Adder, or with both.

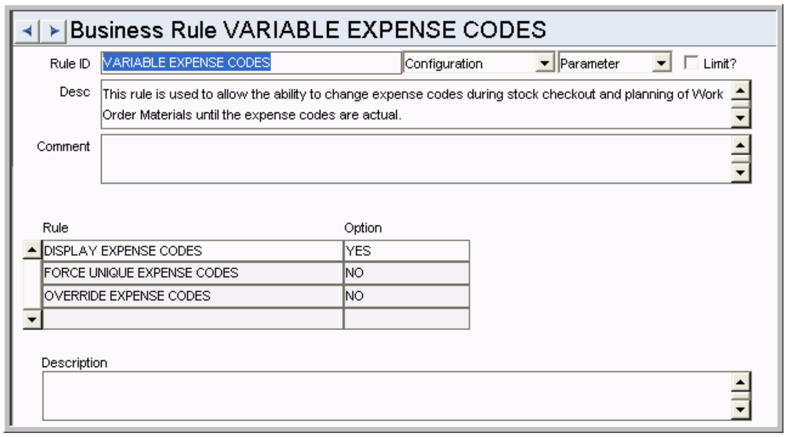
Adder

The Adder represents an hourly dollar value with 2 decimal places ($0.00). The Adder cannot be a negative number. The system uses the Adder to increase the employee's regular or premium pay

OT Multiplier

The system uses the OT Rate Multiplier to calculate the Revised Base rate when calculating Premium Time. The Revised Base is calculated before the Earnings Code Adder and Multiplier is applied.   Note: If timesheets have not been posted or if costs have not been rolled up when an Earnings Code value is changed, items referencing that Earnings Code will use the new rate when processed.

Variable Expense Codes Rule



Rule ID: VARIABLE EXPENSE CODES | Configuration | Parameter | ☐ Limit?

Desc: This rule is used to allow the ability to change expense codes during stock checkout and planning of Work Order Materials until the expense codes are actual.

Comment:

Rule	Option
DISPLAY EXPENSE CODES	YES
FORCE UNIQUE EXPENSE CODES	NO
OVERRIDE EXPENSE CODES	NO

Description:

This rule determines how expense codes are handled during stock checkout, checkout request, planning work order task materials and labor, and in the Timekeeping module. Regardless of the settings in this rule, any desired changes to expense codes can only be made before costs are actualized. Once actual costs are applied, the expense code on the record cannot be changed.

Rule and Option

DISPLAY EXPENSE CODES - If you enter YES as the option, the system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for stock checkouts based on Work Orders. Enter NO and the field is not displayed.

FORCE UNIQUE EXPENSE CODES - If you enter YES for this option, work order time charges for the same craft must have the same expense codes. The default setting is YES.

OVERRIDE EXPENSE CODES - Enter YES or NO in the OPTION column to allow or disallow users to change expense codes on timesheets, issue tickets for stock checkout, stock checkout requests, and material and labor detail records on work order tasks.

Entering YES in the OPTION column has the following implications:

- Materials planners will be able to overwrite the default expense codes for the Materials view of the Work Order module in the Maintenance subsystem. The system defaults this information from expense code associated with the Stock Code and Storeroom.

- Employees responsible for creating Issue tickets for stock item checkouts will be able to change the associated Expense code.

- The system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for sock checkouts based on Work Orders. This includes expense codes that have been provided by planners.

- Labor planners will be able to overwrite the default expense codes for Regular and Premium labor on Work Order Tasks. The system defaults this information from the Craft associated with the Work Order Task.

- Workers who enter their own time into the Timekeeping module of the Maintenance subsystem, will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners.

- Supervisors who review timesheets will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners and/or changed by employees on their timesheets.

Combining the Rules:
To keep anyone from changing expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = NO

To allow only Planners to use variable expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = YES

To allow charges for the same craft to use different expense codes:

Display Expense Codes = YES

Force Unique Expense Codes = NO

Override Expense Codes = YES

Copy Record

TIMESHT - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Approve All Timesheets

Grants access to the Approval All Timesheets action in the Timekeeping module.

Cost and Closeout

Adds the Cost and Closeout action to the user's home page action list.

Route Timesheet for Approval

Grants the ability to set the statuses of multiple timesheets to pending approval. Selecting the action from the Timesheet module on any one of the time period views sends one alert per timesheet in that period to the designated approver.

Timesheet Wizard

Grants the ability to use the Timesheet Wizard from the home page.

Batch Processes

Auto Create Timesheets - sdbp_auto_create_timesheet.main;

Triggers functionality where the system automatically creates timesheet records for employees as designated on their Employee record. The system can be configured to automatically create timesheets for employees who work a fixed schedule by checking the Automatically Create Timesheet? Indicator in the Auto Timesheet Schedule view in the Employee module.

Cost and Closeout - smu_interface.sdbp_mu_interface (job_in, plant_in,'N');

Processes transactions entered in cost and closeout.

Leave Request - sdbp_post_leave;

Posts Leave Requests and creates timesheets for approved Leave Requests that have the Create Timesheet indicator checked and are in an open Pay Period.

Post Timesheet - sdbp_post_timesheets.post_time;

Posts timesheet information such as Leave, Regular Time etc. for Pay Periods and recalculates the balance. Once a Timesheet has posted for the Pay Period, the payroll status is set to Closed.

Reports

S_RPT066 - Payroll Report

Provides a summary of hours and wages for payroll.

S_RPT067 - Labor Expenditure Summary by Account Report

Provides a summary of labor costs by Account Number for a given Pay Period.

S_RPT068 - Labor Distribution by Account Report

Provides labor costs and hours by Account Number.

S_RPT069 - Labor Distribution by Employee Report

Provides labor costs and hours by Admin. Department.

S_RPT079 - Overtime Standing Report by Crew

Lists overtime standing information for each crew.

S_RPT080 - Overtime Standing Report by Zone

Lists overtime standing information by overtime zone.

S_RPT139 - Employee Timekeeping Report

Provides a summary of hours and wages for payroll.

Charts

S_CHT138 - Timekeeping Analysis

Timesheet Hours for the current year and the previous year. The data can be filtered further by Plant, Department, Area, Earnings Code, Charge Type, and Pay Type.

Chapter 5

Purchasing Subsystem

Vendor Code Structure Module

Use the Vendor Code Structure module to define how vendor codes appear in the Vendor module. The system displays all Vendor Code fields throughout the system using the defined structure.

Determine the number of segments, segment names, lengths, whether the segments are required, whether the second segment should be sequenced, and the delimiter to separate the two segments.

Fields

Segment Name

If your organization will not use multiple locations for vendors, leave segment 2 blank.

The user has the ability to create the segment names that will show in the vendor module. There are two segments that will be used to create the vendor code. The first segment name is required by the system. This is the general Vendor code used in all processing. Users who want to also establish different locations for each vendor can set a second segment for the Location Code.

Avoid the use of the special characters ', ", &, or % as they may result in processing errors.

Length

The Length field indicates the maximum number of characters that can be entered in the segment. If a user enters less than the maximum, the system displays the positions for the other characters as blanks. The total length of the two segments cannot exceed 30 characters, and the character delimiter counts as a character.

Make sure that the length entered here is the same as the length entered for the table SA_Vendor in the Sequence Numbers module. If these numbers are different, the system will generate an error message when it tries to create a sequence number for the Vendor Code.

Sequenced?

You must check the Required box next to segment two before the sequence or length can be entered.

If this indicator is set, the second segment is sequenced when creating new location records for vendors. It is recommend that you DO NOT use automatic sequencing for the second segment so that you can include an intelligent identification system for each Location. For example, you can have a Vendor ID (0000000003 - Grainger) which has multiple location sites (001 - Anaheim, 002 - Chicago, 003 - Detroit).

The first segment can be made system generated by configuring the Sequence module for the table name SA_VENDOR.

Required

The first segment is always required by the system as it identifies the vendor code.

When this box is checked for the second segment the system is able to manage vendors by multiple locations. Checking this box also enables the Add Location action in the Vendor module.

Delimiter Character

The Vendor Code is a combination of segment 1 and segment 2. You can use the Delimiter field to determine what kind of character the system will show between segments of the Vendor Code. If no delimiter is defined, the segments are simply combined with no separation.

The lines between the Required check boxes and the Delimiter Character field do not represent anything and should be ignored.

Vendor Module

Fields

Sequence No.: Vendor Code

The record number is comprised of a unique ID (Ex. "VDR002"). Vendor codes numbers are typically set to be created manually.

TABLE NAME - SA_VENDOR - The sequence number generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

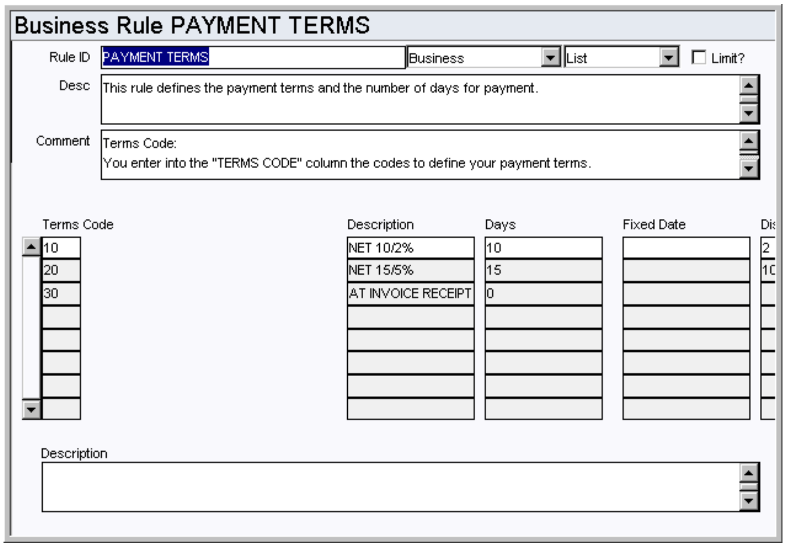
Please refer to Sequence Numbers Module for more information and examples.

E-Mail Purchase Orders to Vendors (Characteristics View)

If you want to allow your Buyers to e-mail Purchase Orders and/or Blanket Contracts to Vendors, you must enter Purchasing as a Characteristic Type and the corresponding value as the Characteristic.

Business Rules

Payment Terms Rule



Business Rule PAYMENT TERMS

Rule ID: PAYMENT TERMS | Business | List | ☐ Limit?

Desc: This rule defines the payment terms and the number of days for payment.

Comment: Terms Code:
You enter into the "TERMS CODE" column the codes to define your payment terms.

Terms Code	Description	Days	Fixed Date	Dis
10	NET 10/2%	10		2
20	NET 15/5%	15		10
30	AT INVOICE RECEIPT	0		

Description:

Define payment terms and the number of days before payment is due per term.

Terms Code and Description

Enter the codes to define your payment terms, and define the code in the Description column.

Days

Enter the number of days that the system should use to calculate the invoice due date based on the vendor date entered on the invoice.

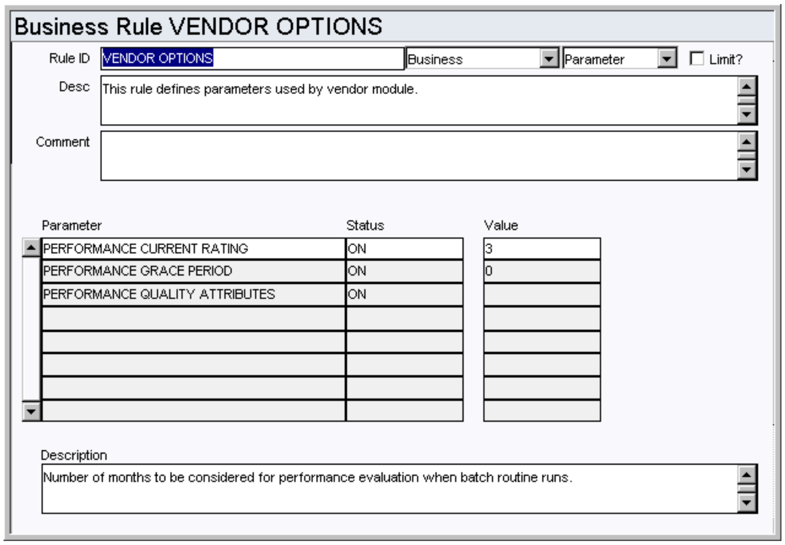
Fixed Date

If a vendor has arranged for an invoice due date to be the same each month, enter the day into the this column. For example, if 20 is entered in this column, the due date would be the 20th of every month.

Discount %

Enter any discount that might be given for using a certain payment term.

Vendor Options Rule



Business Rule VENDOR OPTIONS

Rule ID: VENDOR OPTIONS
Business
Parameter
☐ Limit?

Desc: This rule defines parameters used by vendor module.

Comment:

Parameter	Status	Value
PERFORMANCE CURRENT RATING	ON	3
PERFORMANCE GRACE PERIOD	ON	0
PERFORMANCE QUALITY ATTRIBUTES	ON	

Description: Number of months to be considered for performance evaluation when batch routine runs.

Define parameters used by the Vendor module in rating vendor performance.

Parameter, Status, and Value

PERFORMANCE CURRENT RATING - Determines the number of months to be used in the batch calculations of Vendor Performance. Enter ON in the Status column to enable Vendor Performance calculations. Enter the number of months to be considered in the Value column.

The rating is calculated based on delivery dates that fall between one full month prior to the current date minus the number of months entered in the Value column.

Note: The Performance view is only visible if this rule key is set to ON.

PERFORMANCE GRACE PERIOD - Determines the number of days after the Promise Date before a delivery is considered to be late. Enter ON in the Status column to enable Grace Periods. Enter the number of grace days in the Value column. Only one grace period can be set for all shipments.

PERFORMANCE QUALITY ATTRIBUTES - Determines whether on not the system will use the attributes and point values defined in the VENDOR PERFORMANCE ATTRIBUTES Business Rule.

When this rule key is ON, the quality rating is based on the score received for each shipment from the vendor. When the rule key is OFF, the quality rating is based on PO line item, not shipment, being received without the discrepancy indicator being set.

VENDOR NAME - If your organization does not use two part vendor, as set in the Vendor Code Structure module, this rule key does not apply. Determines how the vendor name is displayed in lists of values and wherever else the vendor name is displayed throughout the system.

If Two Part Vendor is in use, the default value for this VENDOR NAME rule key is LOCATION. The Status setting is ignored. If you want to alter the default, options include the following:

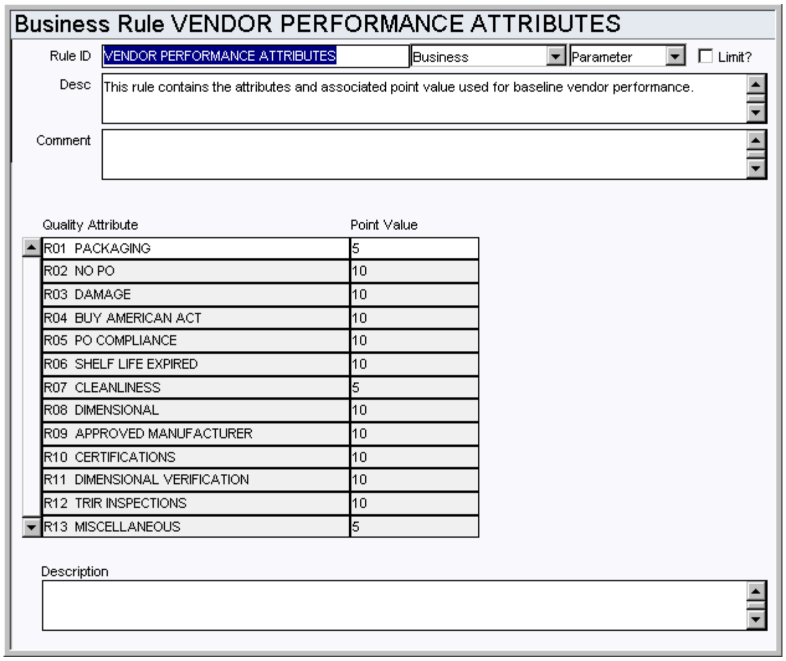
> **VENDOR** - If the parameter is set to VENDOR, then the vendor name is displayed as the actual vendor name. This is the value in the sa_vendor.vendor_name column.

LOCATION - If the parameter is set to LOCATION, then the vendor name is displayed as the location name only. This is the value in the sa_vendor.location_name column.

VENDORLOC - If the parameter is set to VENDORLOC, then the vendor name is displayed as "vendor name - location name" using the same related columns as noted above.

The vendor value comes from the sa_vendor.vendor_name column. The location value comes from sa_vendor.location_name column.

Vendor Performance Attributes Rule (Performance View)



Business Rule VENDOR PERFORMANCE ATTRIBUTES

Rule ID: VENDOR PERFORMANCE ATTRIBUTES | Business | Parameter | ☐ Limit?

Desc: This rule contains the attributes and associated point value used for baseline vendor performance.

Comment:

Quality Attribute	Point Value
R01 PACKAGING	5
R02 NO PO	10
R03 DAMAGE	10
R04 BUY AMERICAN ACT	10
R05 PO COMPLIANCE	10
R06 SHELF LIFE EXPIRED	10
R07 CLEANLINESS	5
R08 DIMENSIONAL	10
R09 APPROVED MANUFACTURER	10
R10 CERTIFICATIONS	10
R11 DIMENSIONAL VERIFICATION	10
R12 TRIR INSPECTIONS	10
R13 MISCELLANEOUS	5

Description:

Specify the 'Best Price Multiplier' for given performance ranges. You can establish as many ranges as needed, but the Ranges can not overlap and they must be whole numbers. When the multiplier is more than 1 the vendor's quoted price on an RFQ is increased by the amount of the multiplier. This is a way to weight non-performing vendors.

Determine the attributes and associated point values used for vendor performance rating.

Quality Attribute

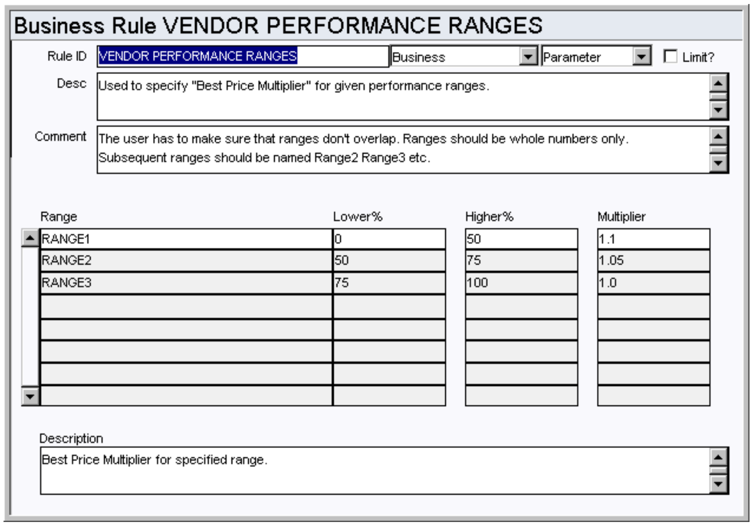
Enter Quality Attributes that describe the criteria that will be used to determine whether or not a vendor has delivered items or services properly. Typical examples are Packaging, Damage, Delivery, PO Compliance, and Cleanliness.

Point Value

Assign a Point Value, based on the importance of Vendor compliance, to each attribute.

The system uses the attributes and point values when calculating each vendor's performance rating. These values are then used to determine the vendor's overall performance rating.

Vendor Performance Ranges Rule (Performance View)



Rule ID: VENDOR PERFORMANCE RANGES

Business

Parameter

☐ Limit?

Desc: Used to specify "Best Price Multiplier" for given performance ranges.

Comment: The user has to make sure that ranges don't overlap. Ranges should be whole numbers only.
Subsequent ranges should be named Range2 Range3 etc.

Range	Lower%	Higher%	Multiplier
RANGE1	0	50	1.1
RANGE2	50	75	1.05
RANGE3	75	100	1.0

Description: Best Price Multiplier for specified range.

Subsequent ranges should be named Range2 Range3 etc.

Range
Ranges should be named Range1, Range2, Range3, up to the total number of ranges to be defined.

Lower %
Enter the lower percentage value for the Total Vendor Performance for the range.

Higher %
Enter the higher percentage value for the Total Vendor Performance for the range. Since this value is a 'less than' value, enter 101% to include vendor performance rating of 100%.

Multiplier
Enter the multiplier value for the range. Define multiplier values to increase bids from vendors with lower vendor performance ratings.

Code Tables

Code Table 22: Vendor Characteristic Types (Characteristics View)

Characteristic Type field - Define vendor characteristics. The List of Values for the Characteristic field is limited by your selection in this field. Values for the Characteristic field should be linked to this code table.

Code Table 43: FOB

FOB (Free On Board) field - Define codes to designate from which point the Buyer pays for the delivery charges. This code table is typically populated with Vendor and Buyer locations.

Code Table 56: Vendor Characteristics (Characteristics View)

Characteristic field - Linked Code table when ‘General’ is entered in the Characteristic Type field.

Code Table 68: Vendor Classification Types (Characteristics View)

Linked to Vendor_Class in Code Table 22.

Code Table 122: Commodity Category Codes (Commodities View)

Category field - Commodity information can be especially helpful when trying to locate a specific stock code. Commodity Codes categorize and sub-categorize stock items, allowing you to create and maintain a descriptive structure used to quickly identify the type of part you are looking for, and from a much shorter list of stock items, locate the right one.

A sample Category Code might be Electrical or Instrumentation.

Link

Each Category Code points to its own Commodity Name Code Table. This Link field is where the Commodity Name Code Table number would be inserted. For example, if 'M' (for Mechanical) is chosen as the Commodity Code, the 'linked' table for Commodity Names would only contain values that pertain to the 'M' category.

Code Tables 122, 123, 124, 125, 128, and 129 work in conjunction to define a Commodity Code for a Stock Item.

Code Table 123: Commodity Composition (Commodities View)

Composition field - Physical matter types are populated in this code table. Some examples might be Aluminum, Iron, Rubber, etc.

Code Table 115: Auditor Codes (Approved Vendors View)

Auditor field - Define codes to identify valid auditors for Vendors. Examples include Primary Vendor Manager for Chemical Providers, Primary Vendor Manager for Fuel Providers, Primary Vendor Manager for Mech Parts and EQP Providers, etc.

Code Tables 173, 174, 177, 178, and 179: Vendor Capability Code Segments 1-5 (Capabilities View)

Capabilities View - These code tables identify the types of products a particular vendor can supply. These tables serve as a useful means of searching for vendors where the capabilities are known. A capability is the product or service the Vendor provides, a characteristic (code table 56) is descriptive of the type of business they conduct.

The following web sites govern ways to breakdown vendor capabilities and characteristics:

NAICS and SIC http://www.census.gov/pub/epcd/www/naics.html

SIC http://www.wave.net/upg/immigration/sic_index.html

UNSPSC http://www.eccma.org/unspsc/

Code Table 175: Vendor Evaluation Grades (Evaluation View)

(Overall Rating, Delivery, Price, and Rejection Rate)

Overall Rating field - Define a rating system to evaluate vendors. Typical entries for this code table might be 'B', below average, 'A', average, 'E', excellent performance, etc. This code table is used for Overall Rating, Delivery, Price, and Rejection Rate LOV.

System Code Table (Cannot be modified)

Code Table 65: Purchasing Vendor Characteristics (Characteristics View)

Characteristic field - Linked code table when ‘Purchasing’ is entered in the Characteristic Type field. If you want to enable the ability to email purchase orders or blanket contracts to the vendor, make sure that EMAIL PO and/or EMAIL BC are entered as values for this characteristic.

Copy Record

VENDOR - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Set Vendor Auto Pay Indicator

Grants the ability to check or uncheck the Auto Pay Ind. box on Vendor records to designate or remove Auto Pay Vendor status.

Batch Processes

Vendor Performance - sdbp_vendor_performance.vendor_performance;

Supports the gathering of Vendor Performance statistics. This procedure performs the following:

- Identifies the processing parameters for the Current Rating Period for Active Vendors.
- Updates Quality Performance data based on changes since the last batch run.
- Updates Delivery Performance data for new transactions.
- Updates Quality Performance data for new transactions.

Charts

S_CHT1136 - PO By Vendor - Count of POs

A count of Purchase Orders for the current year and previous years. The data can be filtered further by Plant and Vendor Name. Other filtering options, such as Buyer, PO Type and PO Status, are available in the Chart Field List.

S_CHT135 - PO By Vendor - Total Amount

Shows the Total Amount of Purchase Orders for the current year and the previous year. The data can be filtered further by Plant and Vendor Name. Other filtering options, such as Buyer, PO Type and PO Status, are available in the Chart Field List.

Reports

S_RPT142 - Deficient Vendors Report

Displays Vendors who have a Composite Rating of less than 90% and who have made at least 10 Deliveries (both for the Current Period). It also contains a detailed listing of the Vendor's Late Deliveries and/or Quality Deficiencies.

S_RPT201 - Purchase Order Listing Report - Grouped by Vendor Code

Displays a summary of all Purchase Orders Grouped by Vendor Code.

S_RPT207 - Purchase Order Report - Vendor Copy

The purchase order that is sent to Vendor's when orders are made.

S_RPT200 - Purchase Order Vendor Report

Displays a Vendor summary of all Purchase Orders within a Date Range.

S_RPT018 - Storeroom Value by Vendor

Lists total storeroom values by Vendor from the storeroom module.

S_RPT143 - Superior Vendor Performance Data

Displays Vendor Performance Data for vendors with a Composite Rating of at least 98% and who have made at least 10 Deliveries (both for the Current Period).

S_RPT022 - Vendor Characteristics Report

Lists Vendors and their characteristics from the Characteristics detail in the Vendor module of the Purchasing subsystem.

S_RPT213 - Vendor Classification Activity Report

Summarizes Purchase Orders issued against Blanket Contracts by Vendor Class and Vendor Name.

S_RPT124 - Vendor Label Report

Outputs Vendor mailing label data for use with Avery 5160 labels.

S_RPT021 - Vendor Listing Report

Lists Vendor information created in the Vendor module of the Purchasing subsystem.

S_RPT144 - Vendor Performance by Buyer

Displays the number of On Time and Late Deliveries and the On Time Percentage for each Vendor, grouped by Buyer. It will also display their Year To Date figures.

S_RPT145 - Vendor Performance Data

Displays Vendor Performance Data.

S_RPT141 - Vendors with 3 or More Deficiencies

Displays Vendors who have 3 or more Quality Deficiencies along with a list of the deficiencies.

Requisition Module

Fields

Sequence No.: Requisition Number

The record number is comprised of a unique ID (Ex. “0200683”). Requisition record numbers must be system generated. Manual creation of these record numbers could result in critical system errors when records are created from other records or in batch procedures.

> **TABLE NAME** - SA_REQUISITION - The sequence number is generated for this database table.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate approvers for Requisitions the Approval Limits module of the Administration subsystem under Approvals and Routes.

Buyer field

Make sure to populate the Buyer module with codes for Buyers responsible for purchasing documents.

Ship To field

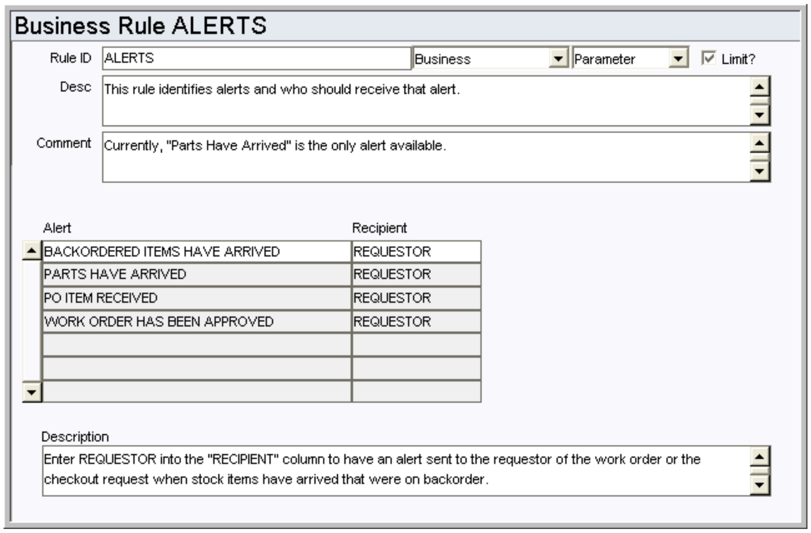
The List of Values for the Ship To field is controlled by active storerooms entered in the Storeroom module of the Resource subsystem.

Currency (Buyer Data View)

Currency Codes are defined and updated in the Currency Exchange Rates module.

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS | Business | Parameter | ☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

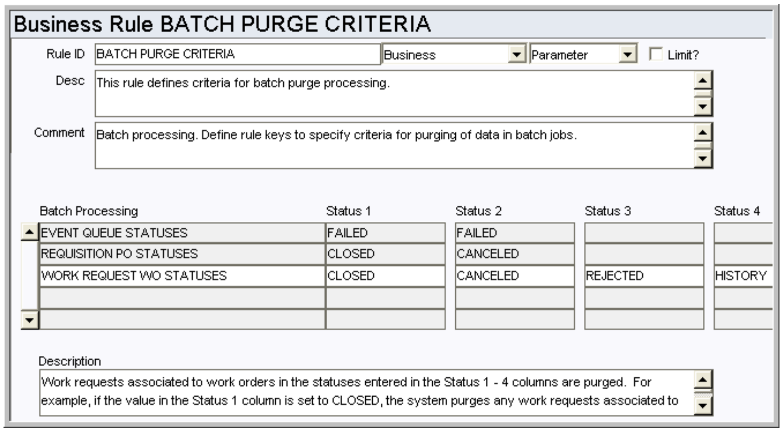
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Batch Purge Criteria Rule



Business Rule BATCH PURGE CRITERIA

Rule ID: BATCH PURGE CRITERIA

Business

Parameter

☐ Limit?

Desc: This rule defines criteria for batch purge processing.

Comment: Batch processing. Define rule keys to specify criteria for purging of data in batch jobs.

Batch Processing	Status 1	Status 2	Status 3	Status 4
EVENT QUEUE STATUSES	FAILED	FAILED		
REQUISITION PO STATUSES	CLOSED	CANCELED		
WORK REQUEST WO STATUSES	CLOSED	CANCELED	REJECTED	HISTORY

Description: Work requests associated to work orders in the statuses entered in the Status 1 - 4 columns are purged. For example, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to

Define the status values which determine when to delete obsolete data. Records are deleted when batch purge processing runs. Enter the applicable statuses in the Status 1, Status 2, and Status 3 columns for each record type. For example, for work requests, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to work orders in CLOSED status.

Batch Processing

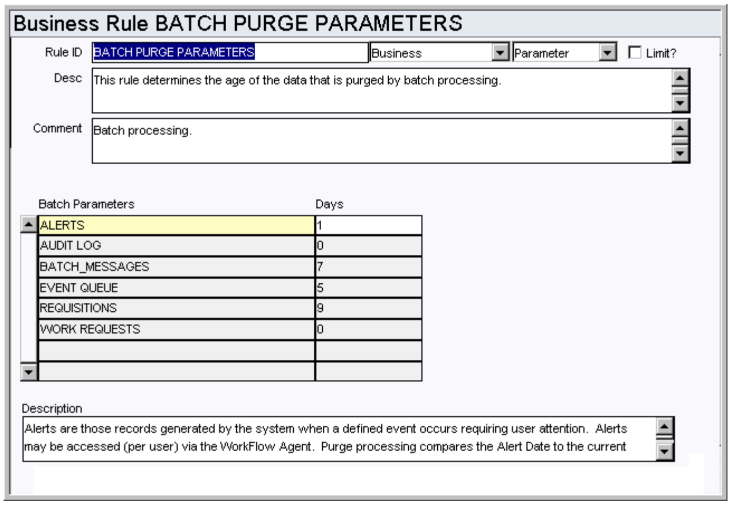
EVENT QUEUE STATUSES - Delete event queue entries that are in the statuses identified in the status columns.

REQUISITION PO STATUSES - Delete requisitions associated with purchase orders in the statuses identified in the status columns. Typically, Requisitions are considered unnecessary after the PO has been CLOSED or CANCELED.

WORK REQUEST WO STATUSES - Delete work requests associated to work orders that are in the statuses identified in the status columns. Recommended options for Status 1 - 4 include work orders in CLOSED, CANCELED, HISTORY, or REJECTED status. Although it is possible, it is NOT recommended that you purge work requests associated to work orders in PLANNING, PENDING APPROVAL, APPROVED, ACTIVE or FINISHED status.

STATUS 1, STATUS 2, STATUS 3 - These columns indicate the statuses for the records that are purged. Status 1 is the prime status to be deleted. Status 2 and 3 are other desired statuses.

Batch Purge Parameters Rule



Business Rule BATCH PURGE PARAMETERS

Rule ID: BATCH PURGE PARAMETERS | Business | Parameter | ☐ Limit?

Desc: This rule determines the age of the data that is purged by batch processing.

Comment: Batch processing.

Batch Parameters	Days
ALERTS	1
AUDIT LOG	0
BATCH_MESSAGES	7
EVENT QUEUE	5
REQUISITIONS	9
WORK REQUESTS	0

Description: Alerts are those records generated by the system when a defined event occurs requiring user attention. Alerts may be accessed (per user) via the WorkFlow Agent. Purge processing compares the Alert Date to the current

As system data ages, it often becomes of little or no value to users. Purging old data regularly prevents tables from growing too large and helps maintain a quick system response time when querying those tables.

The Batch Purge Parameters Rule defines, per specific type of data, the age of a record before batch processes purges it. Note that the specific routines called for purging are already defined, purging either a single record at a time or a header record and its associated view, whichever is appropriate.

Batch Parameters and Days

ALERTS - Set the number of days the system should retain Alerts on the home page. Purge processing compares the Alert Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

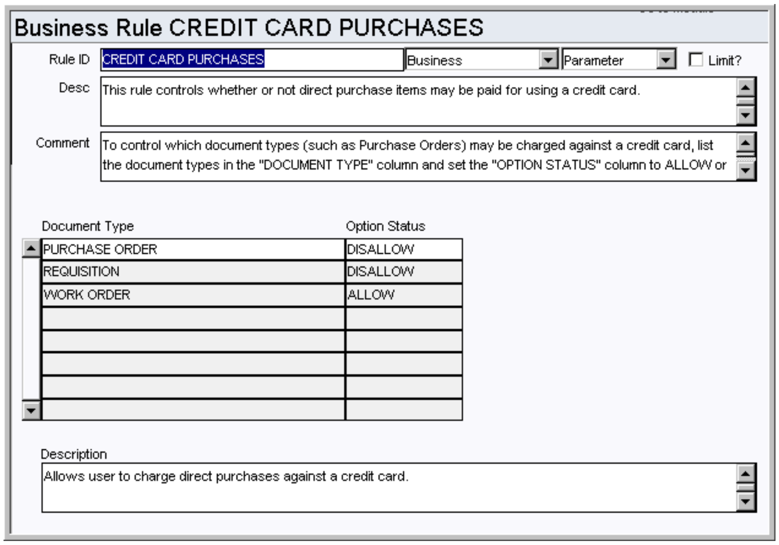
AUDIT LOG - Set the number of days the system should retain Audit Log entries. Purge processing compares the date that the entry was made to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

BATCH_MESSAGES - Messages generated by batch processing and are stored as records in the Job Manager module so that you can easily access and review them at any time. Purge processing compares the Batch Message Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

REQUISITIONS - Purge Processing compares the PO Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the Requisition is deleted from the system.

WORK REQUESTS - Purge Processing compares the Work Order Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the work request is deleted from the system.

Credit Card Purchases Rule



Business Rule CREDIT CARD PURCHASES

Rule ID: CREDIT CARD PURCHASES | Business | Parameter | ☐ Limit?

Desc: This rule controls whether or not direct purchase items may be paid for using a credit card.

Comment: To control which document types (such as Purchase Orders) may be charged against a credit card, list the document types in the "DOCUMENT TYPE" column and set the "OPTION STATUS" column to ALLOW or

Document Type	Option Status
PURCHASE ORDER	DISALLOW
REQUISITION	DISALLOW
WORK ORDER	ALLOW

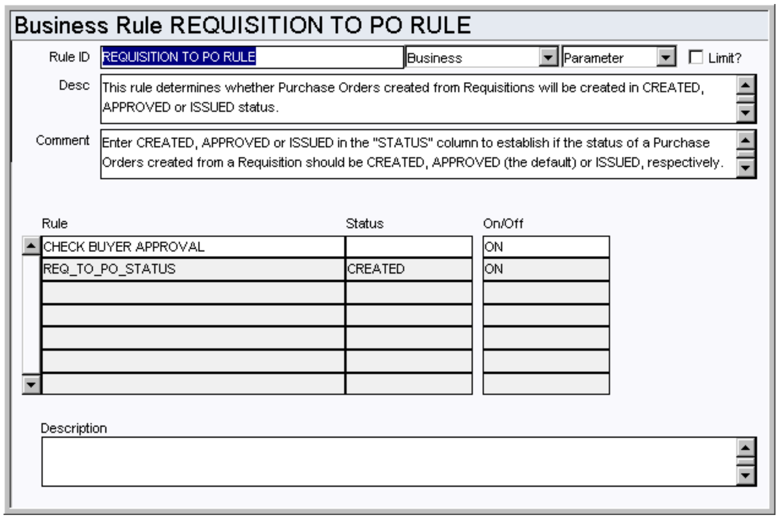
Description: Allows user to charge direct purchases against a credit card.

Control which type of documents are valid for direct purchase items to be paid for using a credit card. Direct Purchase items can be paid for using a credit card number (associated with an Employee record) as the charge number.

Document Type and Option Status

PURCHASE ORDER, REQUISITION, WORK ORDER - Allows or prevents users from charging direct purchases against a credit card. Enter ALLOW to enable charging of direct purchases to credit card numbers or DISALLOW to prevent it for each document type.

Requisition to PO Rule



Business Rule REQUISITION TO PO RULE

Rule ID: REQUISITION TO PO RULE | Business | Parameter | ☐ Limit?

Desc: This rule determines whether Purchase Orders created from Requisitions will be created in CREATED, APPROVED or ISSUED status.

Comment: Enter CREATED, APPROVED or ISSUED in the "STATUS" column to establish if the status of a Purchase Orders created from a Requisition should be CREATED, APPROVED (the default) or ISSUED, respectively.

Rule	Status	On/Off
CHECK BUYER APPROVAL		ON
REQ_TO_PO_STATUS	CREATED	ON

Description:

Determine whether Purchase Order records created from requisitions will be created in Created, Approved or Issued status.

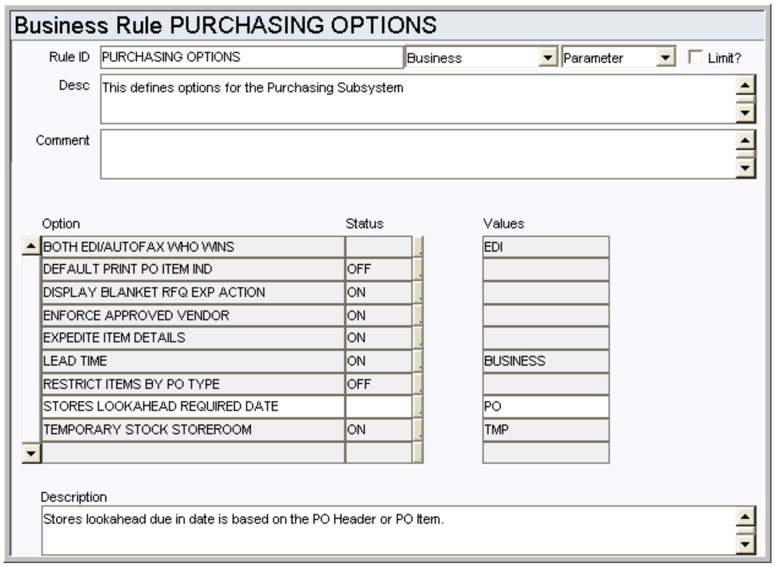
Check Buyer Approval

Enter ON or OFF in the “ON/OFF” column. The approval limit is always checked for the Requisition irrespective of whether the rule is ON or OFF. If the rule key is set to ON, the PO Approval limit is also checked. If it is set to off OFF only the requisition approval limit is checked.

Req_To_PO_Status

Enter Created, Approved, or Issued in the Status column to indicate which status Purchase Order records created from requisitions should be created in.

Purchasing Options Rule



Business Rule PURCHASING OPTIONS

Rule ID: PURCHASING OPTIONS | Business | Parameter | ☐ Limit?

Desc: This defines options for the Purchasing Subsystem

Comment:

Option	Status	Values
BOTH EDI/AUTOFAX WHO WINS		EDI
DEFAULT PRINT PO ITEM IND	OFF	
DISPLAY BLANKET RFQ EXP ACTION	ON	
ENFORCE APPROVED VENDOR	ON	
EXPEDITE ITEM DETAILS	ON	
LEAD TIME	ON	BUSINESS
RESTRICT ITEMS BY PO TYPE	OFF	
STORES LOOKAHEAD REQUIRED DATE		PO
TEMPORARY STOCK STOREROOM	ON	TMP

Description: Stores lookahead due in date is based on the PO Header or PO Item.

Set purchasing options.

For descriptions of the remaining rule keys please refer to the Purchase Order module configuration.

Option, Status, and Value

ACCOUNTS REQUIRED ON PENDING - This rule determines when the system checks for valid account splits on purchasing records. When it is set to ON, changing to Pending Approval status triggers the validation. When it is set to OFF the system validates accounts when the record is changed to Approved status. The default setting is “ON”.

STORES LOOKAHEAD REQUIRED DATE - This rule key determines which date is used as the promised date for items on a purchase order. Set the key to PO to use the promise date on the purchase order header for every item. Set the key to PO ITEM to use the promise date from each individual purchase order line item.

Code Tables

Code Table 7: Location (Length = 10)

Deliver to Location field - Define codes to designate possible delivery locations within your organization. Typical entries include: “North side loading dock” or “Main Warehouse”.

Code Table 23: Unit of Measure (Line Item (Detail) View) (Length = 4)

Unit of Purchase (UOP) and Unit of Issue (UOI) fields - Define units codes. These fields are used by the system to maintain quantities as parts are issued and new parts are received. You may, for instance, issue in units of each ('EA') but order in units of boxes ('BOX') where one box would contain 10 individual items. Code Table 23 enables you to define the different Units of Purchase and Units of Issue.

Code Table 26: End Use Code (Buyer Data View) (Length = 2)

End Use Code field - Define codes to identify where items for the requisition are to be used in the plant. Examples include: 'D' for Specific Department Usage, 'P' Plant Wide Usage, etc.

Code Table 43: FOB (Buyer Data View)

FOB (Free On Board) field - Define codes to designate from which point the Buyer pays for the delivery charges. This code table is typically populated with Vendor and Buyer locations.

Code Table 159: Federal Tax Codes (Buyer Data View) (Length = 1)

Federal field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 160: State Tax Codes (Buyer Data View) (Length = 1)

State field - The code can only be one character and the Description should contain the percentage rate in the first six characters of the field.

Code Table 161: Duty Codes (Buyer Data View) (Length = 1)

Duty field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Create Req from Blanket

Grants the ability to create a requisition from an active Blanket Contract record.

Create Shipping Memo

Grants access to the action which allows users to create a shipping memo from a requisition.

Create Templates from REQ

Grants the ability to create a template from a Requisition using the Copy Record action in the Requisition module.

Resend Approval Request

Grants the ability to resend an Approval Request using the Resend Approval Request Action in the Requisition module.

Batch Processes

Purge Requisitions - sdbp_purge_requisitions;

Enable or disable a batch job to purge Requisitions in PO Created status where the PO is in a certain status. The status and age are defined in the Batch Purge Parameters and Batch Purge Criteria Business Rules.

Requisition Template Status Check - sdbp_req_template_status_chk;

Allows you to automatically activate/de-activate Requisition Template records based on its duration values.

Metrics

S_MTRC3 - Total Lead Time - sdbp_metric_total_lead_time

This metric is to provide an average lead-time (in days) for the entire purchasing process (approved Requisition to first PO receipt). It provides a means to monitor and improve the total time (internal and external) required to receive items for an approved Requisition.

Reports

S_RPT054 - Requisition Report

This report is similar to the Purchase Order Report except space is provided at bottom for approval signatures and is typically used for internal routing purposes. Please refer to topics regarding the PO Report Constants and PO Report Status Codes Business Rules for more information on this report.

S_RPT215 - Requisition Report (by Vendor)

Summarizes open Requisitions by Vendor.

Purchase Order Module

Fields

Sequence No.: Purchase Order

The record number is comprised of a unique ID (Ex. "02001027"). Purchase order numbers must be system generated. Manual creation of these record numbers could result in critical system errors when POs are created from other records or in batch procedures.

> **TABLE NAME** - SA_PURCHASE_ORDER- The sequence number is generated for this database.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Approval Route Field

Designate approvers for purchase orders in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Buyer field

Make sure to populate the Buyer module with codes for Buyers responsible for purchasing documents.

Ship To field

The List of Values for the Ship To field is controlled by active storerooms entered in the Storeroom module of the Resource subsystem.

Currency (Buyer Data View)

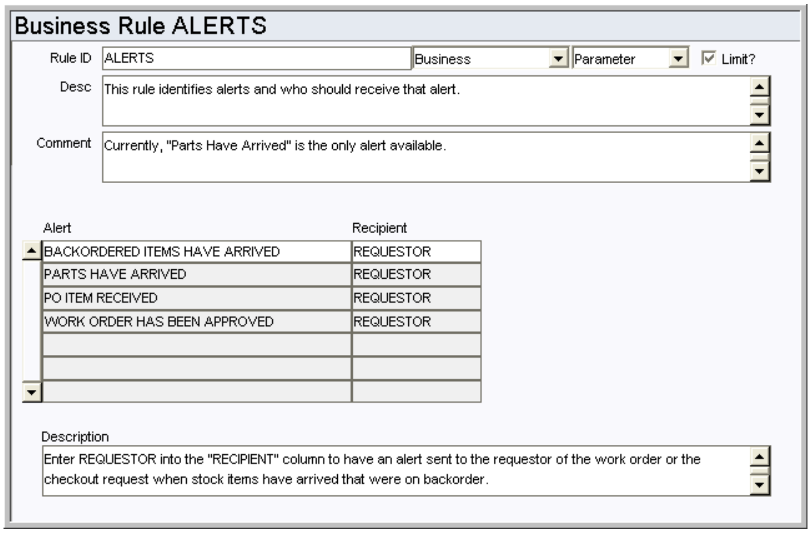
Currency Codes are defined and updated in the Currency Exchange Rates module.

User-Defined

If you use user-defined fields in the Purchase Order module AND you use Multi-Step Receiving, you must make sure that both modules have the same user defined fields. Please refer to the Configuration Guide for User-Defined fields for more information.

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS | Business | Parameter | ☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

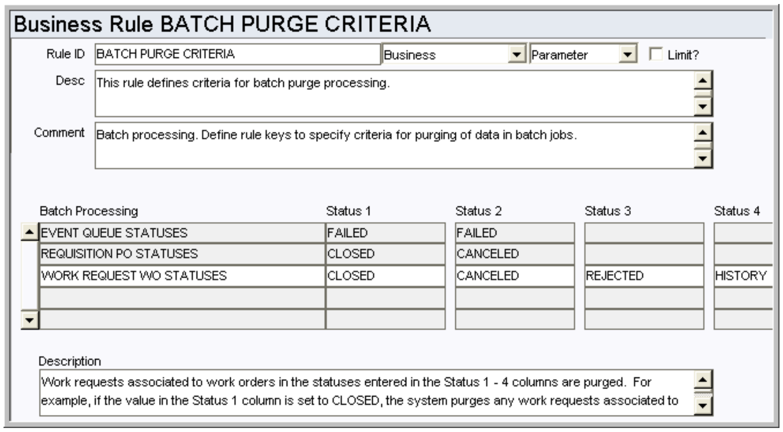
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Batch Purge Criteria Rule



Business Rule BATCH PURGE CRITERIA

Rule ID: BATCH PURGE CRITERIA | Business | Parameter | ☐ Limit?

Desc: This rule defines criteria for batch purge processing.

Comment: Batch processing. Define rule keys to specify criteria for purging of data in batch jobs.

Batch Processing	Status 1	Status 2	Status 3	Status 4
EVENT QUEUE STATUSES	FAILED	FAILED		
REQUISITION PO STATUSES	CLOSED	CANCELED		
WORK REQUEST WO STATUSES	CLOSED	CANCELED	REJECTED	HISTORY

Description: Work requests associated to work orders in the statuses entered in the Status 1 - 4 columns are purged. For example, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to

Define the status values which determine when to delete obsolete data. Records are deleted when batch purge processing runs. Enter the applicable statuses in the Status 1, Status 2, and Status 3 columns for each record type. For example, for work requests, if the value in the Status 1 column is set to CLOSED, the system purges any work requests associated to work orders in CLOSED status.

Batch Processing

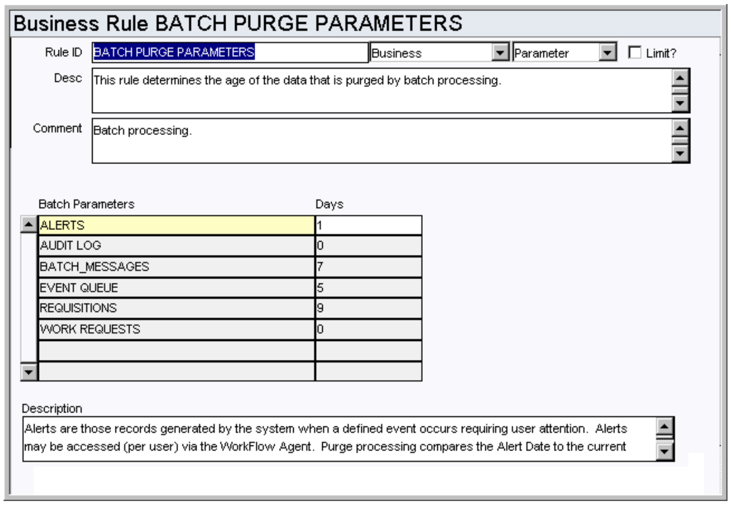
EVENT QUEUE STATUSES - Delete event queue entries that are in the statuses identified in the status columns.

REQUISITION PO STATUSES - Delete requisitions associated with purchase orders in the statuses identified in the status columns. Typically, Requisitions are considered unnecessary after the PO has been CLOSED or CANCELED.

WORK REQUEST WO STATUSES - Delete work requests associated to work orders that are in the statuses identified in the status columns. Recommended options for Status 1 - 4 include work orders in CLOSED, CANCELED, HISTORY, or REJECTED status. Although it is possible, it is NOT recommended that you purge work requests associated to work orders in PLANNING, PENDING APPROVAL, APPROVED, ACTIVE or FINISHED status.

STATUS 1, STATUS 2, STATUS 3 - These columns indicate the statuses for the records that are purged. Status 1 is the prime status to be deleted. Status 2 and 3 are other desired statuses.

Batch Purge Parameters Rule



Business Rule BATCH PURGE PARAMETERS

Rule ID: BATCH PURGE PARAMETERS | Business | Parameter | ☐ Limit?

Desc: This rule determines the age of the data that is purged by batch processing.

Comment: Batch processing.

Batch Parameters	Days
ALERTS	1
AUDIT LOG	0
BATCH_MESSAGES	7
EVENT QUEUE	5
REQUISITIONS	9
WORK REQUESTS	0

Description: Alerts are those records generated by the system when a defined event occurs requiring user attention. Alerts may be accessed (per user) via the WorkFlow Agent. Purge processing compares the Alert Date to the current

As system data ages, it often becomes of little or no value to users. Purging old data regularly prevents tables from growing too large and helps maintain a quick system response time when querying those tables.

The Batch Purge Parameters Rule defines, per specific type of data, the age of a record before batch processes purges it. Note that the specific routines called for purging are already defined, purging either a single record at a time or a header record and its associated view, whichever is appropriate.

Batch Parameters and Days

ALERTS - Set the number of days the system should retain Alerts on the home page. Purge processing compares the Alert Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

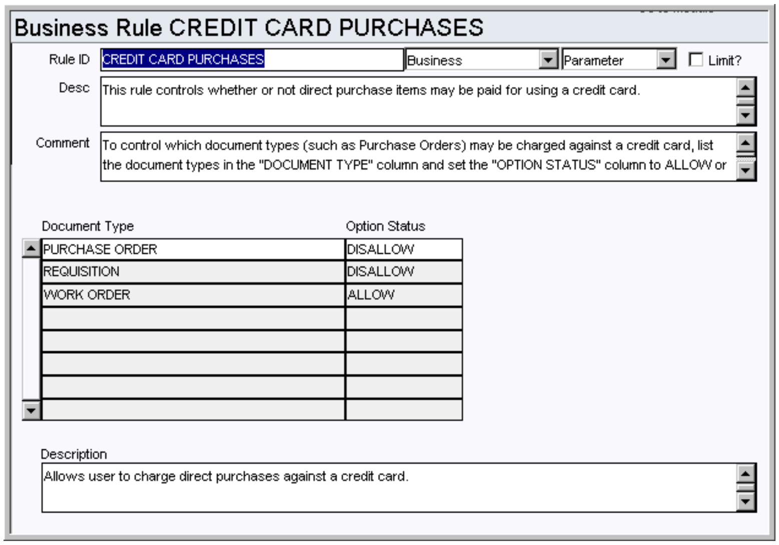
AUDIT LOG - Set the number of days the system should retain Audit Log entries. Purge processing compares the date that the entry was made to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

BATCH_MESSAGES - Messages generated by batch processing and are stored as records in the Job Manager module so that you can easily access and review them at any time. Purge processing compares the Batch Message Date to the current date minus the number of days listed in the DAYS column, and deletes any messages that fall outside of that range.

REQUISITIONS - Purge Processing compares the PO Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the Requisition is deleted from the system.

WORK REQUESTS - Purge Processing compares the Work Order Status Date (for status settings in the Batch Purge Criteria business rule) to the current date. When the result is greater than the number of days listed in the DAYS column, the work request is deleted from the system.

Credit Card Purchases Rule



Business Rule CREDIT CARD PURCHASES

Rule ID: CREDIT CARD PURCHASES | Business | Parameter | ☐ Limit?

Desc: This rule controls whether or not direct purchase items may be paid for using a credit card.

Comment: To control which document types (such as Purchase Orders) may be charged against a credit card, list the document types in the "DOCUMENT TYPE" column and set the "OPTION STATUS" column to ALLOW or

Document Type	Option Status
PURCHASE ORDER	DISALLOW
REQUISITION	DISALLOW
WORK ORDER	ALLOW

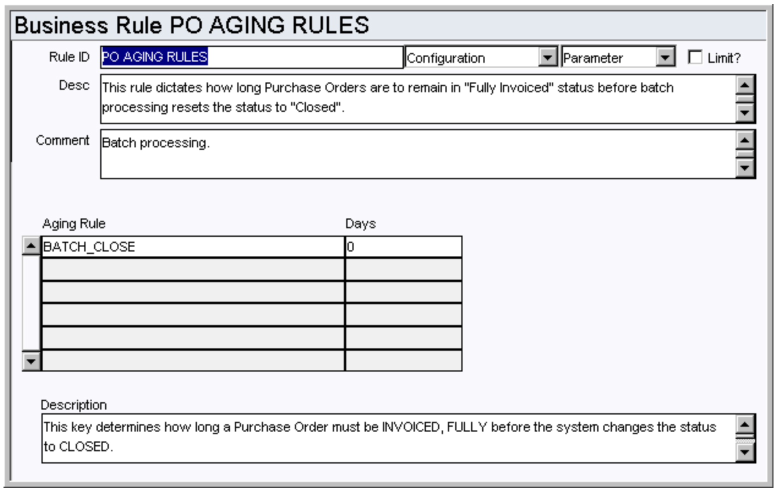
Description: Allows user to charge direct purchases against a credit card.

Control which type of documents are valid for direct purchase items to be paid for using a credit card. Direct Purchase items can be paid for using a credit card number (associated with an Employee record) as the charge number.

Document Type and Option Status

PURCHASE ORDER, REQUISITION, WORK ORDER - Allows or prevents users from charging direct purchases against a credit card. Enter ALLOW to enable charging of direct purchases to credit card numbers or DISALLOW to prevent it for each document type.

PO Aging Rules Rule



Business Rule PO AGING RULES

Rule ID: PO AGING RULES | Configuration | Parameter | ☐ Limit?

Desc: This rule dictates how long Purchase Orders are to remain in "Fully Invoiced" status before batch processing resets the status to "Closed".

Comment: Batch processing.

Aging Rule	Days
BATCH_CLOSE	0

Description: This key determines how long a Purchase Order must be INVOICED, FULLY before the system changes the status to CLOSED.

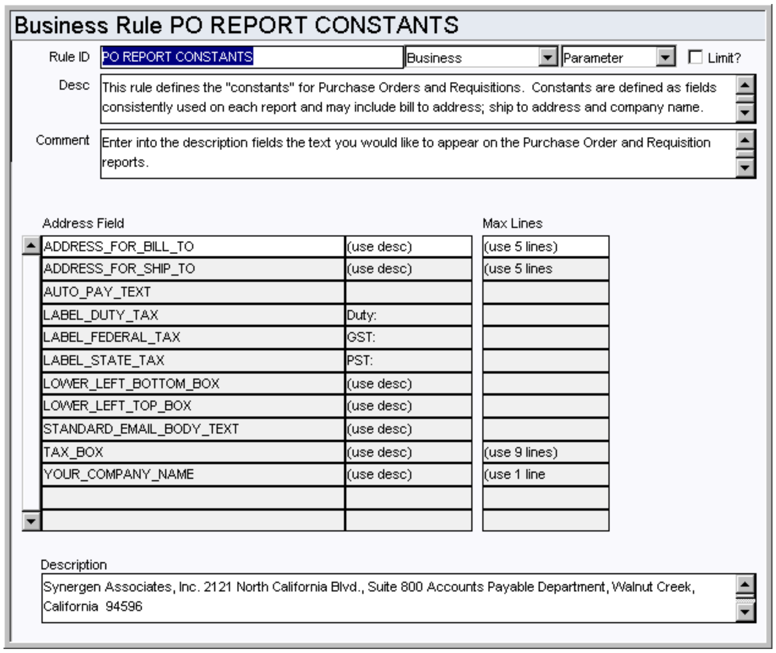
Control the amount of time that Purchase Order records will remain in FULLY INVOICED status, before batch processing sets the PO status to CLOSED.

After a Purchase Order reaches Fully Invoiced status, it remains in this status for the number of days defined in this rule. After the defined number of days, batch processing updates the Purchase Order status to Closed.

Aging Rule and Days

BATCH_CLOSE - the process trigger used by the system to find the Purchase Order Aging value and determine if a PO qualifies to be set to CLOSED status. Simply enter the number of aging days that the PO is to remain in FULLY INVOICED status in the DAYS column.

PO Report Constants Rule



Business Rule PO REPORT CONSTANTS

Rule ID	PO REPORT CONSTANTS · Business · Parameter · ☐ Limit?
Desc	This rule defines the "constants" for Purchase Orders and Requisitions. Constants are defined as fields consistently used on each report and may include bill to address; ship to address and company name.
Comment	Enter into the description fields the text you would like to appear on the Purchase Order and Requisition reports.

Address Field		Max Lines
ADDRESS_FOR_BILL_TO	(use desc)	(use 5 lines)
ADDRESS_FOR_SHIP_TO	(use desc)	(use 5 lines
AUTO_PAY_TEXT		
LABEL_DUTY_TAX	Duty:	
LABEL_FEDERAL_TAX	GST:	
LABEL_STATE_TAX	PST:	
LOWER_LEFT_BOTTOM_BOX	(use desc)	
LOWER_LEFT_TOP_BOX	(use desc)	
STANDARD_EMAIL_BODY_TEXT	(use desc)	
TAX_BOX	(use desc)	(use 9 lines)
YOUR_COMPANY_NAME	(use desc)	(use 1 line

Description: Synergen Associates, Inc. 2121 North California Blvd., Suite 800 Accounts Payable Department, Walnut Creek, California 94596

Define constants for POs and Requisitions to avoid repetitious data entry on these records. Constants are defined as fields consistently used on each report and may include values such as Bill To Address or Company Name.

Highlight a Rule Key and enter the text that you want to have appear on the Purchase Order and Requisition reports for that parameter in the Description field at the bottom of the screen.

Address Field and Max Lines

ADDRESS_FOR_BILL_TO - Use the description field to enter the address that should be printed on each report. The system first looks at the storeroom setup record for a Bill To Address. If no address is found, the ADDRESS_FOR_BILL_TO address field is used.

ADDRESS_FOR_SHIP_TO - Use the description field to enter the ship to address that should be printed on each report. The system first looks at the storeroom setup record for a Ship To Address. If no address is found, the ADDRESS_FOR_SHIP_TO address field is used.

AUTO_PAY-TEXT - Use the description field to enter the text that should appear on automatic invoices.

LABEL_DUTY_TAX - Use the description field to enter the label for the duty rate. The value entered for the LABEL_DUTY_TAX address field will be used throughout the application as well as on reports. For example, this the label entered here will display on the Design Estimate view in the Work Design module or the Line Item (Detail) on a Purchase Order record. If no value is entered here “Duty” is used as the default label.

LABEL_FEDERAL_TAX - Use the description field to enter the label for the federal tax rate.

LABEL_STATE_TAX - Use the description field to enter the label for the state tax rate.

LOWER_LEFT_BOTTOM_BOX - Use the description field to enter any information that you want to appear in the large box on the bottom left hand side of the Purchase Order and Requisition Reports. This box can be used as desired. For example, invoicing information could be referenced.

LOWER_LEFT_TOP_BOX - Use the description field to enter any information that you want to appear in the smaller box on the bottom left-hand side of the purchase order and requisition reports. For example, reminders or announcements could be indicated.

STANDARD_EMAIL_BODY_TEXT - Use the description field to enter the text that will appear in the message when you e-mail a Purchase Order to a vendor.

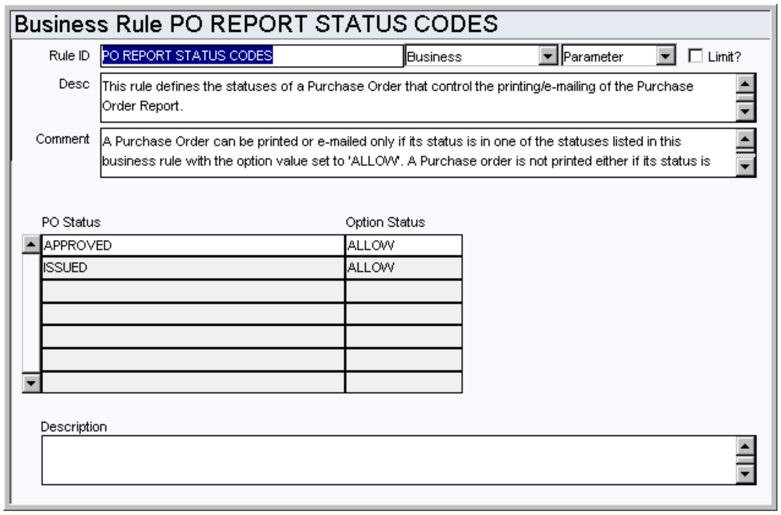
TAX_BOX - Use the description field to enter the text that should appear with Tax information on PO reports.

YOUR_COMPANY_NAME - Use the description field to enter the company name that should appear at the top of the of the Purchase Order and Requisition Reports as well as in the subject line of e-mails with Purchase Orders sent to Vendors.

Max Lines

This column defines the number of lines in the description field that will be retrieved and inserted into the Purchase Order and Requisition Report.

PO Report Status Codes Rule



Business Rule PO REPORT STATUS CODES

Rule ID: PO REPORT STATUS CODES

Business

Parameter

☐ Limit?

Desc: This rule defines the statuses of a Purchase Order that control the printing/e-mailing of the Purchase Order Report.

Comment: A Purchase Order can be printed or e-mailed only if its status is in one of the statuses listed in this business rule with the option value set to 'ALLOW'. A Purchase order is not printed either if its status is

PO Status	Option Status
APPROVED	ALLOW
ISSUED	ALLOW

Description

Define when Purchase Orders can be printed.

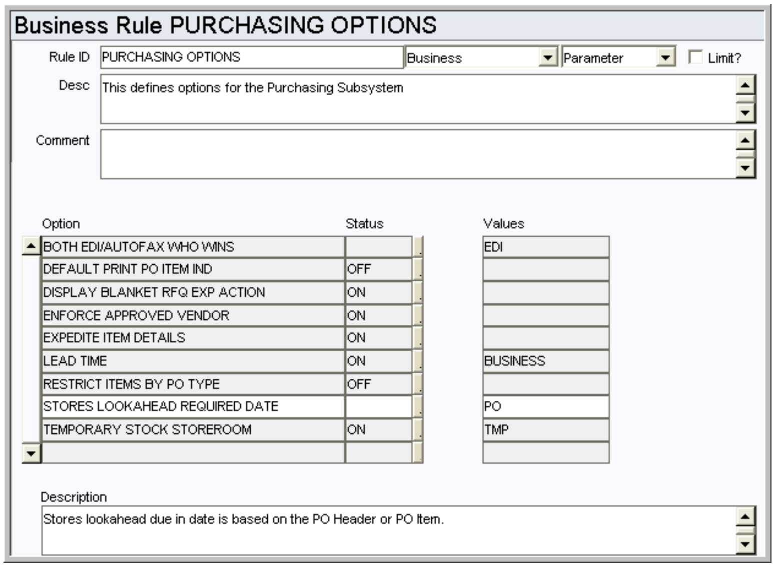
A Purchase Order can only be printed when it is in one of the statuses listed in this Business Rule with the option value set to ALLOW.

This rule also controls which PO numbers appear in the Purchase Order Number List of Values on the selection screen for S_RPT053. For example, if the Option Status for PO Status Approved is set to DISALLOW, Purchase Orders in Approved status will not show on the lists of values when you are selecting options for this report.

PO Status and Option Status

Purchase Order statuses include: APPROVED, CANCELED, CLOSED, CREATED, INVOICED, ISSUED, PENDING APPROVAL, and RECEIVED. Select a status then enter either ALLOW or DISALLOW in the Option Status field to determine when a PO in that status can be printed.

Purchasing Options Rule



Business Rule PURCHASING OPTIONS

Rule ID: PURCHASING OPTIONS | Business | Parameter | ☐ Limit?

Desc: This defines options for the Purchasing Subsystem

Comment:

Option	Status	Values
BOTH EDI/AUTOFAX WHO WINS		EDI
DEFAULT PRINT PO ITEM IND	OFF	
DISPLAY BLANKET RFQ EXP ACTION	ON	
ENFORCE APPROVED VENDOR	ON	
EXPEDITE ITEM DETAILS	ON	
LEAD TIME	ON	BUSINESS
RESTRICT ITEMS BY PO TYPE	OFF	
STORES LOOKAHEAD REQUIRED DATE		PO
TEMPORARY STOCK STOREROOM	ON	TMP

Description: Stores lookahead due in date is based on the PO Header or PO Item.

Control the parameters related to Purchasing subsystem functionality.

Option, Status, and Value

ACCOUNTS REQUIRED ON PENDING - This rule determines when the system checks for valid account splits on purchasing records. When it is set to ON, changing to Pending Approval status triggers the validation. When it is set to OFF the system validates accounts when the record is changed to Approved status. The default setting is “ON”.

BOTH EDI/AUTOFAX WHO WINS - This rule key determines whether EDI or Auto-fax will be used, if both are available methods to transmit purchasing documents.

DEFAULT PRINT PO ITEM IND - This rule key determines the default setting of the Print Line Item indicator when a Purchase Order is copied to a Change Order.

DISPLAY BLANKET RFQ EXP ACTION - When this rule key is set to ON the Export Blkt RFQ to File action is displayed on the Actions list in the Request for Quotes module. This action allows users to export the Blanket RFQ data to an Excel spreadsheet.

ENFORCE APPROVED VENDOR - This line determines if the approved vendor limitation will be enforced for purchasing documents during online and batch processing. When the status is set to ON, if any item on a PO (or other purchasing document) requires an approved vendor, as defined by the procurement level field, then the entire PO requires an approved vendor. The approved vendor requirement will be enforced when the PO is issued. Only users with an Approval Title with the document type AVOVERRIDE have the option of dismissing the requirement.

EXPEDITE ITEM DETAILS - This rule key determines whether or not there are item details for purchase expedite records. When the status is set to ON, the system provides a View to the PO Expediting module in the Purchasing subsystem. This view can be used for tracking partial shipments, and an informational version of the window is also offered as a view of the Purchase Order module in the Purchasing subsystem.

LEAD TIME - The lead time indicates whether the system will calculate a default Promise Date on Purchase Orders created through using batch processing and Blanket Contracts. If the value is set to CALENDAR, all days are included in the calculation of the promise date.

RESTRICT ITEMS BY PO TYPE - This rule key determines whether or not the system enforces restrictions on the stock types and PO Line types that you can include on a Requisition, Purchase Order, and other Purchasing documents.

When the status is set to ON, only P and W type requisitions/purchase orders allow direct type items. S type requisitions/purchase orders only allow inventory or expense items. For B, P, V, and W purchase types, the system only allows Stock Codes to be entered with the Materials PO Line type.

When the status is set to OFF, then you can combine stock types (Direct, Inventory, and Expense), purchase types (B, P, S, V, and W), and PO Line types (Materials, Services, and Misc.) without restrictions.

The status does not affect S and W type purchasing documents generated by Batch Processing.

STORES LOOKAHEAD REQUIRED DATE - This rule key determines which date is used as the promised date for items on a purchase order. Set the key to PO to use the promise date on the purchase order header for every item. Set the key to PO ITEM to use the promise date from each individual purchase order line item.

TEMPORARY STOCK STOREROOM - If the storeroom is identified and this rule key is set to ON, direct purchase items are allocated to the original purchase order to ensure proper issuance of the material upon receipt. Only Active storerooms with Direct stock type can be chosen from the list of values.

Code Tables

Code Table 7: Location (Length = 10)

Deliver to Location field - Define codes to designate possible delivery locations within your organization. Typical entries include: “North side loading dock” or “Main Warehouse”.

Code Table 23: Unit of Measure (Line Item (Detail) View) (Length = 4)

Unit of Purchase (UOP) and Unit of Issue (UOI) fields - Define units codes. These fields are used by the system to maintain quantities as parts are issued and new parts are received. You may, for instance, issue in units of each ('EA') but order in units of boxes ('BOX') where one box would contain 10 individual items. Code Table 23 enables you to define the different Units of Purchase and Units of Issue.

Code Table 26: End Use Code (Buyer Data View) (Length = 2)

End Use Code field - Define codes to identify where items for the requisition are to be used in the plant. Examples include: 'D' for Specific Department Usage, 'P' Plant Wide Usage, etc.

Code Table 43: FOB (Buyer Data View) (Length = 20)

F.O.B. (Free On Board) designates from which point the Buyer pays for the delivery charges. This code table is typically populated with Vendor and Buyer locations.

Code Table 150: Confirmation Types (Buyer Data View) (Length = 10)

Confirmation Type field - Define codes to indicate how the vendor was contacted for confirmation. Typical entries include phone, fax, e-mail.

Code Table 154: Expediting Item Status (Expedite View, Expedite Items Detail) (Length = 15)

Status field - This code table relates to the status of the expedited items. The code table is attached to the Status Code field and some examples of data are: Backorder, Ready, and Shipped.

Code Table 159: Federal Tax Codes (Buyer Data View) (Length = 1)

Federal field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 160: State Tax Codes (Buyer Data View) (Length = 1)

State field - The code can only be one character and the Description should contain the percentage rate in the first six characters of the field.

Code Table 161: Duty Codes (Buyer Data View) (Length = 1)

Duty field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Change PO Auto Pay Indicator

Grants the ability to change a vendor's auto pay flag on Purchase Order records.

Copy PO from PO

Grants the ability to copy Purchase Orders using the Copy Record action.

Transfer Canceled PO Items

Grants the ability to transfer canceled Purchase Order items.

Resend Approval Request

Grants the ability to resend an Approval Request using the Resend Approval Request action in the Purchase Order module.

Batch Processes

Purge Requisitions - sdbp_purge_requisitions;

Enable or disable a batch job to purge Requisitions in PO Created status where the PO is in a certain status. The status and age are defined in the Batch Purge Parameters and Batch Purge Criteria Business Rules.

Vendor Performance - sdbp_vendor_performance;

Supports the gathering of Vendor Performance statistics. This procedure performs the following:

- Identifies the processing parameters for the Current Rating Period for Active Vendors.
- Updates Quality Performance data based on changes since the last batch run.
- Updates Delivery Performance data for new transactions.
- Updates Quality Performance data for new transactions.

Check Received PO Item - sdbp_chk_issd_po_item;

Sends an alert to the PO Item Requestor if the PO is fully received. This procedure looks for all issued PO records. For each PO line item with the field Receipts-Fully Received = Y, an Alert will be sent to the Requestor via the home page inbox. If the Requestor is invalid or null, a message will go to the job manager. The field Sent Alert Indicator on the PO Item is set to Y after an Alert/Job Log Message is sent. The Alert will only be sent once.

PO Closeout - sdbp_po_closeout;
Reviews Purchase Orders, setting the header status to Received, Fully , Invoice, Fully , or Closed as appropriate. Before a Purchase Order is set to Closed status, it must remain in Invoiced, Fully status for the number of days defined in the PO Aging Business Rule.

Charts

S_CHT133 - PO By Buyer - Total Amount
The Total Amount of Purchase Orders for the current year and the previous year. The data can be filtered by Plant and Buyer. There are also other filtering options such as Vendor Code, available in the Chart Field List.

S_CHT134 - PO By Buyer - Count of POs
The count of Purchase Orders for the current year and the previous year. The data can be filtered by Plant and Buyer. Other filtering options, such as Vendor Code, are available in the Chart Field List.

S_CHT135 - PO By Vendor - Total Amount
Shows the Total Amount of Purchase Orders for the current year and the previous year. The data can be filtered further by Plant and Vendor Name. Other filtering options, such as Buyer, PO Type and PO Status, are available in the Chart Field List.

S_CHT1136 - PO By Vendor - Count of POs
A count of Purchase Orders for the current year and previous years. The data can be filtered further by Plant and Vendor Name. Other filtering options, such as Buyer, PO Type and PO Status, are available in the Chart Field List.

Metrics

S_MTRC2 - Internal Time to Issue PO - sdbp_metric_int_time_to_issue
This metric is to provide an average lead-time (in days) for Purchase Order creation (approved Requisition to issued PO). It provides a means to monitor and improve the internal time required to issue a PO for an approved Requisition.

S_MTRC3 - Total Lead Time - sdbp_metric_total_lead_time
This metric is to provide an average lead-time (in days) for the entire purchasing process (approved Requisition to first PO receipt). It provides a means to monitor and improve the total time (internal and external) required to receive items for an approved Requisition.

S_MTRC4 - External Time to Receive Parts - sdbp_metric_ext_time_rec_part
This metric is to provide an average lead-time (in days) for external purchasing. It provides a means to monitor and improve the external lead-time for Purchase Orders.

Reports

S_RPT105 - Accruals By Account Report
Displays accrued account totals for individual POs.

S_RPT214 - Contract PO Activity Report
Summarizes Purchase Order activity against Blanket Contracts.

S_RPT107 - Delivery Receiving Report
Summarizes Purchase Order and Receiving information for selected Receiving sessions.

S_RPT027 - Delivery Ticket Report
Displays a Delivery Ticket that can be left with the Requestor when PO line items are delivered.

S_RPT212 - Open Purchase Orders Detail Report
Displays a detailed review of Purchase Orders that have not yet been completed.

S_RPT211 - Open Purchase Orders Summary Report
Displays a Summary of Purchase Orders that have not yet been completed.

S_RPT024 - Purchase Order Accruals (Unpaid Receipts) Report
Lists Purchase Orders with items that are not fully invoiced.

S_RPT062 - Purchase Order Accruals (Unpaid POs) Report
Provides a summary of the accruals based on open purchase orders.

S_RPT204 - Purchase Order Expensing Account Detail Report
Lists Purchase Orders by Expense Code.

S_RPT202 - Purchase Order Inventory Item Cost Report
Displays Cost Summaries of all Purchase Orders made for "stocked" items to compare current purchase price with average unit price and calculate the price variance.

S_RPT203 - Purchase Order Listing Report - Grouped by PO Number
Lists Purchase Orders grouped by Purchase Order numbers then Vendor then stock code.

S_RPT201 - Purchase Order Listing Report - Grouped by Vendor Code
Displays a summary of all Purchase Orders Grouped by Vendor Code.

S_RPT029 - Purchase Order Over Received Report
Lists Purchase Orders where the quantity received is greater than the quantity ordered.

S_RPT208 - Purchase Order Report - Department Copy
This is a copy of the Purchase Order that was sent to the Vendor.

S_RPT209 - Purchase Order Report - Finance Copy
This is a copy of the Purchase Order that was sent to the Vendor formatted to be sent to the accounting department.

S_RPT207 - Purchase Order Report - Vendor Copy
The Purchase Order that is sent to Vendor's when orders are made.

S_RPT200 - Purchase Order Vendor Report
Displays a Vendor summary of all Purchase Orders within a Date Range.

S_RPT053 - Purchase Order Report
Shows POs that need to be filled by a specific Vendor. Only Document Attachments and Document type Procedures will be printed on the report. The “Print?” check box must be checked.

Please see refer to the PO Report Constants and PO Report Status Codes Business Rules for more information on the Purchase Order Report.

S_RPT112 - Purchase Order Report with Standard Notes and Attachments
Lists outstanding Purchase Orders that need to be filled. Please refer to the PO Report Constants and PO Report Status Codes Business Rules for More information regarding this report.

S_RPT023 - Purchase Orders Not Yet Received Report
Lists Purchase Orders where the quantity received is less than the quantity ordered.

S_RPT010 - Purchase Orders with Returns Report
Lists Purchase Orders with items returned to the Vendor. The return may be for

Replacement or Credit.

S_RPT063 - Ready for Payment Report

Provides a listing of Purchase Orders that are ready for payment.

S_RPT025 - Receiving Report

Lists summary Purchase Order and Receiving information for selected Receiving sessions.

S_RPT216 - Receiving Report

Summarizes receiving records by Purchase Order number detailing items received, by whom, receipt date, and other applicable information.

S_RPT037 - Receiving Worksheet Report

Lists items to be received as well as any existing Receiving information.

Change Order Module

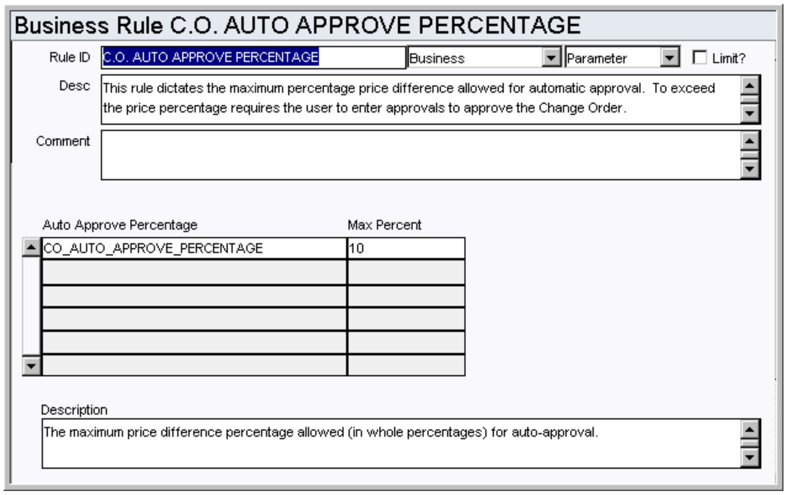
Fields

Approval Route Field

Designate approvers for Change Orders in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Business Rules

C.O. Auto Approve Percentage Rule



Business Rule C.O. AUTO APPROVE PERCENTAGE

Rule ID: C.O. AUTO APPROVE PERCENTAGE | Business | Parameter | ☐ Limit?

Desc: This rule dictates the maximum percentage price difference allowed for automatic approval. To exceed the price percentage requires the user to enter approvals to approve the Change Order.

Comment:

Auto Approve Percentage	Max Percent
CO_AUTO_APPROVE_PERCENTAGE	10

Description: The maximum price difference percentage allowed (in whole percentages) for auto-approval.

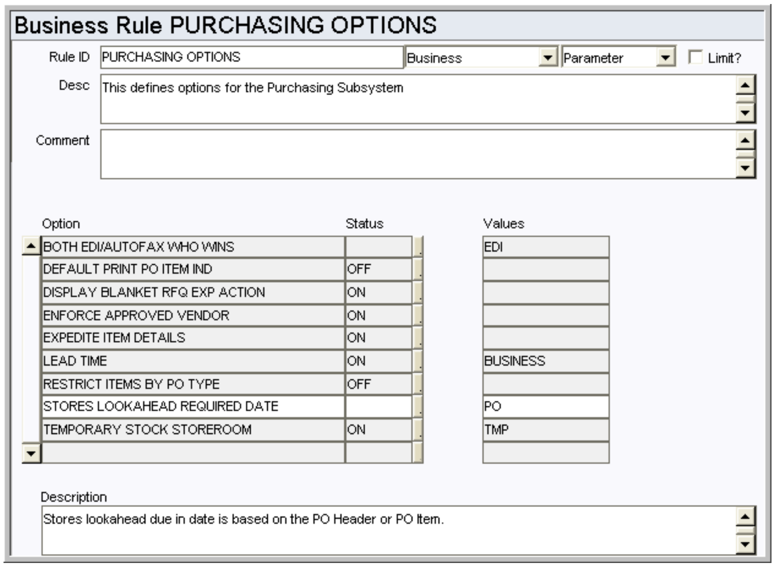
Set the percentage over the Purchase Order value at which the system will automatically approve a Change Order. When a Change Order is modified, the new Change Order total value may be different than the originating Purchase Order value. If the price difference is less than or equal to a defined percentage, the system can automatically approve the Change Order when a user sets the Change Order status to Pending Approval.

To Search for this rule on the Search Options screen make sure to include the periods in between C.O.

Auto Approve Percentage and Max Percent

CO_AUTO_APPROVE_PERCENTAGE - Enter into the MAX PERCENT column the maximum price difference allowed (as a whole number percentage) for auto-approval of Change Orders. If the new Change Order price difference exceeds this percent, users must manually enter approval information to approve the Change Order. If you do not want to allow automatic approval at any value set the Max Percent to 0%.

Purchasing Options Rule



Business Rule PURCHASING OPTIONS

Rule ID: PURCHASING OPTIONS
Business
Parameter
☐ Limit?
Desc: This defines options for the Purchasing Subsystem
Comment:

Option	Status	Values
BOTH EDI/AUTOFAX WHO WINS		EDI
DEFAULT PRINT PO ITEM IND	OFF	
DISPLAY BLANKET RFQ EXP ACTION	ON	
ENFORCE APPROVED VENDOR	ON	
EXPEDITE ITEM DETAILS	ON	
LEAD TIME	ON	BUSINESS
RESTRICT ITEMS BY PO TYPE	OFF	
STORES LOOKAHEAD REQUIRED DATE		PO
TEMPORARY STOCK STOREROOM	ON	TMP

Description: Stores lookahead due in date is based on the PO Header or PO Item.

Set purchasing options.

For descriptions of the remaining rule keys please refer to the Purchase Order module configuration.

Option, Status, and Value

ACCOUNTS REQUIRED ON PENDING - This rule determines when the system checks for valid account splits on purchasing records. When it is set to ON, changing to Pending Approval status triggers the validation. When it is set to OFF the system validates accounts when the record is changed to Approved status. The default setting is “ON”.

STORES LOOKAHEAD REQUIRED DATE - This rule key determines which date is used as the promised date for items on a purchase order. Set the key to PO to use the promise date on the purchase order header for every item. Set the key to PO ITEM to use the promise date from each individual purchase order line item.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Resend Approval Request

Grants the ability to resend an Approval Request using the Resend Approval Request Action in the Change Order module.

Blanket Contract Module

Fields

Sequence No.: Blanket Contract No.

The record number is comprised of a unique ID (Ex. “B000127”). Purchasing record numbers are typically set to be system generated.

TABLE NAME - SA_BLANKET_CONTRACT - The database table that the sequence number is generated for.

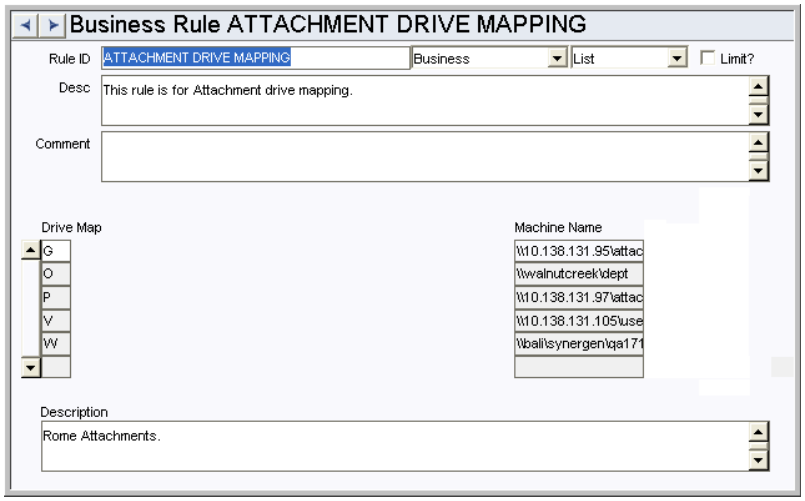
Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Business Rules

Attachment Drive Mapping Rule



Rule ID: ATTACHMENT DRIVE MAPPING · Business · List · ☐ Limit?

Desc: This rule is for Attachment drive mapping.

Comment:

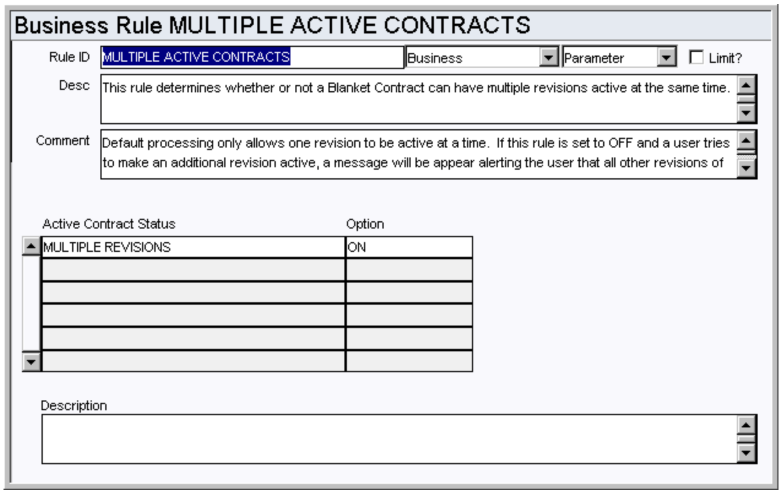
Drive Map	Machine Name
G	\\10.138.131.95\attac
O	\\walnutcreek\dept
P	\\10.138.131.97\attac
V	\\10.138.131.105\use
W	\\bali\synergen\qa171

Description: Rome Attachments.

.Use this rule to map attachment files for the Blanket Contract and Purchase Order modules.

Enter a drive and machine that it should be mapped to in the appropriate columns. Attachments stored on these drives and attached to Blanket Contract or Purchase Order records will be converted to the UNC path and attached to any e-mail sent from the record where the E-Mail Purchase Order action is selected and the Print indicator is checked.

Multiple Active Contracts Rule



Business Rule MULTIPLE ACTIVE CONTRACTS

Rule ID: MULTIPLE ACTIVE CONTRACTS | Business | Parameter | ☐ Limit?

Desc: This rule determines whether or not a Blanket Contract can have multiple revisions active at the same time.

Comment: Default processing only allows one revision to be active at a time. If this rule is set to OFF and a user tries to make an additional revision active, a message will be appear alerting the user that all other revisions of

Active Contract Status	Option
MULTIPLE REVISIONS	ON

Description:

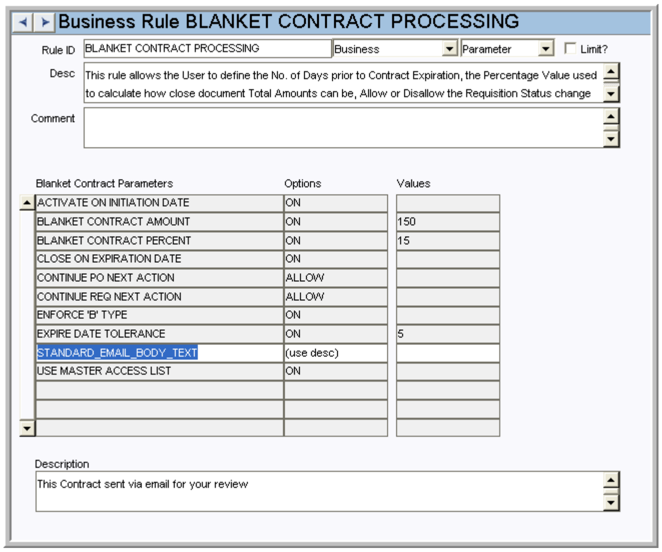
Determine whether or not a Blanket Contract can have multiple revisions active at the same time.

Default processing only allows one revision to be active at a time. If this rule is set to OFF and a user tries to make an additional revision active, a message will be appear alerting the user that all other revisions of the Blanket Contract will be set to created status.

Active Contract Status and Option

Enter ON or OFF in the OPTION column to enable or disable the ability of having a Blanket Contract with more than one active revision. The default is OFF.

Blanket Contract Processing Rule



Business Rule BLANKET CONTRACT PROCESSING

Rule ID: BLANKET CONTRACT PROCESSING | Business | Parameter | ☐ Limit?

Desc: This rule allows the User to define the No. of Days prior to Contract Expiration, the Percentage Value used to calculate how close document Total Amounts can be, Allow or Disallow the Requisition Status change

Comment:

Blanket Contract Parameters	Options	Values
ACTIVATE ON INITIATION DATE	ON	
BLANKET CONTRACT AMOUNT	ON	150
BLANKET CONTRACT PERCENT	ON	15
CLOSE ON EXPIRATION DATE	ON	
CONTINUE PO NEXT ACTION	ALLOW	
CONTINUE REQ NEXT ACTION	ALLOW	
ENFORCE 'B' TYPE	ON	
EXPIRE DATE TOLERANCE	ON	5
STANDARD_EMAIL_BODY_TEXT	(use desc)	
USE MASTER ACCESS LIST	ON	

Description: This Contract sent via email for your review

Define processing options on Blanket Contracts.

Blanket Contract Parameters, Options, and Values

ACTIVATE ON INITIATION DATE - If this option is set to ON, batch processing will Auto-Activate Blanket Contracts when the initiation date has been reached.

BLANKET CONTRACT AMOUNT - If this option is set to On, the User-defined Dollar Amount entered in the Values field represents the Amount prior to reaching the Blanket

Contract Limit Amount that will invoke the allow to continue processing.

BLANKET CONTRACT PERCENT - If this option is set to On, the User-defined Percentage Value entered in the Values field represents the Percentage of a Dollar Value prior to reaching the Blanket Contract Limit Amount that will invoke the allow to continue processing.

CONTINUE PO NEXT ACTION - This determines if the processing of a Purchase Order will be allowed to continue after Warning Message(s) displays that any point of Blanket Contract Validation fails.

CONTINUE REQ. NEXT ACTION - This determines if the processing of a Requisition will be allowed to continue after Warning Message(s) displays that any point of Blanket Contract Validation fails.

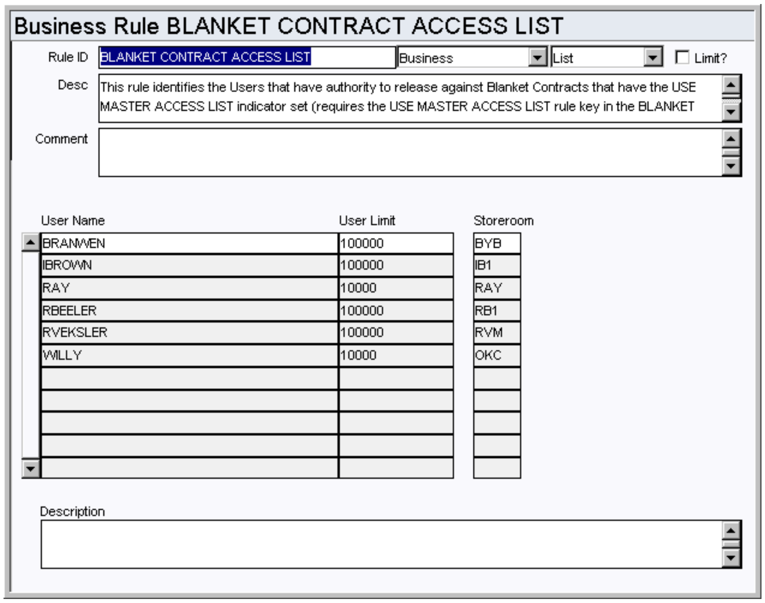
ENFORCE "B" TYPE - If this option is set to ON the Requisition Type in Requisition module will enforce 'B' type when referencing to a Blanket Contract.

EXPIRE DATE TOLERANCE- If this option is set to On, the User-defined Number entered in the Values field will represent the Number of Days prior to reaching the Blanket Contract Expiration Date that will invoke the allow to continue processing.

STANDARED E-MAIL BODY TEXT - Enter the standard text that should appear on emails that are sent to vendors by the system.

USE MASTER ACCESS LIST- If this option set to ON, the Users listed in the BLANKET CONTRACT ACCESS LIST Business Rule will be authorized to Approve and Issue releases against Blanket Contracts that have the USE MASTER ACCESS LIST indicator is checked.

Blanket Contract Access List Rule


Business Rule BLANKET CONTRACT ACCESS LIST

Rule ID: BLANKET CONTRACT ACCESS LIST | Business | List | ☐ Limit?

Desc: This rule identifies the Users that have authority to release against Blanket Contracts that have the USE MASTER ACCESS LIST indicator set (requires the USE MASTER ACCESS LIST rule key in the BLANKET

Comment:

User Name	User Limit	Storeroom
BRANWEN	100000	BYB
IBROWN	100000	IB1
RAY	10000	RAY
RBEELER	100000	RB1
RVEKSLER	100000	RVM
WILLY	10000	OKC

Description:

Define Users authorized to use Blanket Contracts when the User Master Access List indicator is checked.

User Name, User Limit, and Storeroom

The Users listed have authority to release against Blanket Contracts that have the USE MASTER ACCESS LIST indicator set, and when the USE MASTER ACCESS LIST key in the BLANKET CONTRACT PROCESSING rule is ON. The User Limit represents the maximum dollar amount that the user can charge against a contract for a single

Purchase Order. The Storeroom field is for informational purposes only and indicates the storeroom that the user normally works from.

Code Tables

Code Table 35: Blanket Contract Category Codes

Category field - Define categories to classify Contract records. The two system values of DIRECT and INVENTORY cannot be removed or changed; but additional category codes can be defined. This is a system code table.

Copy Record

BLNKTCON - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

CREATE BLANKET CONTRACT REVS

Grants access to the Create Revision action in the Blanket Contract module.

CREATE BLNKET CONTRACT REV HIST

Grants access to the Create Revision with History action in the Blanket Contract module.

DUPLICATE BLANKET TO PO

Grants access to the Copy Record action in the Blanket Contract to PO module.

Batch Processes

Auto Activate Blankets - sdbp_blanket_services.auto_activate;

Sets Blanket Contracts to Active status on the Initiation Date indicated on the Blanket Contracts.

Auto Close Blankets - sdbp_blanket_services.auto_close;

Closes Active Blanket Contracts on the Expiration Date or the Extended Date indicated on the Blanket Contracts.

Reports

S_RPT206 - Blanket Contract Report

Summarizes Blanket Contracts showing stock codes with manufacturers, part numbers, prices, and other important information.

Request for Quotes Module

Fields

Sequence No.: Request for Quotes

The record number is comprised of a unique ID (Ex. “02000033”). Purchasing record numbers are typically set to be system generated.

TABLE NAME - SA_QUOTE - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

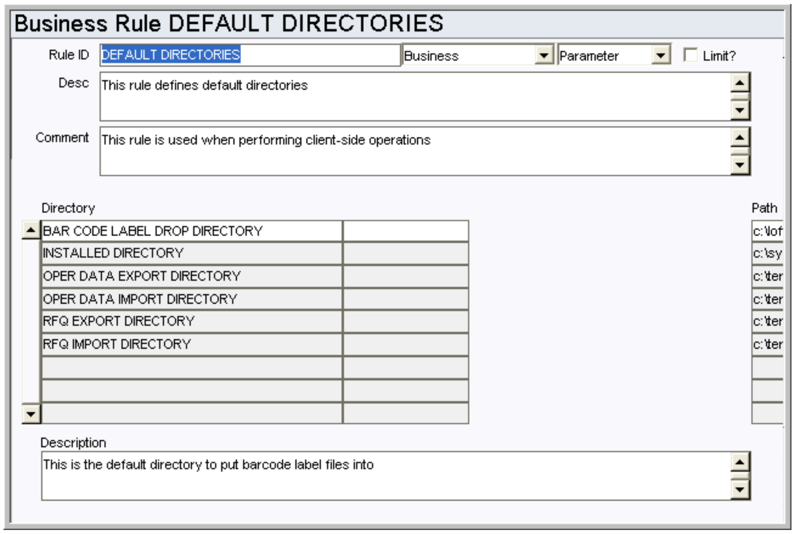
Please refer to Sequence Numbers Module for more information and examples.

Next Approver Field

Designate approvers for Requests for Quotes in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Business Rules

Default Directories Rule



Business Rule DEFAULT DIRECTORIES

Rule ID: DEFAULT DIRECTORIES | Business | Parameter | ☐ Limit?

Desc: This rule defines default directories

Comment: This rule is used when performing client-side operations

Directory	Path
BAR CODE LABEL DROP DIRECTORY	c:\of
INSTALLED DIRECTORY	c:\sy
OPER DATA EXPORT DIRECTORY	c:\ter
OPER DATA IMPORT DIRECTORY	c:\ter
RFQ EXPORT DIRECTORY	c:\ter
RFQ IMPORT DIRECTORY	c:\ter

Description: This is the default directory to put barcode label files into

The Default Directories rule defines default locations for files outside of the Oracle Utilities Work and Asset Management database and is used for saving or calling files from the client computer. Individual users can establish settings in their individual User Profile record in the Administration subsystem that will supersede these business rule settings.

The Default Directories rule should not be confused with the similar Default File Locations rule, which is used to define specific file names and the paths leading to them.

Directory

BAR CODE LABEL DROP DIRECTORY - default directory to put bar code label files into.

INSTALLED DIRECTORY - directory where the application files are located.

OPER DATA EXPORT DIRECTORY - default directory for exporting Operational Data files.

OPER DATA IMPORT DIRECTORY - default directory for importing Operational Data files.

RFQ EXPORT DIRECTORY - default directory for exporting RFQ files.

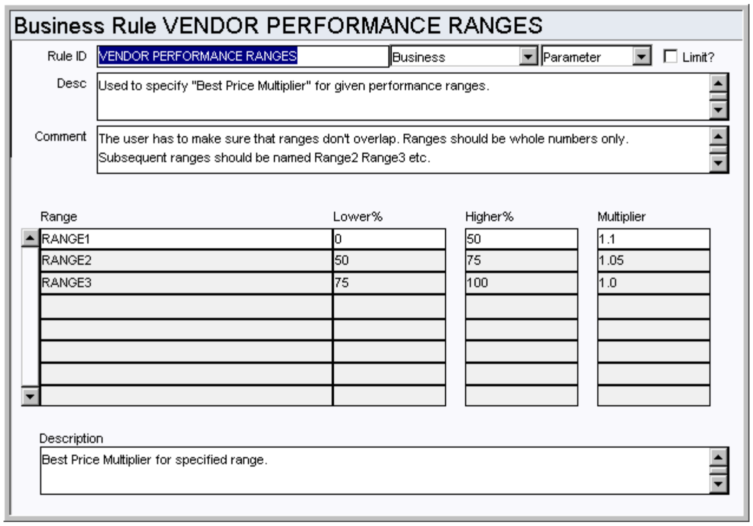
RFQ IMPORT DIRECTORY - default directory for importing RFQ files.\

COMPONENT UPLOAD DIRECTORY - directory where files are stored when they are uploaded to support receiving multiple trackable components.

Path

This is the hard drive storage location for the corresponding file.

Vendor Performance Ranges Rule



Business Rule VENDOR PERFORMANCE RANGES

Rule ID: VENDOR PERFORMANCE RANGES | Business | Parameter | ☐ Limit?

Desc: Used to specify "Best Price Multiplier" for given performance ranges.

Comment: The user has to make sure that ranges don't overlap. Ranges should be whole numbers only.
Subsequent ranges should be named Range2 Range3 etc.

Range	Lower%	Higher%	Multiplier
RANGE1	0	50	1.1
RANGE2	50	75	1.05
RANGE3	75	100	1.0

Description: Best Price Multiplier for specified range.

The Vendor Performance Ranges Rule is used to specify the “Best Price Multiplier” for given performance ranges. You can establish as many ranges as you want, but you must be sure that the ranges do not overlap. Ranges should be whole numbers only.

Range

Ranges should be named Range1, Range2, Range3, up to the total number of ranges that you want to define.

Lower %

Enter the lower percentage (>/=) value for the Total Vendor Performance for the range. Do not use decimal values.

Higher %

Enter the higher (<) percentage value for the Total Vendor Performance for the range. Do not use decimal values. Since this is a ‘less than’ value, you must use 101% to include vendor performance rating of 100% within the range.

Multiplier

Enter the multiplier value for the range. You can define multiplier values to increase bids from vendors with lower vendor performance ranges. This concept is discussed in more depth in the User Guide section titled Using Ratings in the RFQ Process.

RangeLower %Higher %Multiplier

Range1911011.0

Range285901.05

Range30841.1

Note: This rule is also configured under the Vendor module, however it affects the analysis of the RFQ module.

Code Tables

Code Table 17: Issue Methods (Vendor (Detail) View)

Issue Method field - Define codes to identify ways in which Requests for Quotes can be issued to vendors. Some examples of data are: Priority Mail, Fax, US Mail, Spreadsheet File.

Copy Record

RFQ - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Add Vendor After RFQ Issued

Grants the ability to add vendors to an RFQ after the record has been set to Issued status.

Award RFQ

Grants the ability to award Requests for Quotes to vendors.

Export RFQ

Grants the ability to export Requests for Quotes to another type of file (usually a spreadsheet).

Import RFQ

Grants the ability to import Requests for Quotes from another type of file (usually a spreadsheet).

Issue RFQ

Grants the ability to issue Requests for Quotes to vendors.

Reports

S_RPT093 - Request for Quotes Report

Lists RFQs that are ready to be sent to Vendors.

Invoicing Module

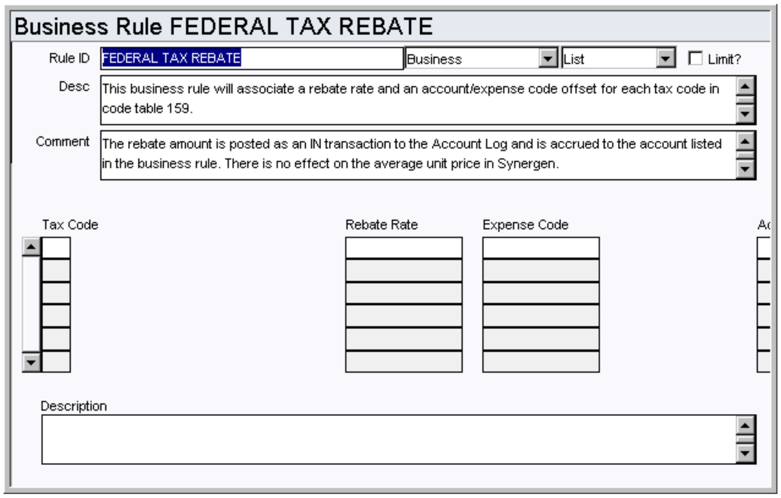
Fields

Approval Route Field

Designate approvers for work requests in the Approval Limit module under Approvals and Routes in the Administration subsystem.

Business Rules

Federal Tax Rebate Rule



Business Rule FEDERAL TAX REBATE

Rule ID: FEDERAL TAX REBATE

Business

List

☐ Limit?

Desc: This business rule will associate a rebate rate and an account/expense code offset for each tax code in code table 159.

Comment: The rebate amount is posted as an IN transaction to the Account Log and is accrued to the account listed in the business rule. There is no effect on the average unit price in Synergen.

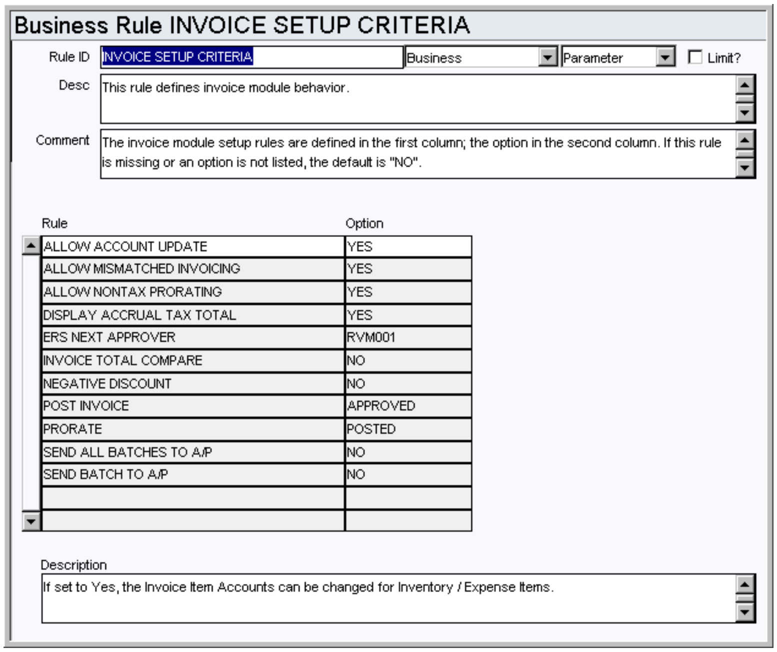
Associate rebate rates and account/expense code offsets for each tax code in Code Table 159. The functionality used to prorate associated costs in invoicing uses this rule. If the check box on the Invoice Prorate view of the Invoicing module is not selected, the account/expense code listed in this rule is used to accrue the taxes. The rebate rate reflects how much of the tax to accrue, i.e., 100 = all taxes, etc.

This rule can also be used to pass accruals to defined interfaces.

Tax Code, Rebate Rate, Expense Codes, and Account Number

Enter the Tax Code in the Tax Code field, then enter the Rebate Rate, Expense Code, and Account number that you want to automatically associate with that Tax Code. The rebate amount is posted as an IN transaction to the Account Log and is accrued to the account specified.

Invoice Setup Criteria Rule



Business Rule INVOICE SETUP CRITERIA

Rule ID: INVOICE SETUP CRITERIA | Business | Parameter | ☐ Limit?

Desc: This rule defines invoice module behavior.

Comment: The invoice module setup rules are defined in the first column; the option in the second column. If this rule is missing or an option is not listed, the default is "NO".

Rule	Option
ALLOW ACCOUNT UPDATE	YES
ALLOW MISMATCHED INVOICING	YES
ALLOW NONTAX PRORATING	YES
DISPLAY ACCRUAL TAX TOTAL	YES
ERS NEXT APPROVER	RVM001
INVOICE TOTAL COMPARE	NO
NEGATIVE DISCOUNT	NO
POST INVOICE	APPROVED
PRORATE	POSTED
SEND ALL BATCHES TO A/P	NO
SEND BATCH TO A/P	NO

Description: If set to Yes, the Invoice Item Accounts can be changed for Inventory / Expense Items.

Define how invoice processing will be handled. If this rule is missing or an option is not listed, the default is “NO”.

Rule and Option

ALLOW ACCOUNT UPDATE - If this rule key is set to YES users can override and change the Account for Inventory and Expense type stock codes on Invoice Line Items. User's responsibility profile must also contain the function, INVOICE ACCOUNT OVERRIDE.

ALLOW MISMATCHED INVOICING - If this option is set to YES it will allow an Invoice that does not match the Purchase Order to be recorded in the system. The system automatically puts such records into Pending Resolution status. After the mismatch has been resolved, batch processing changes the status to Approved.

ALLOW MULTIPLE POS - When this option is set to ON, you can record more than one purchase order per invoice. The system provides a Change PO button on the Matching to PO views and a Start Again option on the Quick Invoice Wizard where items from additional purchase order(s) can be recorded.

ALLOW NONTAX PRORATING - This option defines whether or not prorating to non-taxed line items is allowed or disallowed.

AVERAGE UNIT PRICE CALCULATION - Defines how the system calculates Average Unit Price (AUP) for a storeroom when the difference between the total amount of an invoiced item is greater than the total amount on the original purchase order item. If the rule is set to OFF, the entire difference is applied evenly among the Storeroom Item On Hand Quantity. If the rule is set to ON, the difference per item is applied.

For example: Assume a brand new storeroom item. PO Item ordered and received for 10 items at $1 each. Stock Checkout of 8 items, thus On Hand Quantity is 2. Then invoiced at $2 for all 10 items.

If the rule is set to OFF, the AUP will be $6.00 ($1 + Difference divided by On Hand Quantity).

If the rule is set to ON, the AUP will be $2.00. ($1 + difference per item).

COPY PO ATTACHMENTS - When this option is set to YES, all existing attachments associated to the Purchase Order header are copied to the new Invoice record. Also any attachments associated to the Purchase Order line item are copied to the new invoice during the Matching to PO process. The default setting is NO.

DISPLAY ACCRUAL TAX TOTAL - Set this option to YES to display the accrued tax total on the invoice header.

ERS NEXT APPROVER - Identifies the next approver for Auto Invoices that have received more items than were ordered.

INVOICE TOTAL COMPARE - Set this option to 'YES' to display a warning when the manual invoice total field and the invoice total amount fields do not match. The warning message be displays when the user attempts to change status to Pending Approval.

NEGATIVE DISCOUNT - Set this option to YES to allow a negative number to be entered in the Discount Rate field on the invoice header. Do this if you want to markup (increase) the item total by the percentage entered.

OVERRIDE DISCOUNT AMOUNT - If this option is set to YES, the Invoice Discount Amount can be manually updated with a new value when the Invoice has an Item Total Amount. When the Invoice Discount Amount is manually updated the Invoice Discount Rate is recalculated appropriately. When the option is set to NO, the Invoice Discount Amount is calculated based on the Discount Rate and cannot be updated manually.

POST INVOICE - This option determines when invoices are posted throughout the system.

If Post Invoice is set to Approved (Default), the system posts invoices when invoices are in Approved status.

If Post Invoice is set to Sent to A/P, the system posts invoices when the invoice status is set to Approved and the Sent to A/P indicator is set to 'Y'.

If Post Issue is set to Paid, the system posts invoices when the invoice status is set to Approved and the Paid Indicator is set to 'Y'.

PRORATE - This option determines when the prorating procedure is executed.

If this option is set to APPROVED, the prorate procedure will be executed when the Invoice status is set to Approved. The user will not be allowed to set the status of the Invoice record from APPROVED back to CREATED.

If this option is set to POSTED, the prorate procedure will be called during batch processing when the Invoice is set to Posted. Status changes from APPROVED back to CREATED are allowed with this setting.

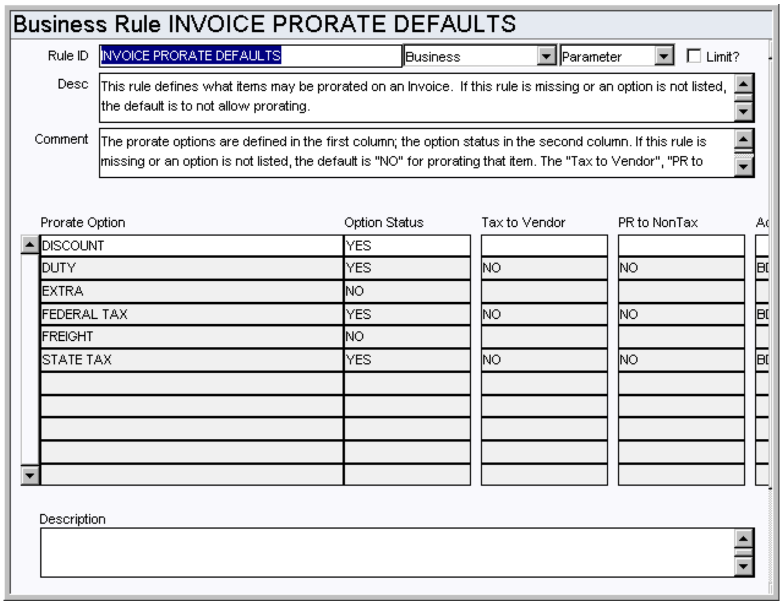
SEND ALL BATCHES TO A/P - Set this option to YES to display the Send All Batches to A/P action in the Invoice Batch module.

SEND BATCH TO A/P - Set this option to YES to display the Send Batch to A/P action in the Invoice Batch module.

SHOW ALL PO LINES IN MATCHING - This option only affects invoice processing when the ALLOW MISMATCHED INVOICING rule key is set to NO. If SHOW ALL PO LINES IN MATCHING is set to YES then all purchase order line items with an "M" type are displayed in the Matching to PO views even if they have been previously matched. This rule option has no impact on "S" or "X" type line items.

If the ALLOW MISMATCHED INVOICING rule key is set to YES then all PO items are displayed in the Matching to PO views even if they have been previously matched regardless of the setting on the SHOW ALL PO LINES IN MATCHING rule key.

Invoice Prorate Defaults Rule



Business Rule INVOICE PRORATE DEFAULTS

Rule ID: INVOICE PRORATE DEFAULTS | Business | Parameter | ☐ Limit?

Desc: This rule defines what items may be prorated on an Invoice. If this rule is missing or an option is not listed, the default is to not allow prorating.

Comment: The prorate options are defined in the first column; the option status in the second column. If this rule is missing or an option is not listed, the default is "NO" for prorating that item. The "Tax to Vendor", "PR to

Prorate Option	Option Status	Tax to Vendor	PR to NonTax	Ac
DISCOUNT	YES			
DUTY	YES	NO	NO	B
EXTRA	NO			
FEDERAL TAX	YES	NO	NO	B
FREIGHT	NO			
STATE TAX	YES	NO	NO	B

Description:

Define which costs can be prorated on an Invoice. This rule also controls tax accruals, providing you the ability to pay or not pay taxes to the vendor.

If this rule is missing or an option is not listed, the default is to NOT allow prorating.

The types of expenses that can be entered include DISCOUNT, DUTY TAX, EXTRA COSTS, FEDERAL TAX, FREIGHT CHARGES, and STATE TAX. Enter YES or NO in the Option Status column to allow or disallow the option to prorate the type of charge on an Invoice.

Tax to Vendor

Indicates whether taxes are handled. If YES is entered in this column then taxes are paid to the vendor. If NO is entered in this column, taxes are not paid to the vendor but are accrued, and posted to the Account Log. If SPLIT is entered into this column, then taxes are split between the vendor and the accrual account. If this column is blank, the default is NO.

PR to NonTax

Indicates whether or not taxes are prorated to nontaxed line items. (YES/NO)

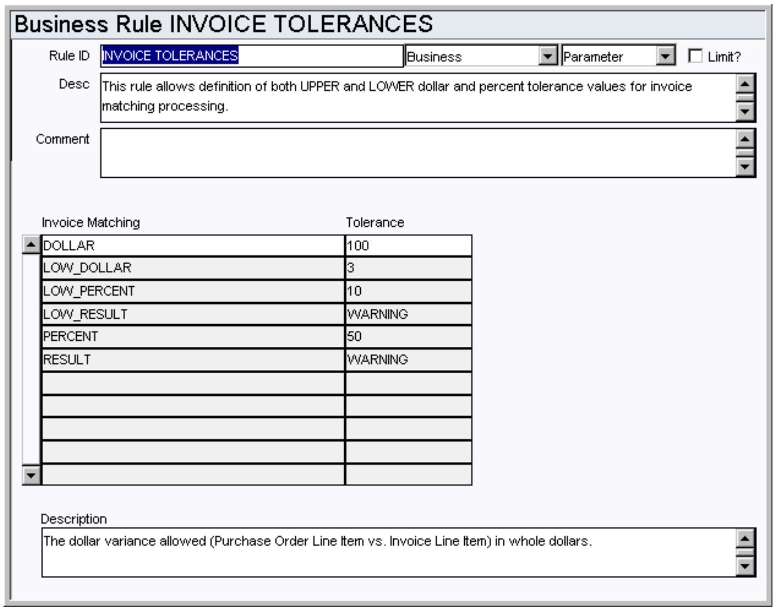
Accr Account

Indicates the account to be used for tax accrual amounts. (YES/NO)

Accr Expense

Indicates the Expense Code to be used for tax accrual amounts. (YES/NO)

Invoice Tolerances Rule



Business Rule INVOICE TOLERANCES

Rule ID: INVOICE TOLERANCES | Business | Parameter | ☐ Limit?

Desc: This rule allows definition of both UPPER and LOWER dollar and percent tolerance values for invoice matching processing.

Comment:

Invoice Matching	Tolerance
DOLLAR	100
LOW_DOLLAR	3
LOW_PERCENT	10
LOW_RESULT	WARNING
PERCENT	50
RESULT	WARNING

Description: The dollar variance allowed (Purchase Order Line Item vs. Invoice Line Item) in whole dollars.

Set both dollar and percent tolerance values for invoice matching processing. Also determine whether the system displays a warning, or prevents the user from continuing if tolerance values are surpassed.

Invoice Matching and Tolerance

DOLLAR - Enter the maximum allowed whole dollar difference between the Purchase Order Line Item value and the Invoice Line Item value.

LOW DOLLAR - Enter the minimum allowed whole dollar difference between the Purchase Order Line Item value and the Invoice Line Item value.

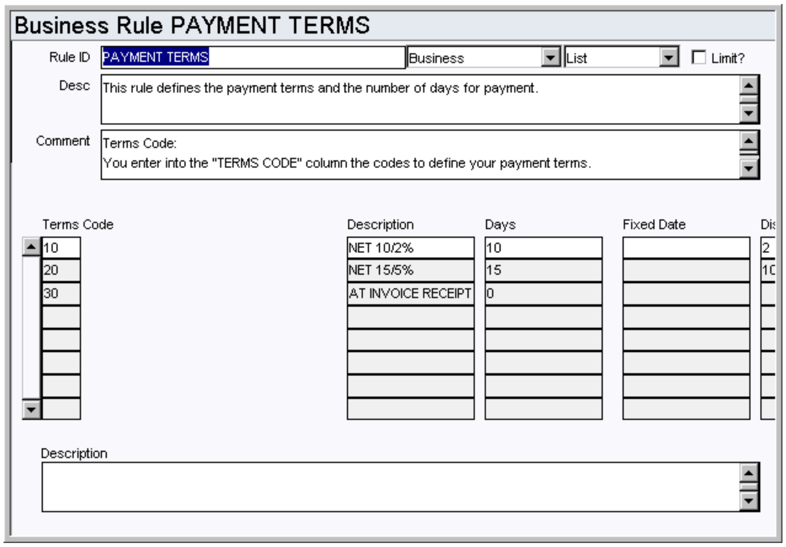
PERCENT - Enter the maximum allowed whole percent difference between the Purchase Order Line Item value and the Invoice Line Item value.

LOW PERCENT - Enter the minimum allowed whole percent difference between the Purchase Order Line Item value and the Invoice Line Item value.

RESULT - Enter how the system should respond when the value entered is more than allowed. Enter WARNING to display a warning message, or STOP to prevent the user from continuing.

LOW RESULT - Enter how the system should respond when the value entered is less than allowed. Enter WARNING to display a warning message, or STOP to prevent the user from continuing.

Payment Terms Rule



Business Rule PAYMENT TERMS

Rule ID: PAYMENT TERMS | Business | List | ☐ Limit?

Desc: This rule defines the payment terms and the number of days for payment.

Comment: Terms Code:
You enter into the "TERMS CODE" column the codes to define your payment terms.

Terms Code	Description	Days	Fixed Date	Di
10	NET 10/2%	10		2
20	NET 15/5%	15		1
30	AT INVOICE RECEIPT	0		

Description:

Define payment terms and the number of days before payment is due per term.

Terms Code and Description

Enter the codes to define your payment terms, and define the code in the Description column.

Days

Enter the number of days that the system should use to calculate the invoice due date based on the vendor date entered on the invoice.

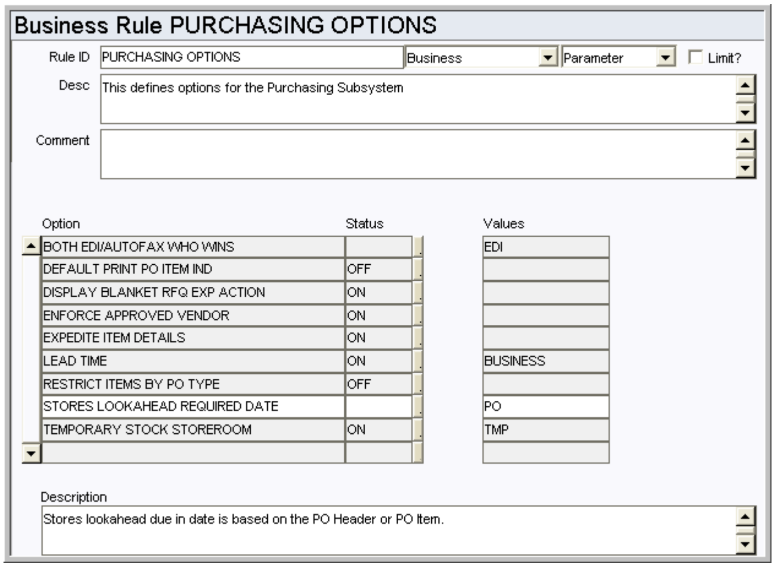
Fixed Date

If a vendor has arranged for an invoice due date to be the same each month, enter the day into the this column. For example, if 20 is entered in this column, the due date would be the 20th of every month.

Discount %

Enter any discount that might be given for using a certain payment term.

Purchasing Options Rule



Rule ID: PURCHASING OPTIONS | Business | Parameter | ☐ Limit?

Desc: This defines options for the Purchasing Subsystem

Comment:

Option	Status	Values
BOTH EDI/AUTOFAX WHO WINS		EDI
DEFAULT PRINT PO ITEM IND	OFF	
DISPLAY BLANKET RFQ EXP ACTION	ON	
ENFORCE APPROVED VENDOR	ON	
EXPEDITE ITEM DETAILS	ON	
LEAD TIME	ON	BUSINESS
RESTRICT ITEMS BY PO TYPE	OFF	
STORES LOOKAHEAD REQUIRED DATE		PO
TEMPORARY STOCK STOREROOM	ON	TMP

Description: Stores lookahead due in date is based on the PO Header or PO Item.

Determine whether or not the system validates for account splits when the record is set to pending approval status.

For descriptions of the remaining rule keys please refer to the Purchase Order module configuration.

Option, Status, and Value

ACCOUNTS REQUIRED ON PENDING - This rule determines when the system checks for valid account splits on purchasing records. When it is set to ON, changing to Pending Approval status triggers the validation. When it is set to OFF the system validates accounts when the record is changed to Approved status. The default setting is “ON”.

Custom LOV Notes for the Invoicing Module

When creating custom LOVs that function with the Pay to Vendor field on the Invoice header you need to ensure you are using the correct record group which were created to separate vendor Lists of Values:

1. PAY_TO_VENDOR_CODE_HDR should be used when function INVOICE PAY TO VENDORS is OFF in the Responsibility Module.
2. ALL_PAY_TO_VENDORS should be used when function INVOICE PAY TO VENDORS is ON in the Responsibility Module.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Display Accrual Tax Total

Grants the ability to see the accrued tax total on Invoice records.

Invoice Account Override

Grants the ability to change Invoice Line Item account numbers that were retrieved from a Purchase Order.

Invoice - Override Discrepant

Grants the ability to change Invoice record status from Pending Resolution to Created status when a discrepancy still exists.

Invoice - Resolve Discrepant

Grants the ability to change Invoice record status from Pending Resolution to Created status after the discrepancy has been resolved (and before batch processing would make a similar status change).

Invoice Pay to Vendors

Grants the ability to select a different invoice pay to vendor than is indicated on the original Invoice.

Code Tables

Code Table 159: Federal Tax Codes (Length = 1)

Federal field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 160: State Tax Codes (Length = 1)

State field - The code can only be one character and the Description should contain the percentage rate in the first six characters of the field.

Code Table 161: Duty Codes (Length = 1)

Duty field - The code can only be one character long and the Description should contain the percentage rate in the first six characters of the field.

Code Table 157: Invoice Prorate Options

Prorate Options column - Define values for the Prorate Options field. Oracle Utilities Work and Asset Management pre-loads the standard selections: DISCOUNT, DUTY, EXTRA, FEDERAL TAX, FREIGHT, STATE TAX, but you can modify or add to this list.

Batch Processes

Invoice Resolution - sdbp_invoice-resolution;

Uses the INVOICE SETUP CRITERIA Business Rule for determining whether mismatched invoice processing is allowed, and tries to resolve mismatched invoices to PO receiving.

Cost Invoice - sdbp_cost_invoice.cost_invoice;

Processes costs for purchase Invoices, selecting approved Invoices and posting costs throughout the system as required. Once an Invoice is successfully processed, it is marked as posted.

Automatic Invoicing - sdbp_ers_invoicing;

Generates invoices based on records that are set for automatic invoicing.

Reports

S_RPT064 - Invoice Variance Report

Provides a summary of Invoices that vary from the Purchase Order.

S_RPT024 - Purchase Order Accruals (Unpaid Receipts) Report

Lists Purchase Orders with items that are not fully invoiced.

Invoice Batch Module

Fields

Sequence No.: Batch ID

The record number is comprised of a unique ID (Ex. “0000000000001”). Invoice Batch record numbers are typically set to be system generated.

TABLE NAME - SA_INVOICE_BATCH- The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 243: Process Level

Process Level Field - Establish codes that will define process groupings for your invoice batch procedures.

Warranty Claim Module

Fields

Sequence No.: Warranty No.

The record number is comprised of a unique ID (Ex. “0200070”). Warranty claim numbers are usually system generated.

> **TABLE NAME** - SA_MFR_WARRANTY_CLAIM - The database table that the sequence number is generated for.
>
> **Sequence Number, Prefix, and Length -** If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.
>
> **System** - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

CREATE WARRANTY CLAIM

Grants access to the action that creates a claim against a warranty in the Warranty module.

Batch Processes

Warranty Expiration Alerts - sdbp_process_warranty_alerts;

Sends an alert to the person indicated on the Warranty when the warranty expires.

Warranty Module

Fields

Sequence No.: Warranty No.

The record number is comprised of a unique ID (Ex. “0200070”). Warranty numbers must be system generated. Manual creation of these record numbers could result in critical system errors when WOs are created from other records or in batch procedures.

TABLE NAME - SA_MFR_WARRANTY - The database table that the sequence number is generated for.

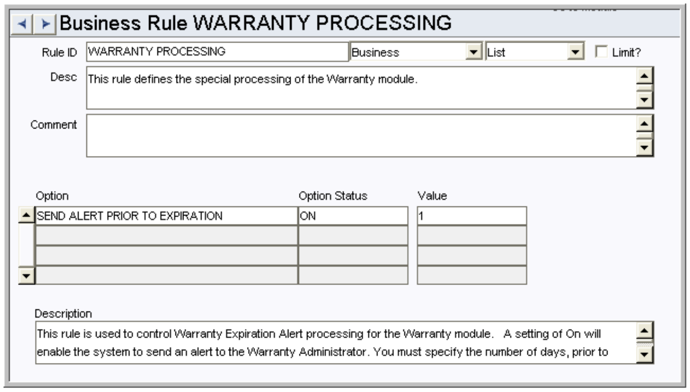
Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Business Rules

Warranty Processing Rule



Business Rule WARRANTY PROCESSING

Rule ID: WARRANTY PROCESSING | Business | List | ☐ Limit?

Desc: This rule defines the special processing of the Warranty module.

Comment:

Option	Option Status	Value
SEND ALERT PRIOR TO EXPIRATION	ON	1

Description: This rule is used to control Warranty Expiration Alert processing for the Warranty module.   A setting of On will enable the system to send an alert to the Warranty Administrator. You must specify the number of days, prior to

This rule controls warranty processing throughout the system.

Send Alert Prior to Expiration

Set this option to ON to have the system send an alert to the warranty administrator when the warranty is nearing expiration. You must specify the number of days prior to expiration that the alert is sent. Setting the option to OFF disables alerts.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

CREATE WARRANTY CLAIM
Grants access to the action that creates a claim against a warranty in the Warranty module.

Copy Record

WARRANTY - COPY RECORD
Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Batch Processes

Warranty Expiration Alerts - sdbp_process_warranty_alerts;
Sends an alert to the person indicated on the Warranty when the warranty expires.

Cost Adjustment Module

Fields

Sequence No.: Adjustment ID

The record number is comprised of a unique ID (Ex. “00024”). Cost Adjustment record numbers are typically set to be system generated.

TABLE NAME - SA_ADJUSTMENT - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

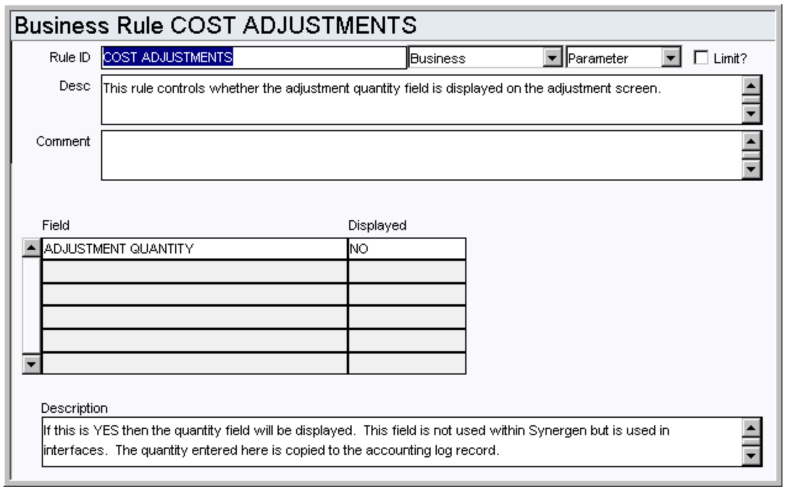
Please refer to Sequence Numbers Module for more information and examples.

Next Approver Field

Designate approvers for Cost Adjustments in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Business Rules

Cost Adjustments Rule



Business Rule COST ADJUSTMENTS

Rule ID: COST ADJUSTMENTS — Business — Parameter — ☐ Limit?

Desc: This rule controls whether the adjustment quantity field is displayed on the adjustment screen.

Comment:

Field	Displayed
ADJUSTMENT QUANTITY	NO

Description: If this is YES then the quantity field will be displayed. This field is not used within Synergen but is used in interfaces. The quantity entered here is copied to the accounting log record.

The Cost Adjustments business rule controls whether the adjustment quantity field is displayed on the adjustment screen for use with interfaces.

Field and Displayed

If Displayed is set to YES then the Adjustment Quantity field will be displayed on the adjustment screen. This field is not used within Oracle Utilities Work and Asset Management but is used in interfaces. The quantity entered here is copied to the accounting log record.

Field and Displayed

If Displayed is set to YES, then the Adjustment Quantity field will appear on the cost adjustment screen. This field is not used within the system but can be used in the interfaces. The quantity amount will be populated on the accounting log.

Batch Processes

Asset Cost Allocation - sdbp_cost_asset;

Allocates costs to assets indicated on the Asset list in the Work Order Task module by creating cost adjustment records and posting accordingly.

Cost Adjustment for PM Route - sdbp_cost_route.cost_route;

Generates and posts cost adjustments to remove charges from the work order task account and distribute them among the PM Route's assets. Labor and material costs related to accomplishing the Scheduled PM Route are charged against the work order's task and then distributed amongst the assets that were finished on the PM Route.

Cost Adjustment - sdbp_cost_adjustment;

Processes adjustments costs that have not yet been posted.

Purchasing Log Module

The Purchasing Log module displays the log of Purchasing events.

Code Tables

Code Table 121: Purchasing Event Types

Event Type column - Define event types. System defined types are: EMAIL, PRINT, and STATUS.

Blanket Contract Log Module

The Blanket Contract Log module displays the log of Purchasing events.

Service Contract Module

Fields

Sequence No.: Contract

The record number is comprised of a unique ID (Ex. “0200002”). Service Contract record numbers are typically set to be system generated.

TABLE NAME - SA_SERVICE_CONTRACT- The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 35: Contract Category Codes

Category field - Define categories to classify Contract records. The two system values of DIRECT and INVENTORY cannot be removed or changed; but additional category codes can be defined. This is a system code table.

Copy Record

SERVCONTR - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reports

S_RPT087 - Service Contract Accrued Cost Report

Provides a summary of accrued cost (invoiced) charges for Service Contracts.

S_RPT085 - Service Contract Details Report

Provides a detailed summary by rate type of estimated, committed, actual, and invoiced time charges (rates and hours) for Service Contracts.

S_RPT086 - Service Contract Summary Report

Provides a summary of estimated, committed, actual, and invoiced time charges for Contracts.

Service Contract Invoice Module

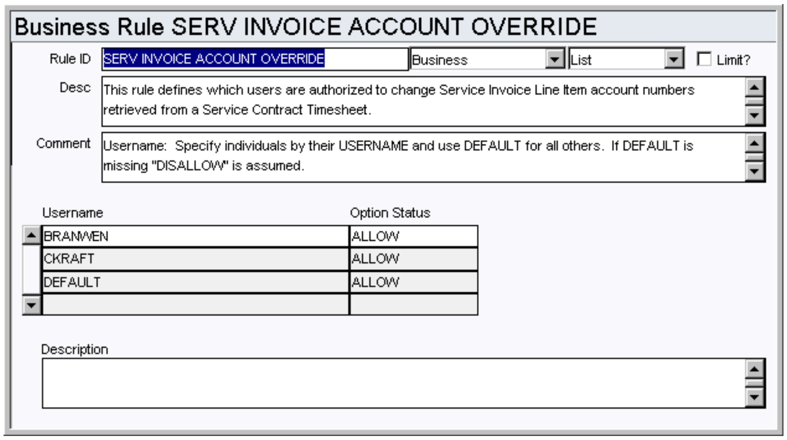
Code Tables

Code Table 700: Job Reference Codes

Job Ref. field - Define codes to provide unique identifiers for service timesheet records.

Business Rules

Serv Invoice Account Override Rule



Business Rule SERV INVOICE ACCOUNT OVERRIDE

Rule ID: SERV INVOICE ACCOUNT OVERRIDE | Business | List | ☐ Limit?

Desc: This rule defines which users are authorized to change Service Invoice Line Item account numbers retrieved from a Service Contract Timesheet.

Comment: Username: Specify individuals by their USERNAME and use DEFAULT for all others. If DEFAULT is missing "DISALLOW" is assumed.

Username	Option Status
BRANWEN	ALLOW
CKRAFT	ALLOW
DEFAULT	ALLOW

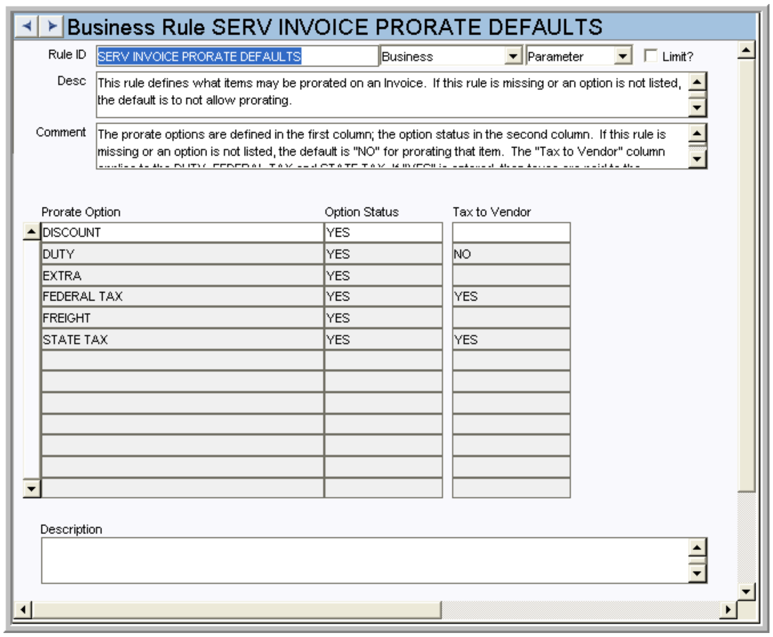
Description:

Define the users authorized to change Service Invoice Line Item account numbers retrieved from a Service Contract Timesheet.

Username and Option Status

For a user to override the account number on a Service Invoice, the user's username must be listed in the Username column with ALLOW in the Option Status column. If DEFAULT is entered in the Username column and the Option Status is ALLOW, then all users not listed will be allowed to change the Service Invoice Line Item account number. Alternately you can enter DISALLOW for Default and all users not listed will not be able to change the account number.

Serv Invoice Prorate Defaults Rule



Rule ID: SERV INVOICE PRORATE DEFAULTS | Business | Parameter | ☐ Limit?

Desc: This rule defines what items may be prorated on an Invoice. If this rule is missing or an option is not listed, the default is to not allow prorating.

Comment: The prorate options are defined in the first column; the option status in the second column. If this rule is missing or an option is not listed, the default is "NO" for prorating that item. The "Tax to Vendor" column

Prorate Option	Option Status	Tax to Vendor
DISCOUNT	YES	
DUTY	YES	NO
EXTRA	YES	
FEDERAL TAX	YES	YES
FREIGHT	YES	
STATE TAX	YES	YES

Description:

Define which items can be prorated on an Invoice. If this rule is missing or an option is not listed, the default is to not allow prorating. This rule also controls tax accruals, providing you the ability to pay or not pay taxes to the vendor.

If this rule is missing or an option is not listed, the default is “NO” for prorating that item. The Tax to Vendor column applies to the DUTY, FEDERAL TAX and STATE TAX. If “YES” is entered, then taxes are paid to the vendor.

Prorate Option and Status

DISCOUNT - Enter into the Option Status column YES or NO to allow or disallow the option to prorate the DISCOUNT on a Service Invoice.

EXTRA - Enter into the Option Status column YES or NO to allow or disallow the option to prorate the EXTRA costs associated with a Service Invoice.

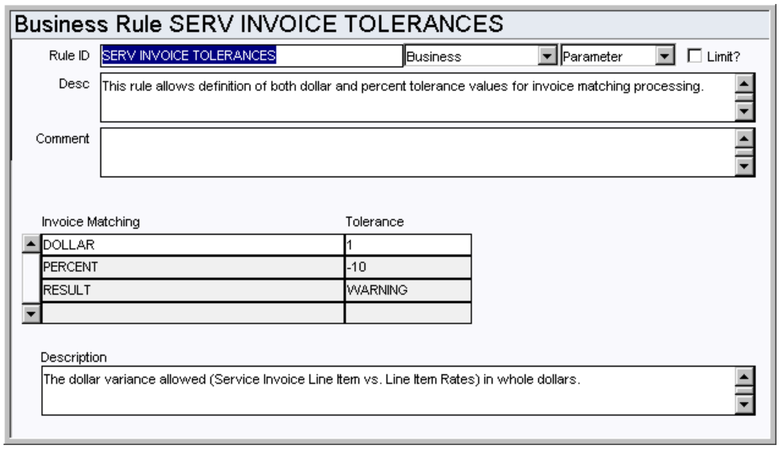
FEDERAL TAX - Enter into the Option Status column YES or NO to allow or disallow the option to prorate the FEDERAL TAX on a Service Invoice.

FREIGHT - Enter into the Option Status column YES or NO to allow or disallow the option to prorate the FREIGHT on a Service Invoice.

STATE TAX - Enter into the Option Status column YES or NO to allow or disallow the option to prorate the STATE TAX on a Service Invoice.

TAX TO VENDOR- This column applies to the DUTY, FEDERAL TAX, and STATE TAX. If YES is entered in this column then taxes are paid to the vendor. If NO is entered in this column, taxes are not paid to the vendor. If this column is blank, the Default is NO.

Serv Invoice Tolerances Rule



Business Rule SERV INVOICE TOLERANCES

Rule ID: SERV INVOICE TOLERANCES | Business | Parameter | ☐ Limit?

Desc: This rule allows definition of both dollar and percent tolerance values for invoice matching processing.

Comment:

Invoice Matching	Tolerance
DOLLAR	1
PERCENT	-10
RESULT	WARNING

Description: The dollar variance allowed (Service Invoice Line Item vs. Line Item Rates) in whole dollars.

Define dollar and percent tolerance values for invoice matching processing.

Invoice Matching and Tolerance

DOLLAR - Enter the maximum (whole) dollar difference between the Service Invoice Line Item value and the Line Item Rate value that is allowed in the Tolerance column.

PERCENT - Enter the maximum (whole) percent difference between the Service Invoice Line Item value and the Line Item Rate value that is allowed in the Tolerance column.

RESULT - Enter either WARNING or STOP into the Tolerance column to either issue a warning message (and let the user continue) or to prevent the user from continuing when either tolerance is exceeded.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Serv Invoice Account Override

Grants the ability to change Service Invoice Line Item account numbers retrieved from a PO.

Service Invoice Export Wizard

Grants access to the action that allows users to export a file showing posted Service Invoice records and associated Timesheet details based on the selection criteria entered.

Batch Processes

Cost Service Invoice - sdbp_cost_service_invoice.cost_service_invoice;

Processes costs for service contract Invoices, selecting approved Invoices and posting costs throughout the system as required.

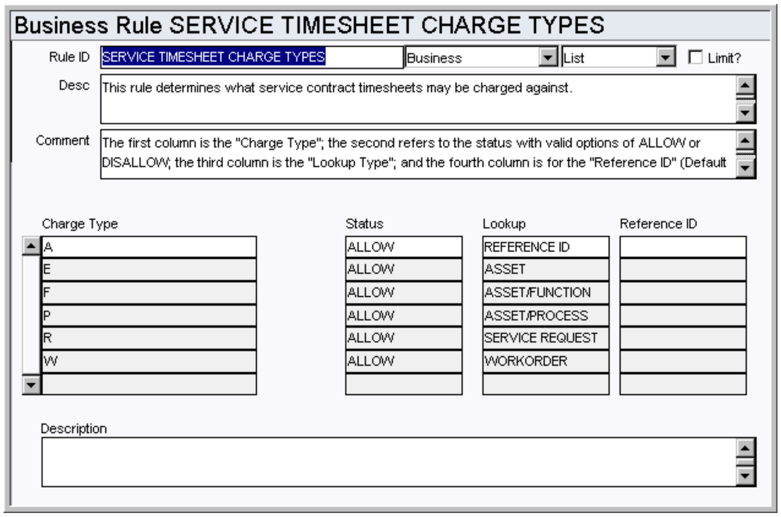
Accumulate Posted Service Timesheets - sdbp_process_service_timesheet.accumulate_posted;

Generates Service Contract Invoice records and associated Invoice Line Items for each Service Contract Timesheet in posted status with the Auto Pay indicator checked.

Service Contract Timesheets Module

Business Rules

Service Timesheet Charge Types Rule



Business Rule SERVICE TIMESHEET CHARGE TYPES

Rule ID: SERVICE TIMESHEET CHARGE TYPES — Business — List — ☐ Limit?

Desc: This rule determines what service contract timesheets may be charged against.

Comment: The first column is the "Charge Type"; the second refers to the status with valid options of ALLOW or DISALLOW; the third column is the "Lookup Type"; and the fourth column is for the "Reference ID" (Default

Charge Type	Status	Lookup	Reference ID
A	ALLOW	REFERENCE ID	
E	ALLOW	ASSET	
F	ALLOW	ASSET/FUNCTION	
P	ALLOW	ASSET/PROCESS	
R	ALLOW	SERVICE REQUEST	
W	ALLOW	WORKORDER	

Description:

Determine the charge types for Service Contract Timesheets.

Charge Type

Create charge type codes in this column. These values should be a single, unique character (such as “A” for “Account” or “W” for “Work Order”).

Note: Charges based on an account number use the value in the Reference ID field as the Charge Number. Any account number you wish to directly charge time against must have a Reference ID. For more information regarding Reference ID's, please refer to the Account section of the Resource Users Guide.

Status

Enter ALLOW in this column to indicate that the CHARGE TYPE can be entered. Enter DISALLOW to indicate that the CHARGE TYPE cannot be entered.

Lookup

This column determines which database table is used to validate the associated Account Number (when labor charges are entered).

Reference ID

This column contains an optional default Account Number. If you enter a value into this column, then when a user charges time against this CHARGE TYPE, the Account Number entered here will default on the Service Contract Timesheet and may not be overridden. (This processing applies to charge types such as Sick Leave where you would not want users to enter any Account Number for sick time.)

Code Tables

Code Table 700: Job Reference Codes

Job Ref. field - Define codes to provide unique identifiers for service timesheet records.

Copy Record

CTIMESHT - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Copy Service Timesheet

Grants the ability to copy Service Timesheets using the Copy Service Timesheet action.

Copy to New Service Contract

Grants access to the action that makes a duplicate of an existing Service Contract record.

Service Contract to Active

Grants the authority to set a Service Contract record to Active status.

Batch Processes

Process Service Timesheet - sdbp_process_service_timesheet.post_approved_time;

Processes approved labor costs (from service timesheets) that have not yet been posted. Costs are posted to the work order task as a Labor record. If a Labor Requirement record does not yet already exist for the task, the system inserts one, then posts the cost. Once a labor charge is successfully processed, it is marked as posted.

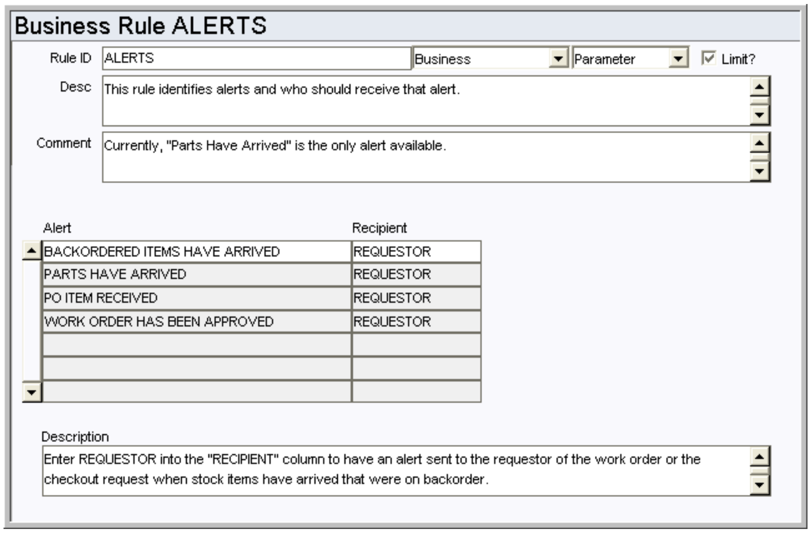
Chapter 6

Inventory Subsystem

Checkout Request Module

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS — Business — Parameter — ☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

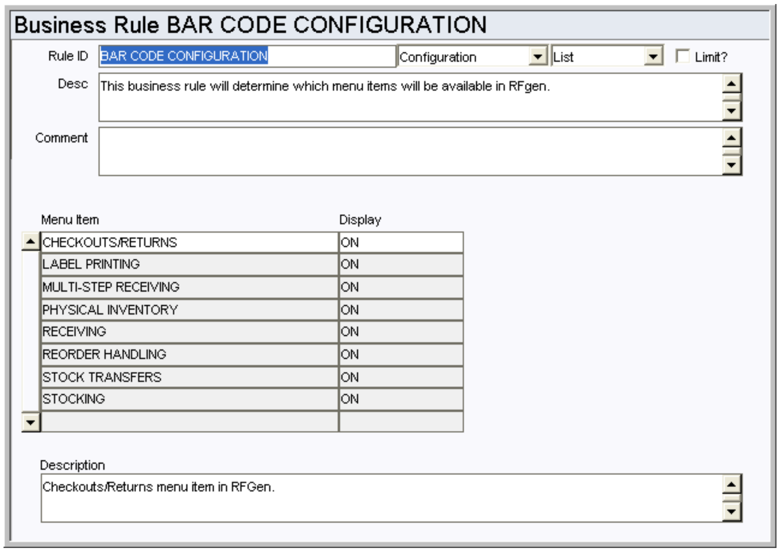
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Bar Code Configuration Rule



Business Rule BAR CODE CONFIGURATION

Rule ID: BAR CODE CONFIGURATION | Configuration | List | ☐ Limit?

Desc: This business rule will determine which menu items will be available in RFgen.

Comment:

Menu Item	Display
CHECKOUTS/RETURNS	ON
LABEL PRINTING	ON
MULTI-STEP RECEIVING	ON
PHYSICAL INVENTORY	ON
RECEIVING	ON
REORDER HANDLING	ON
STOCK TRANSFERS	ON
STOCKING	ON

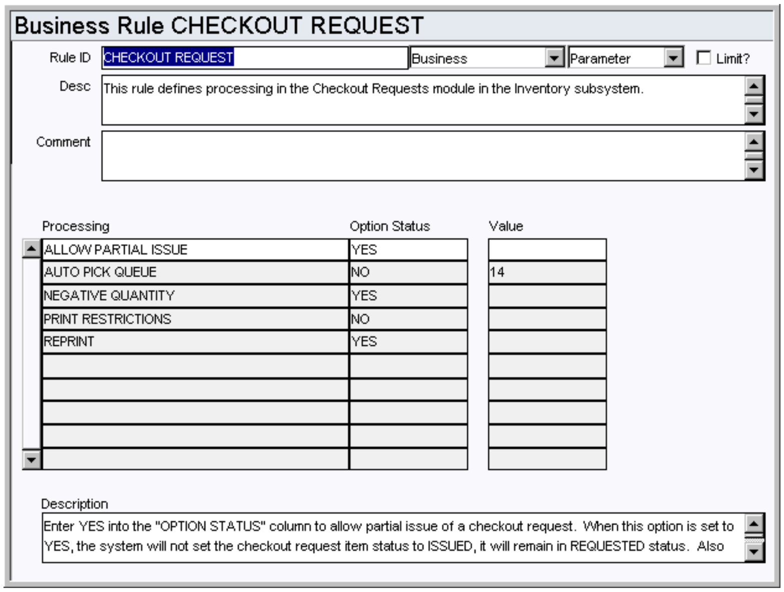
Description: Checkouts/Returns menu item in RFGen.

This rule determines the main menu options available in the RFGen Bar Coding application.

Menu Item and Display
Options set to ON appear on the bar coding main menu.

Checkout Request Rule

Define processing in the Checkout Requests module.



Business Rule CHECKOUT REQUEST

Rule ID: CHECKOUT REQUEST | Business | Parameter | ☐ Limit?

Desc: This rule defines processing in the Checkout Requests module in the Inventory subsystem.

Comment:

Processing	Option Status	Value
ALLOW PARTIAL ISSUE	YES	
AUTO PICK QUEUE	NO	14
NEGATIVE QUANTITY	YES	
PRINT RESTRICTIONS	NO	
REPRINT	YES	

Description: Enter YES into the "OPTION STATUS" column to allow partial issue of a checkout request. When this option is set to YES, the system will not set the checkout request item status to ISSUED, it will remain in REQUESTED status. Also

Processing, Option Status, and Value

ALLOW PARTIAL ISSUE - This rule key determines how the system handles partial issue of items on a checkout request. If this option is set to NO and items are partially issued against a checkout request the system sets the status of the checkout request to Closed and the item status to Issued. With this setting, the system also removes the remaining demand from the storeroom. If this option is set to YES and items are partially issued against a checkout request, the checkout request remains in Active status and the Item status remains in Requested status. With this setting, the system only removes demand from the storeroom for the items that have been issued.

AUTO PICK QUEUE - (AMMO only) This rule key is used by batch and online processing to determine if the checkout requests should automatically be put on the pick queue when Advanced Materials Option is utilized.

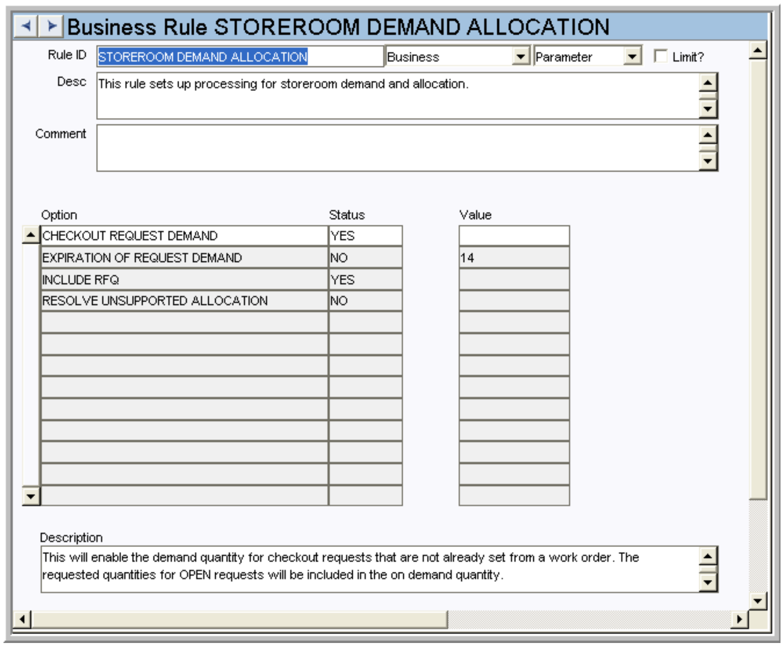
NEGATIVE QUANTITY - Enter YES or NO into the Option Status column to allow or disallow a negative quantity to be entered on a checkout request. This processing does not affect the storeroom quantity levels. This is a flag to alert the storeroom that an item needs to be returned to stock.

Items must be returned to stock in the Stock Checkout module.

PRINT RESTRICTIONS - Enter YES into the Option Status column to allow a checkout request to be changed once it has been printed. Enter NO into the Option Status column to disallow a checkout request to be changed once it has been printed.

REPRINT - Enter YES into the Option Status column to allow a checkout request to be printed more than once. Enter NO into the Option Status column to disallow a checkout request to be printed more than once.

Storeroom Demand Allocation Rule



Rule ID: STOREROOM DEMAND ALLOCATION | Business | Parameter | ☐ Limit?

Desc: This rule sets up processing for storeroom demand and allocation.

Comment:

Option	Status	Value
CHECKOUT REQUEST DEMAND	YES	
EXPIRATION OF REQUEST DEMAND	NO	14
INCLUDE RFQ	YES	
RESOLVE UNSUPPORTED ALLOCATION	NO	

Description: This will enable the demand quantity for checkout requests that are not already set from a work order. The requested quantities for OPEN requests will be included in the on demand quantity.

Set up processing for storeroom demand and allocation.

Option, Status and Value

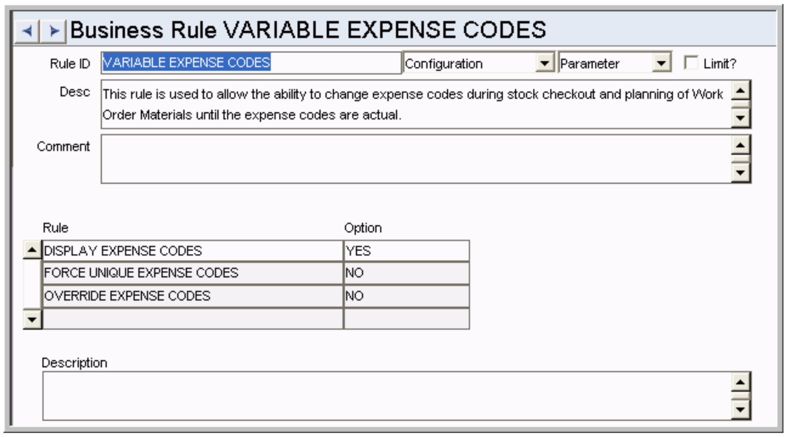
CHECKOUT REQUEST DEMAND - (YES/NO) If this rule key is set to YES, checkout requests in ACTIVE status will be counted in the demand quantity shown in the Storeroom Pricing view of the Storeroom module, and will be factored in whenever storeroom demand is calculated. If the rule key is set to NO checkout requests will not be included in any demand quantity calculations. If the rule key is changed from NO to YES the system does not recalculate existing quantities, but will begin to include ACTIVE checkout requests in calculations made after the change.

INCLUDE RFQ - This rule key determines whether the quantity on Request for Quotes line items in CREATED, APPROVED or ISSUED status which originated from an Approved Requisition are to be included in the Pending Order quantity field on the Storeroom Pricing screen.

EXPIRATION OF REQUEST DEMAND - (Advanced Materials Management Option ONLY).

RESOLVE UNSUPPORTED ALLOCATION - (Advanced Materials Management Option ONLY).

Variable Expense Codes Rule



Business Rule VARIABLE EXPENSE CODES

Rule ID VARIABLE EXPENSE CODES Configuration Parameter ☐ Limit?

Desc This rule is used to allow the ability to change expense codes during stock checkout and planning of Work Order Materials until the expense codes are actual.

Comment

Rule	Option
DISPLAY EXPENSE CODES	YES
FORCE UNIQUE EXPENSE CODES	NO
OVERRIDE EXPENSE CODES	NO

Description

This rule determines how expense codes are handled during stock checkout, checkout request, planning work order task materials and labor, and in the Timekeeping module. Regardless of the settings in this rule, any desired changes to expense codes can only be made before costs are actualized. Once actual costs are applied, the expense code on the record cannot be changed.

Rule and Option

DISPLAY EXPENSE CODES - If you enter YES as the option, the system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for stock checkouts based on Work Orders. Enter NO and the field is not displayed.

FORCE UNIQUE EXPENSE CODES - If you enter YES for this option, work order time charges for the same craft must have the same expense codes. The default setting is YES.

OVERRIDE EXPENSE CODES - Enter YES or NO in the OPTION column to allow or disallow users to change expense codes on timesheets, issue tickets for stock checkout, stock checkout requests, and material and labor detail records on work order tasks.

Entering YES in the OPTION column has the following implications:

- Materials planners will be able to overwrite the default expense codes for the Materials view of the Work Order module in the Maintenance subsystem. The system defaults this information from expense code associated with the Stock Code and Storeroom.

- Employees responsible for creating Issue tickets for stock item checkouts will be able to change the associated Expense code.

- The system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for sock checkouts based on Work Orders. This includes expense codes that have been provided by planners.

- Labor planners will be able to overwrite the default expense codes for Regular and Premium labor on Work Order Tasks. The system defaults this information from the Craft associated with the Work Order Task.

- Workers who enter their own time into the Timekeeping module of the Maintenance subsystem, will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners.

- Supervisors who review timesheets will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners and/or changed by employees on their timesheets.

Combining the Rules:

To keep anyone from changing expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = NO

To allow only Planners to use variable expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = YES

To allow charges for the same craft to use different expense codes:

Display Expense Codes = YES

Force Unique Expense Codes = NO

Override Expense Codes = YES

Code Tables

Code Table 7: Deliver To Location (Length = 10)

Deliver to Location field - Define codes to designate possible delivery locations within your organization. Typical entries include: “North side loading dock” or “Main Warehouse”.

Code Table 100: Checkout Request Priority (Length = 2)

Priority field - Define codes to prioritize checkout requests. Examples include: (1-Regular, 2-Urgent, 3-Emergency).

Copy Record

CHKREQST - COPY RECORD

Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Add Items From Work Order

Grants access to the Add Items from Work Order and Select Items from Work Order actions when a checkout request is in Created status. The list of items comes from the material requirements on the Work Order.

Activate Checkout Request from Schedule

Users with this responsibility will have available a column of check boxes in the Checkout Request view of the Daily Schedule module as well as an action which allows uses to activate the checkout requests from the scheduling record.

Reports

S_RPT026 - Inventory Picklist Report

Lists Stock items to be issued from the storeroom and can be used to provide storeroom personnel a means to prepare Stock for pickup or delivery. This list can be built by either planning Stock items on a work order before the work order is activated or by creating a Checkout Request record.

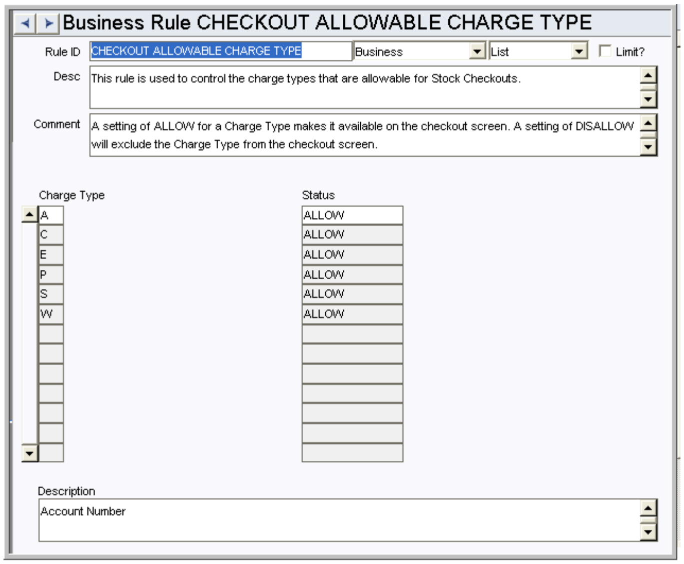
Note: S_RPT026B is the bar code font version of this report.

Stock Checkout Module

Business Rules

Checkout Allowable Charge Type Rule

This rule is used to control the charge types that are allowable for Stock Checkouts. A setting of ALLOW for a Charge Type makes it available on the checkout screen. A setting of DISALLOW will exclude the Charge Type from the checkout screen



Rule ID: CHECKOUT ALLOWABLE CHARGE TYPE | Business | List

Desc: This rule is used to control the charge types that are allowable for Stock Checkouts.

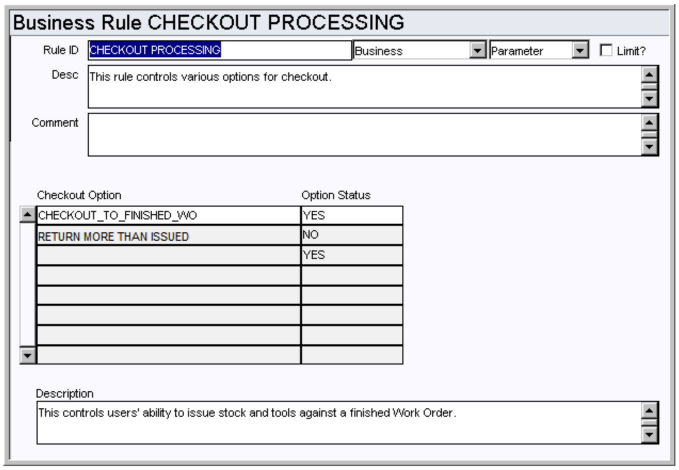
Comment: A setting of ALLOW for a Charge Type makes it available on the checkout screen. A setting of DISALLOW will exclude the Charge Type from the checkout screen.

Charge Type	Status
A	ALLOW
C	ALLOW
E	ALLOW
P	ALLOW
S	ALLOW
W	ALLOW

Description: Account Number

.

Checkout Processing Rule



Rule ID: CHECKOUT PROCESSING | Business | Parameter

Desc: This rule controls various options for checkout.

Comment:

Checkout Option	Option Status
CHECKOUT_TO_FINISHED_WO	YES
RETURN MORE THAN ISSUED	NO
	YES

Description: This controls users' ability to issue stock and tools against a finished Work Order.

Control whether checkouts against work orders in Finished status are allowed. Note that you can always return items against a Finished work order.

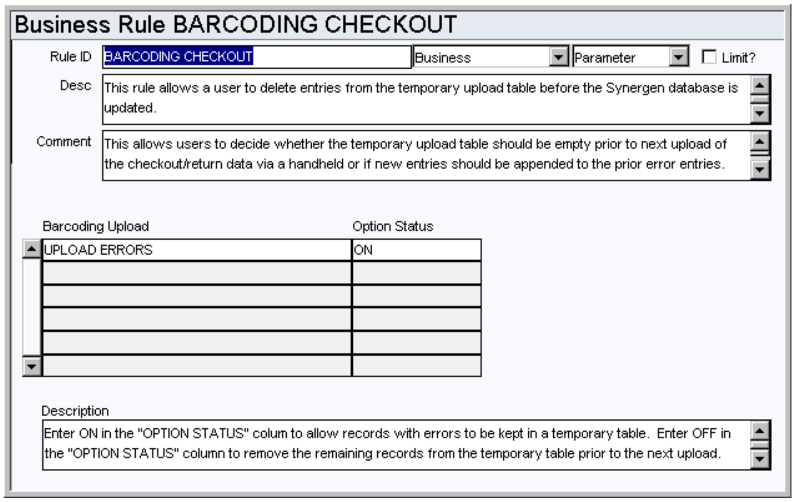
Values that are not described below but that are shown on the Batch Stock Reorder Business Rule list are only used with the Advanced Material Management option.

Checkout Option and Option Status

CHECKOUT_TO_FINISHED_WO - This option controls users' ability to issue stock and tools against a finished Work Order. When this option is set to YES, the list of values for Work Order tasks will only show tasks in Active status. If it is set to NO the list will show tasks in both Active and Finished status.

RETURN MORE THAN ISSUED - If this rule key value is set to YES, users are able to use the Stock Checkout module to return more than what was issued against a work order.

Barcoding Checkout Rule



Business Rule BARCODING CHECKOUT

Rule ID: BARCODING CHECKOUT | Business | Parameter | ☐ Limit?

Desc: This rule allows a user to delete entries from the temporary upload table before the Synergen database is updated.

Comment: This allows users to decide whether the temporary upload table should be empty prior to next upload of the checkout/return data via a handheld or if new entries should be appended to the prior error entries.

Barcoding Upload	Option Status
UPLOAD ERRORS	ON

Description: Enter ON in the "OPTION STATUS" colum to allow records with errors to be kept in a temporary table. Enter OFF in the "OPTION STATUS" column to remove the remaining records from the temporary table prior to the next upload.

Allow deletion of entries from the temporary upload table before the database is updated.

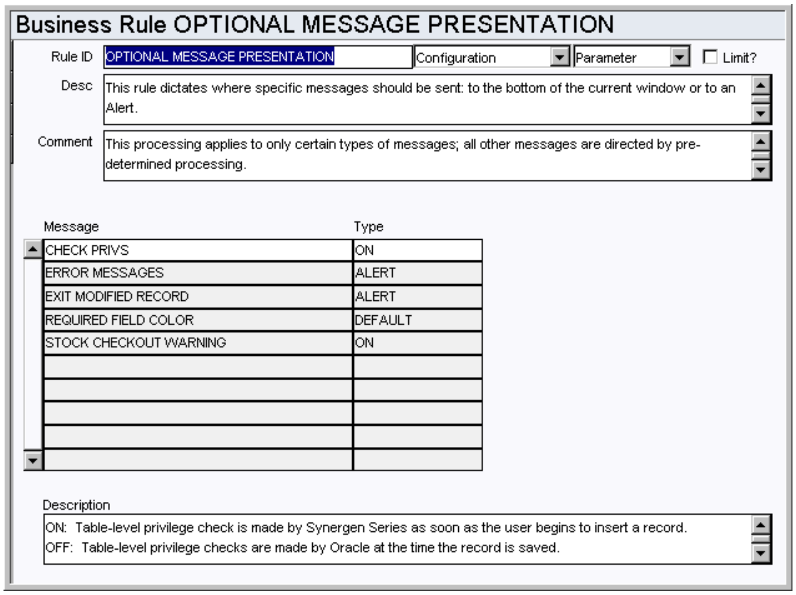
This allows you to decide whether the temporary upload table should be empty prior to next upload of the checkout/return data via a handheld or if new entries should be appended to the prior error entries.

This rule supports a specific interface to the Intermec Janus 2020 (c) hand-held bar code scanner.

Barcoding Upload and Option Status

UPLOAD ERRORS - Enter ON in the OPTION STATUS column to allow records with errors to be kept in a temporary table. Enter OFF in the OPTION STATUS column to remove the remaining records from the temporary table prior to the next upload.

Optional Message Presentation Rule



Business Rule OPTIONAL MESSAGE PRESENTATION

Rule ID: OPTIONAL MESSAGE PRESENTATION | Configuration | Parameter | ☐ Limit?

Desc: This rule dictates where specific messages should be sent: to the bottom of the current window or to an Alert.

Comment: This processing applies to only certain types of messages; all other messages are directed by pre-determined processing.

Message	Type
CHECK PRIVS	ON
ERROR MESSAGES	ALERT
EXIT MODIFIED RECORD	ALERT
REQUIRED FIELD COLOR	DEFAULT
STOCK CHECKOUT WARNING	ON

Description:
ON: Table-level privilege check is made by Synergen Series as soon as the user begins to insert a record.
OFF: Table-level privilege checks are made by Oracle at the time the record is saved.

Indicate when and how certain system messages are displayed.

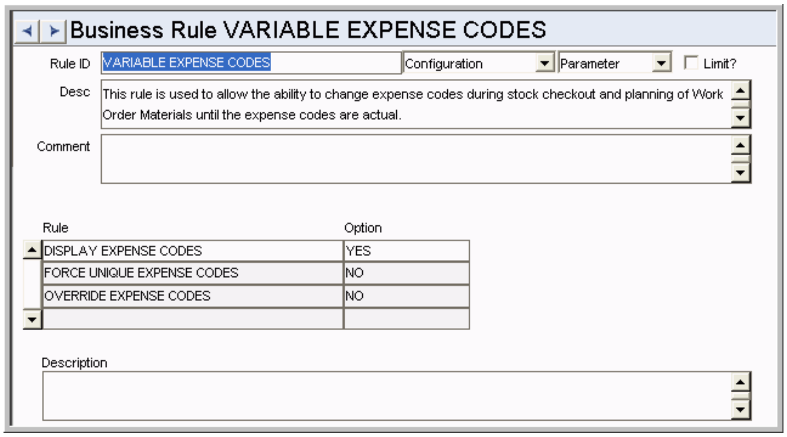
This processing applies to only certain types of messages; all other messages are directed by pre-determined processing.

Message and Type

STOCK CHECKOUT WARNING - Enter ON in the Type column for the system to display a message that the issue quantity on the Work Order Checkout Request record is greater than the estimated quantity on the Work Order Task Material Requirements. This message does not prevent the checkout; it is merely a warning. Enter OFF to prevent the message.

This is the only rule key that applies to the Stock Checkout module. For a description of other keys, please refer to the Administration section.

Variable Expense Codes Rule



Business Rule VARIABLE EXPENSE CODES

Rule ID: VARIABLE EXPENSE CODES | Configuration | Parameter | ☐ Limit?

Desc: This rule is used to allow the ability to change expense codes during stock checkout and planning of Work Order Materials until the expense codes are actual.

Comment:

Rule	Option
DISPLAY EXPENSE CODES	YES
FORCE UNIQUE EXPENSE CODES	NO
OVERRIDE EXPENSE CODES	NO

Description:

This rule determines how expense codes are handled during stock checkout, checkout request, planning work order task materials and labor, and in the Timekeeping module. Regardless of the settings in this rule, any desired changes to expense codes can only be made before costs are actualized. Once actual costs are applied, the expense code on the record cannot be changed.

Rule and Option

DISPLAY EXPENSE CODES - If you enter YES as the option, the system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for stock checkouts based on Work Orders. Enter NO and the field is not displayed.

FORCE UNIQUE EXPENSE CODES - If you enter YES for this option, work order time charges for the same craft must have the same expense codes. The default setting is YES.

OVERRIDE EXPENSE CODES - Enter YES or NO in the OPTION column to allow or disallow users to change expense codes on timesheets, issue tickets for stock checkout, stock checkout requests, and material and labor detail records on work order tasks.

Entering YES in the OPTION column has the following implications:

- Materials planners will be able to overwrite the default expense codes for the Materials view of the Work Order module in the Maintenance subsystem. The system defaults this information from expense code associated with the Stock Code and Storeroom.
- Employees responsible for creating Issue tickets for stock item checkouts will be able to change the associated Expense code.
- The system will display the Regular and Premium Expense Code fields on the employee Timesheet, and the Expense Code field on the Issue Ticket for sock checkouts based on Work Orders. This includes expense codes that have been provided by planners.
- Labor planners will be able to overwrite the default expense codes for Regular and Premium labor on Work Order Tasks. The system defaults this information from the Craft associated with the Work Order Task.
- Workers who enter their own time into the Timekeeping module of the Maintenance subsystem, will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners.
- Supervisors who review timesheets will be able to change the Regular and Premium labor information brought over from the Work Order Task on timesheet entries based on Work Orders. This includes expense codes that have been provided by planners and/or changed by employees on their timesheets.

Combining the Rules:

To keep anyone from changing expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = NO

To allow only Planners to use variable expense codes:

Display Expense Codes = NO

Force Unique Expense Codes = YES

Override Expense Codes = YES

To allow charges for the same craft to use different expense codes:

Display Expense Codes = YES

Force Unique Expense Codes = NO

Override Expense Codes = YES

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Checkout All Planned Items

Grants access to the Checkout All action in the Stock Checkout module.

Reports

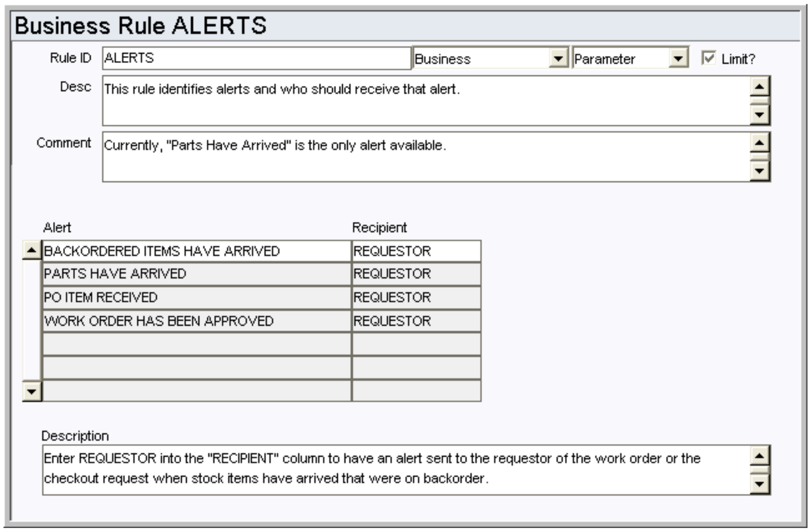
S_RPT020 - Issue Ticket Report

Lists Stock items issued during a single session in the Stock Checkout module, Inventory subsystem. The Stock Checkout module is used to process issues and returns of stock items from and to a storeroom.

Stock Transfer Module

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS | Business | Parameter | ☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

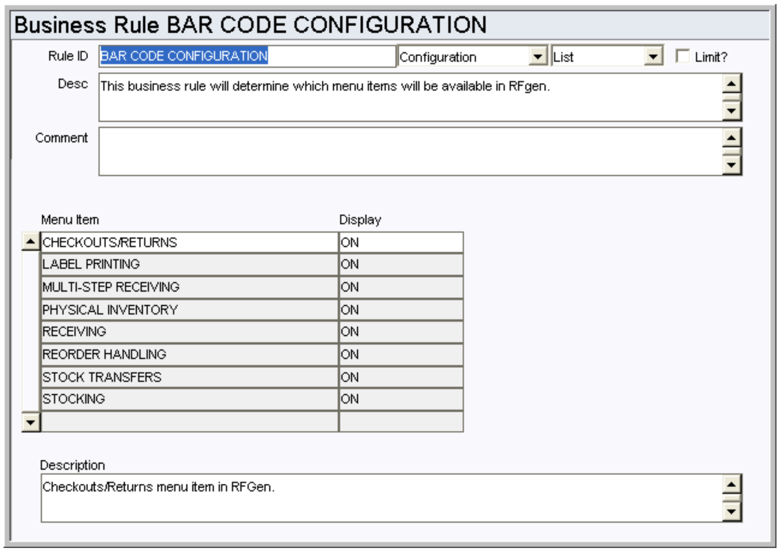
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Bar Code Configuration Rule



Business Rule BAR CODE CONFIGURATION

Rule ID: BAR CODE CONFIGURATION | Configuration | List | ☐ Limit?

Desc: This business rule will determine which menu items will be available in RFgen.

Comment:

Menu Item	Display
CHECKOUTS/RETURNS	ON
LABEL PRINTING	ON
MULTI-STEP RECEIVING	ON
PHYSICAL INVENTORY	ON
RECEIVING	ON
REORDER HANDLING	ON
STOCK TRANSFERS	ON
STOCKING	ON

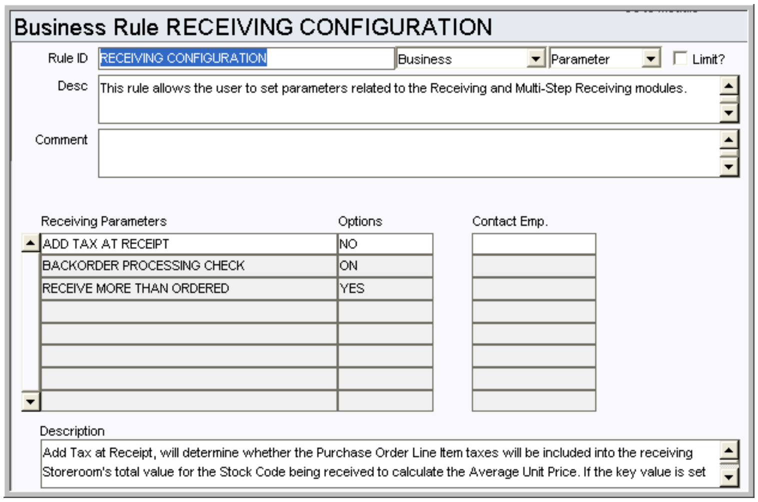
Description: Checkouts/Returns menu item in RFGen.

This rule determines the main menu options available in the RFGen Bar Coding application.

Menu Item and Display

Options set to ON appear on the bar coding main menu.

Receiving Configuration Rule



Business Rule RECEIVING CONFIGURATION

Rule ID: RECEIVING CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule allows the user to set parameters related to the Receiving and Multi-Step Receiving modules.

Comment:

Receiving Parameters	Options	Contact Emp.
ADD TAX AT RECEIPT	NO	
BACKORDER PROCESSING CHECK	ON	
RECEIVE MORE THAN ORDERED	YES	

Description: Add Tax at Receipt, will determine whether the Purchase Order Line Item taxes will be included into the receiving Storeroom's total value for the Stock Code being received to calculate the Average Unit Price. If the key value is set

This rule allows users to set parameters related to the Receiving, Multi-Step Receiving, and Stock Transfer modules.

Receiving Parameters and Options

ADD TAX AT RECEIPT - Set this key to YES to have the system calculate the average unit price for items by including taxes and exchange rates included in the final invoiced price. This allows the system to reflect the true cost of procurement of the item. When the key is set to NO taxes are not factored into the cost.

BACKORDER PROCESSING CHECK - This rule key allows you to enable or disable checking of backordered items in the Receiving, Multi-Step Receiving, and Stock Transfer modules. Set this option to ON if you want the system to prompt the user with a listing of Checkout Requests and Work Orders that require the backordered item when other items on the Purchase Order are received.

Reports

S_RPT115 - Stock Transfer Report

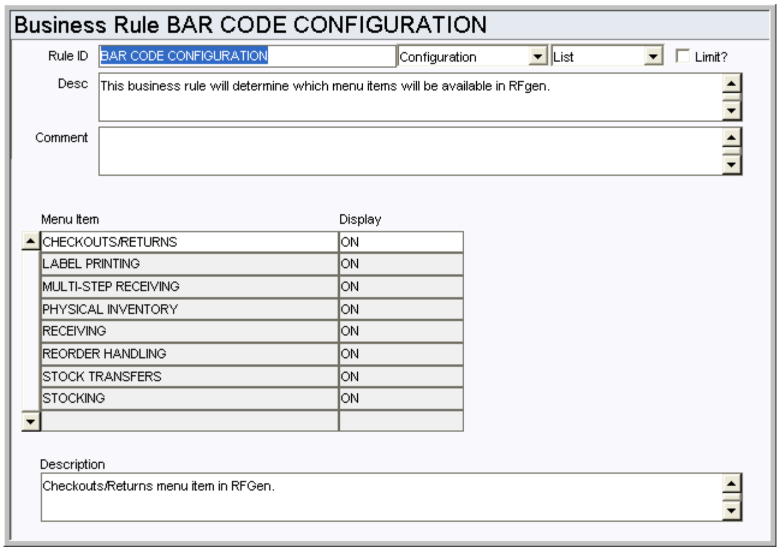
Lists Stock items to be issued from one storeroom and received in another.

Note: S_RPT115B is the bar code font version of this report.

Storeroom Stocking Module

Business Rules

Bar Code Configuration Rule



Business Rule BAR CODE CONFIGURATION

Rule ID: BAR CODE CONFIGURATION | Configuration | List | ☐ Limit?

Desc: This business rule will determine which menu items will be available in RFgen.

Comment:

Menu Item	Display
CHECKOUTS/RETURNS	ON
LABEL PRINTING	ON
MULTI-STEP RECEIVING	ON
PHYSICAL INVENTORY	ON
RECEIVING	ON
REORDER HANDLING	ON
STOCK TRANSFERS	ON
STOCKING	ON

Description: Checkouts/Returns menu item in RFGen.

This rule determines the main menu options available in the RFGen Bar Coding application.

Menu Item and Display

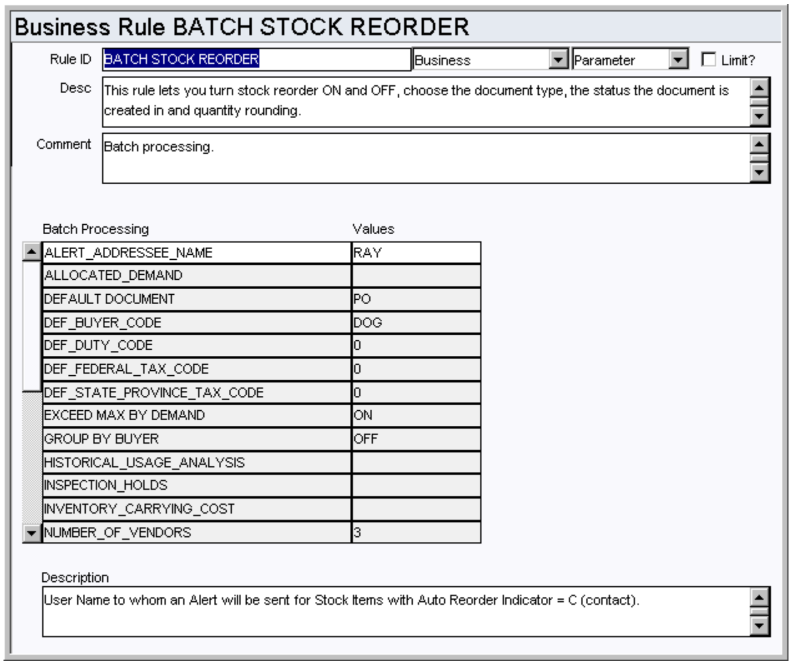
Options set to ON appear on the bar coding main menu.

Reorder Review Module

When inventory levels for a stock item fall below reorder points you have set, the system automatically creates Reorder Review records for the stock item, provided that you have marked the item for reorder review in the storeroom. Reorder Review records include the quantity that batch processing has determined must be ordered to increase the current inventory to the maximum level, along with other information from the Storeroom record. Once reorder records are approved by a reviewer, batch processing completes the processing by generating the appropriate purchasing document.

Business Rules

Batch Stock Reorder Rule



Business Rule BATCH STOCK REORDER

Rule ID: BATCH STOCK REORDER | Business | Parameter | ☐ Limit?

Desc: This rule lets you turn stock reorder ON and OFF, choose the document type, the status the document is created in and quantity rounding.

Comment: Batch processing.

Batch Processing	Values
ALERT_ADDRESSEE_NAME	RAY
ALLOCATED_DEMAND	
DEFAULT DOCUMENT	PO
DEF_BUYER_CODE	DOG
DEF_DUTY_CODE	0
DEF_FEDERAL_TAX_CODE	0
DEF_STATE_PROVINCE_TAX_CODE	0
EXCEED MAX BY DEMAND	ON
GROUP BY BUYER	OFF
HISTORICAL_USAGE_ANALYSIS	
INSPECTION_HOLDS	
INVENTORY_CARRYING_COST	
NUMBER_OF_VENDORS	3

Description: User Name to whom an Alert will be sent for Stock Items with Auto Reorder Indicator = C (contact).

Control several of the re-order processing elements using this rule. These include turning automatic stock reorder processing on or off, the type of document to be produced by stock reorder (Purchase Order or Requisition, including setting the default buyer, federal tax and state tax codes), the status that document is to be created in, and whether to round the order quantity up or down.

Batch Processing and Values

ALERT_ADDRESSEE_NAME - The username for the person who will receive an Alert when batch selects stock items with an Auto Reorder Indicator of “C” (Contact).

ALLOCATED_DEMAND (Advanced Materials Management Option) - Determines whether the system will include allocated demand quantities in the calculation for Available Quantity. This option is only used when reorder method is set to option 2.

DEFAULT DOCUMENT - Determines the type of document to be created. Enter PO in the VALUES column to generate Purchase Orders. Enter REQ in the VALUES column to generate Requisitions or RFQ in the VALUES column to generate a Request for Quote.

DEF_BUYER_CODE - Default Buyer Code that will appear on the created document. In some instances this value MUST be set so that automatic reorder will function properly. If the Reorder Type field on the Reorder Review record is set to Reorder Review or Auto-Reorder and this value is left blank, the intended purchasing document is not created, even if the Buyer field is populated on the Master Catalog and/or Storeroom.

DEF_DUTY_CODE - Default Duty Code that will appear on the created document.

DEF_FEDERAL_TAX_CODE - Default Federal Tax Code that will appear on the created document.

DEF_STATE_PROVINCE_TAX_CODE - Default State/Provincial Tax code that will appear on the created document.

EXCEED MAX BY DEMAND - determines how much the system orders on automatic reorder. If this rule key is set to ON, the system orders enough to reach the maximum allowed quantity plus the amount that is on demand. On demand quantity is defined as the demand placed on the storeroom from active work orders and checkout requests. Setting the rule key to ON insures that stores will remain at the maximum level after the demand has been fulfilled.

If the rule key is set to OFF the system only orders enough to reach the maximum, regardless of how demand may later affect stores quantities. Setting the rule key to OFF could mean that stores will need to be ordered more frequently and you can therefore expect to issue more purchasing documents. However, this setting could also prevent the system from ordering against demand that may never actually result in items being removed from the storeroom.

GROUP BY BUYER - Turns ON or OFF the use of buyer code from the catalog to group items on PO's or Requisitions. The default is OFF.

HISTORICAL_USAGE_ANALYSIS (Advanced Materials Management Option)- The number of months to use for average daily usage analysis. This number is used for reorder recommendations. Only used when reorder method is set to Option 2.

INSPECTION_HOLDS (Advanced Materials Management Option) - Used in the calculation for available quantity during batch stock reorder. Only used when reorder method is set to option 2.

INVENTORY_CARRYING_COST (Advanced Materials Management Option) - Calculate the Economic Order Quantity of a storeroom. Only used when reorder method is set to option 2.

NUMBER OF VENDORS - Represents the number of vendors the system will create for the RFQ Bidders List. Only used when the Value in DEFAULT_DOCUMENT is RFQ.

ON DEMAND QUANTITY INCLUDED - determines when the system triggers automatic reorder. If the rule key is set to ON the system subtracts the on demand quantity from the available quantity to determine whether or not stores have fallen below the reorder point. On demand quantity is defined as the demand placed on the storeroom from active work orders and checkout requests. This setting can reduce the number of purchasing documents that are generated because it anticipates future stores depletion as well as taking into account actual stores depletion.

If the rule key is set to OFF, only the available quantity in the storeroom is considered in determining whether or not stores should be reordered. This setting may prevent the system from ordering against demand that never results in items being removed from the storeroom.

PENDING DISPOSITION INCLUDED - Determines if the pending disposition quantity should be included in the on hand quantity for reorder calculations. The default is ON.

PLANNED_ORDERS - Used in the calculation for Available Quantity during batch stock reorder. Only used when reorder method is set to option 2.

PO_PROCESSING_COST_AUTO (obsolete - Advanced Materials Management Option only) - The cost for automatically processing a stores reorder PO. This number is used to calculate the Economic Order Quantity of a storeroom. Only used when reorder method is set to option 2.

PO_PROCESSING_COST_CONTACT (obsolete - Advanced Materials Management Option only) - The cost for processing a stores reorder PO with contact. This number is used to calculate the Economic Order Quantity of a storeroom. Only used when reorder method is set to option 2.

PO_PROCESSING_COST_REVIEW (obsolete - Advanced Materials Management Option only) - The cost for processing a stores reorder PO with reorder review. This number is used to calculate the Economic Order Quantity of a storeroom. Only used when reorder method is set to option 2.

PO STATUS - Purchase Orders may be automatically created in one of three statuses: CREATED, APPROVED and ISSUED. Enter the desired status in the VALUES column.

REORDER_METHOD - Set to Option 1. Before the AMMO rule keys became obsolete, this rule key determined whether AMMO was turned on (Option 2) or off (Option1).

REPAIR QUANTITY INCLUDED - Determines if the repair quantity should be included in the on-hand quantity.

REQUISITION CHECK - If set to ON, items on a valid requisition will not be included in Batch Stock Reorder. Related to Rule - REQUISITION STATUS.

REQUISITION STATUS - The status to be used when batch generates a Requisition. Only used when the Value in DEFAULT_DOCUMENT is REQ.

RFQ REQUIRED DATE LEADTIME - The system will use the value entered here to calculate the Required Date on RFQ records that are generated by batch. The Required Date will be calculated as (Sysdate + value). This is only used when the reorder method is set to option 2.

REQUIRED_DATE_BY_LEAD_TIME - (obsolete - Advanced Materials Management Option only)

RFQ STATUS - The status to be used when batch generates a Request for Quote. Only used when the Value in DEFAULT_DOCUMENT is RFQ.

ROUNDING - Dictates whether to round the order quantity up or down with respect to the Maximum (Storeroom) Quantity and the Purchase Quantity. Setting the VALUES column to UP indicates that the reorder quantity may exceed Maximum Quantity by Purchase Quantity minus 1 (rounding up). Setting the VALUES column to DOWN indicates that the reorder quantity will reach but never exceed Maximum Quantity (rounding down).

STOREROOM REORDER PROCESSING - Allows the user to choose which default tax and buyer information will be used for re-order processing. Select either Master Catalog (CATALOG) or Storeroom (STOREROOM).

If a Buyer and Taxes are entered in the Storeroom Override view in the Storeroom module, these values are used when the system creates POs or Requisitions even if a Blanket Contract is referenced.

The Ship to Code on Purchase Orders and Requisitions is set to the storeroom item being ordered. Note that there will only be one storeroom (multiple items) per Purchase Order or Requisition.

UNALLOCATED_DEMAND - Used in the calculation for Available Quantity during batch stock reorder. Only used when reorder method is set to option 2.

Batch Processes

Stock Reorder - sdbp_stock_reoder.stock_reorder;

Reviews all storeroom items, selecting those that are set up for automatic reorder and processes those items that have reached their reorder point. This process uses settings in the Batch Stock Reorder Business Rule to calculate the quantity to reorder. The basic calculation is:

reorder_quantity = maximum_quantity - (inventory_quantity + in receipt quantity + on_order_quantity + reorder_quantity + repair_quantity)

You can set a custom batch process to run SDBP_STOCK_REORDER on a specific storeroom by entering that storeroom in the job parameters.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Reorder Wizard

Grants the ability to create and approve reorder records.

Reports

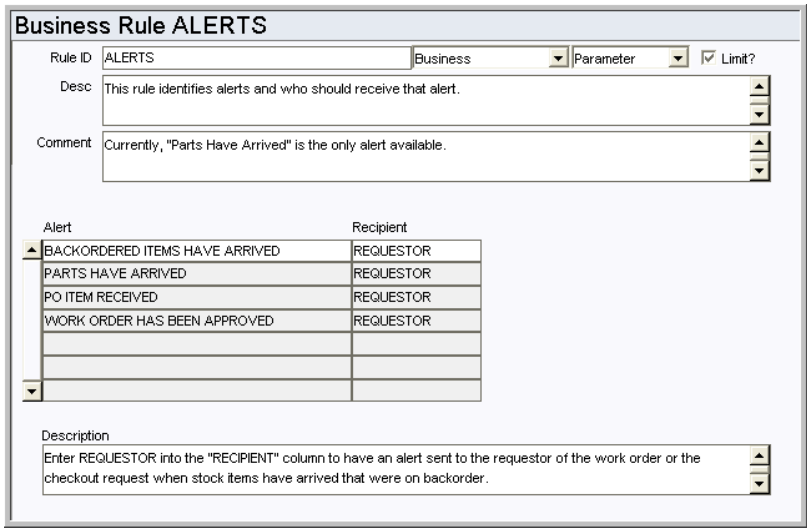
S_RPT028 - About to Reorder Report

Lists storeroom items due for reorder.

Receiving Module

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS — Business — Parameter — ☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

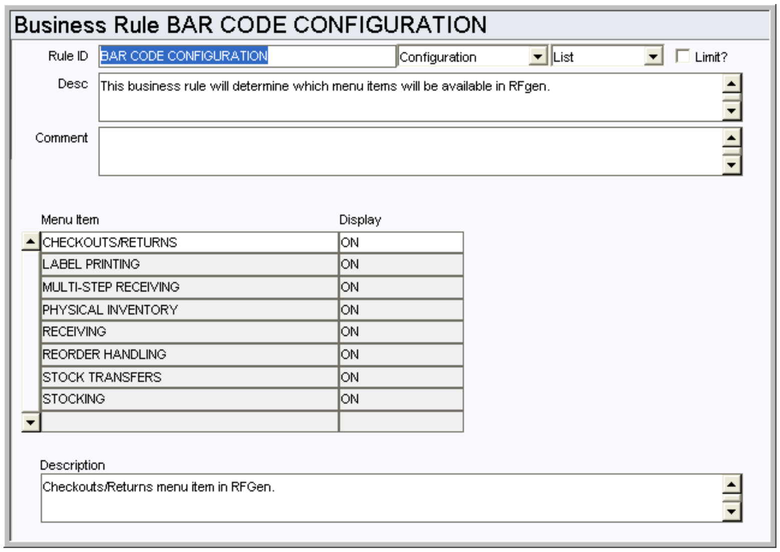
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Bar Code Configuration Rule



Business Rule BAR CODE CONFIGURATION

Rule ID	BAR CODE CONFIGURATION
	Configuration
	List
	☐ Limit?
Desc	This business rule will determine which menu items will be available in RFgen.
Comment	

Menu Item	Display
CHECKOUTS/RETURNS	ON
LABEL PRINTING	ON
MULTI-STEP RECEIVING	ON
PHYSICAL INVENTORY	ON
RECEIVING	ON
REORDER HANDLING	ON
STOCK TRANSFERS	ON
STOCKING	ON

Description

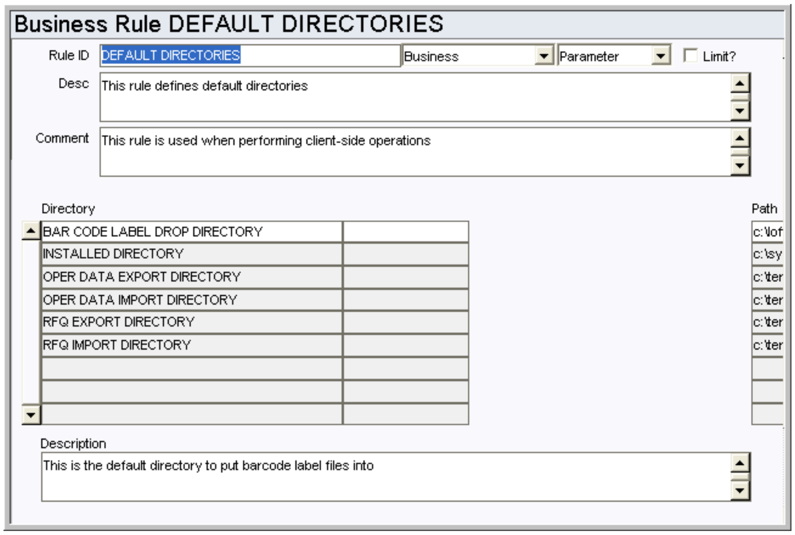
Checkouts/Returns menu item in RFGen.

This rule determines the main menu options available in the RFGen Bar Coding application.

Menu Item and Display

Options set to ON appear on the bar coding main menu.

Default Directories Rule



Business Rule DEFAULT DIRECTORIES

Rule ID	DEFAULT DIRECTORIES
	Business
	Parameter
	☐ Limit?
Desc	This rule defines default directories
Comment	This rule is used when performing client-side operations

Directory		Path
BAR CODE LABEL DROP DIRECTORY		c:\lof
INSTALLED DIRECTORY		c:\sy
OPER DATA EXPORT DIRECTORY		c:\ter
OPER DATA IMPORT DIRECTORY		c:\ter
RFQ EXPORT DIRECTORY		c:\ter
RFQ IMPORT DIRECTORY		c:\ter

Description

This is the default directory to put barcode label files into

Define default directories for use when performing client-side operations.

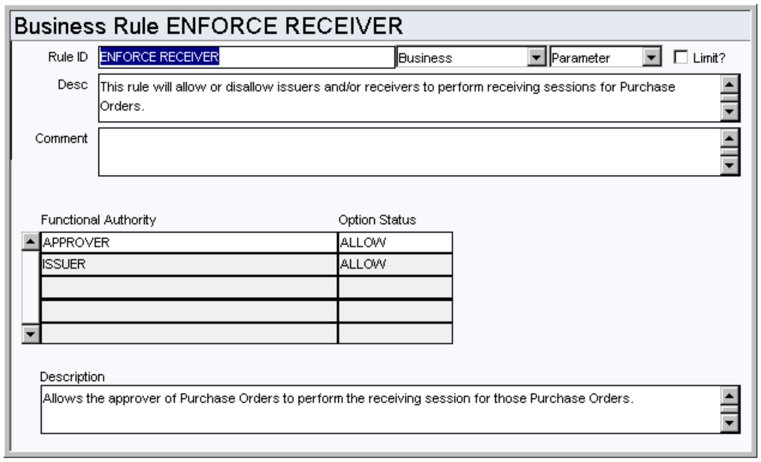
Directory

COMPONENT UPLOAD DIRECTORY - This is the directory where files are stored when they are uploaded to support receiving multiple trackable components.

Path

This is the hard drive storage location for the corresponding file.

Enforce Receiver Rule



Business Rule ENFORCE RECEIVER

Rule ID: ENFORCE RECEIVER | Business | Parameter | ☐ Limit?

Desc: This rule will allow or disallow issuers and/or receivers to perform receiving sessions for Purchase Orders.

Comment:

Functional Authority	Option Status
APPROVER	ALLOW
ISSUER	ALLOW

Description: Allows the approver of Purchase Orders to perform the receiving session for those Purchase Orders.

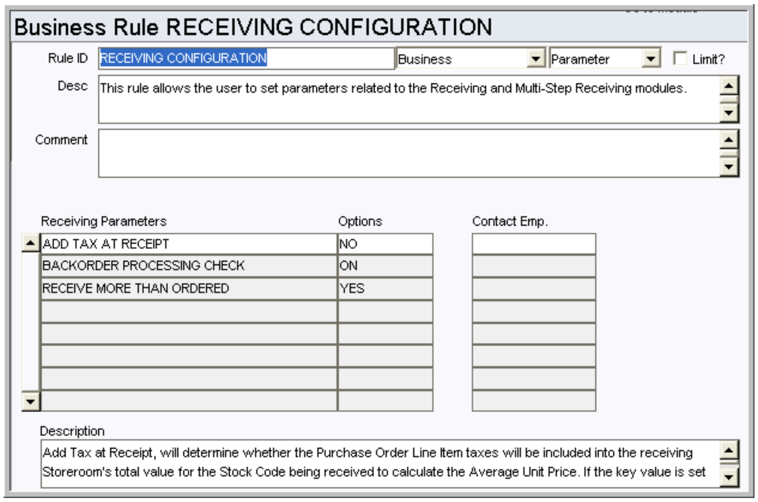
Determine whether or not the issuer and/or approver of a Purchase Order are allowed to perform the receiving session for the PO that the issued or approved.

Functional Authority and Option Status

APPROVER - By setting the OPTION STATUS column to ALLOW, you give the approver of Purchase Orders the ability to also receive the items. To prevent receiving, set the OPTION STATUS column to DISALLOW.

ISSUER - By setting the OPTION STATUS column to ALLOW, you give the issuer of Purchase Orders the ability to also receive the items. To prevent receiving, set the OPTION STATUS column to DISALLOW.

Receiving Configuration Rule



Business Rule RECEIVING CONFIGURATION

Rule ID: RECEIVING CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule allows the user to set parameters related to the Receiving and Multi-Step Receiving modules.

Comment:

Receiving Parameters	Options	Contact Emp.
ADD TAX AT RECEIPT	NO	
BACKORDER PROCESSING CHECK	ON	
RECEIVE MORE THAN ORDERED	YES	

Description: Add Tax at Receipt, will determine whether the Purchase Order Line Item taxes will be included into the receiving Storeroom's total value for the Stock Code being received to calculate the Average Unit Price. If the key value is set

This rule allows users to set parameters related to the Receiving, Multi-Step Receiving, and Stock Transfer modules.

Receiving Parameters and Options

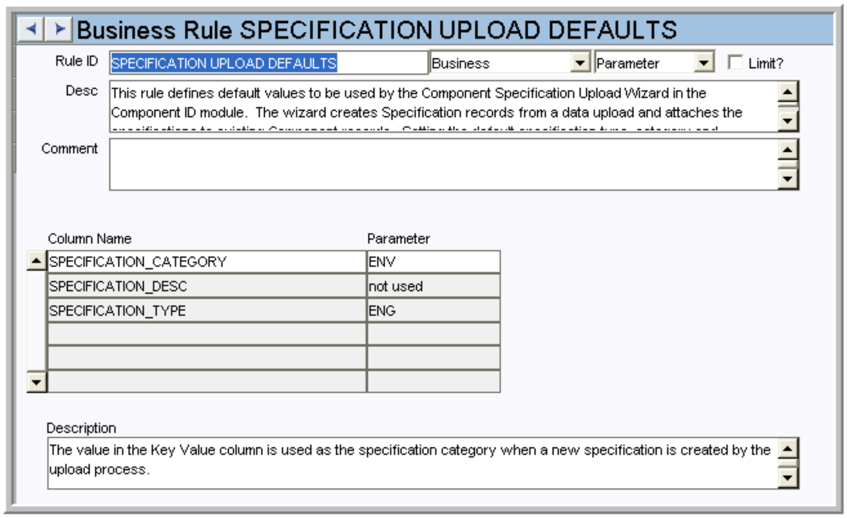
ADD TAX AT RECEIPT - When this rule key is set to YES the system calculates the average unit price for stock items by including any taxes and exchange rates included in the final invoiced price. This allows the system to reflect the true cost of procurement of the item. When the key is set to NO taxes are not factored into the cost.

BACKORDER PROCESSING CHECK - This rule key allows you to enable or disable checking of backordered items in the Receiving, Multi-Step Receiving, and Stock Transfer modules. Set this option to ON if you want the system to prompt the user with a listing of Checkout Requests and Work Orders that require the backordered item when other items on the Purchase Order are received.

RECEIVE MORE THAN ORDERED - This rule key controls whether or not users can receive quantities that exceed the quantity ordered on a purchase order. The setting applies to items received in the Receiving module or the Multi-Step Receiving module. If the key is set to YES (default), quantities greater than the PO item quantity can be received without any warnings or errors being displayed. If the key is set to NO, any attempt to receive quantities greater than the PO item quantity results in an error. If the key is set to RESTRICT, only authorized users can receive quantities that exceed the PO item quantity. Authorization is granted by adding the Receive More Than Ordered function to a user's responsibilities. The Contact Emp. field indicates the person who is primarily responsible for providing authorization to restricted users when needed. The list of values for this list is populated with the name of any user that has the Receive More Than Ordered function in their responsibility profile. When the item is received, the system prompts the authorized user for their username and PIN to authorize the receipt.

Specification Upload Defaults

This rule defines default values to be used by the Component Specification Upload Wizard in the Component ID module. The wizard creates Specification records from a data upload and attaches the specifications to existing Component records. Setting the default specification type, category and description in this rule ensures that new Specification records can be created by the upload process without errors.



Business Rule SPECIFICATION UPLOAD DEFAULTS

Rule ID: SPECIFICATION UPLOAD DEFAULTS | Business | Parameter | ☐ Limit?

Desc: This rule defines default values to be used by the Component Specification Upload Wizard in the Component ID module. The wizard creates Specification records from a data upload and attaches the

Comment:

Column Name	Parameter
SPECIFICATION_CATEGORY	ENV
SPECIFICATION_DESC	not used
SPECIFICATION_TYPE	ENG

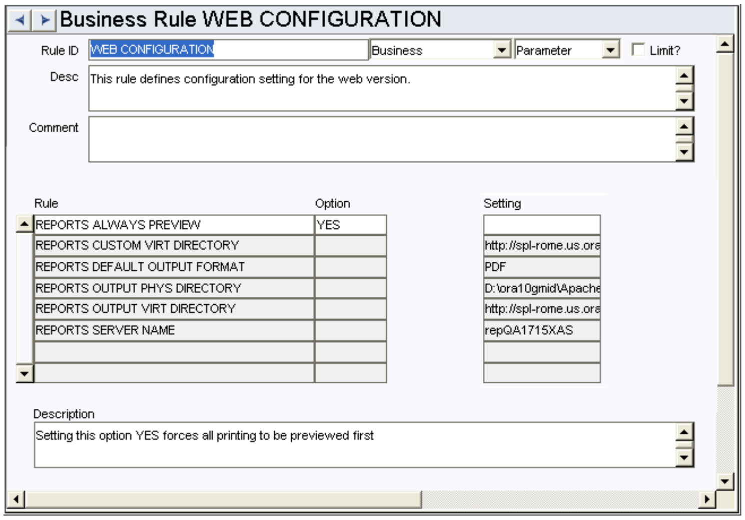
Description: The value in the Key Value column is used as the specification category when a new specification is created by the upload process.

The combination of specification type and category must match a type and category combination defined in the Specification Template module.

To use this functionality, sequence numbering for SA_SPECIFICATION_DATA and SA_COMPONENT_ID must be system generated. Open the Sequence Numbers module and make sure that there is a check in the Sys column for these tables.

Note that the SPECIFICATION_DESC parameter uses the Description as the user entered value rather than the Key Value. This is different than the other two parameters which use Key Value as the user defined string.

Web Configuration Rule



Business Rule WEB CONFIGURATION

Rule ID: WEB CONFIGURATION — Business — Parameter — ☐ Limit?

Desc: This rule defines configuration setting for the web version.

Comment:

Rule	Option	Setting
REPORTS ALWAYS PREVIEW	YES	
REPORTS CUSTOM VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS DEFAULT OUTPUT FORMAT		PDF
REPORTS OUTPUT PHYS DIRECTORY		D:\ora10gmid\Apache
REPORTS OUTPUT VIRT DIRECTORY		http://spl-rome.us.ora
REPORTS SERVER NAME		repQA1715XAS

Description: Setting this option YES forces all printing to be previewed first

Define web configuration settings.

Rule, Option, and Setting

Enter YES or NO in the Option column for each of the rule keys. Also enter the file path or format (as appropriate) in the Setting column.

UPLOAD DIRECTORY - This is the directory where files are stored when they are uploaded to support receiving multiple trackable stock items.

Batch Processes

Check Received PO Item - sdbp_chk_issd_po_item;

Sends an alert to the PO Item Requestor if the PO is fully received. This procedure looks for all issued PO records. For each PO line item with the field Receipts-Fully Received = Y, an Alert will be sent to the Requestor via the home page inbox. If the Requestor is invalid or null, a message will go to the job manager. The field Sent Alert Indicator on the PO Item is set to Y after an Alert/Job Log Message is sent. The Alert will only be sent once.

Invoice Resolution - sdbp_invoice-resolution;

Uses the INVOICE SETUP CRITERIA Business Rule for determining whether mismatched invoice processing is allowed, and tries to resolve mismatched invoices to PO receiving.

Cost Accruals - sdbp_cost_accruals.cost_accruals;

Accrues costs for receiving transactions that have not yet been posted. Information is selected from the table SA_RECEIVING_LOG and posted throughout the system as required.

Code Tables

Code Table 81 - Loftware Labels (Length = 15)

When a user selects Print Bar Code Labels from the Actions list in the Receiving or Multi-Step Receiving modules the screen below opens. Code Table 81 is only used if the client has purchased the Loftware Software and wants to print bar code labels. Examples: Tracking Labels, Generic Labels, Receiving Labels.

Examples: Tracking Labels, Generic Labels, Receiving Labels

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Bar Code Print Labels

Grants the ability to print barcode labels from the Multi-Step Receiving record.

Receive More Than Ordered

Grants the ability to receive a greater quantity than what was originally ordered on a purchase order. This functionality is also controlled by the Receiving Configuration business rule. Persons with this responsibility must also have a PIN set up.

Receive All Items As Ordered

Grants access to the Receive All as Ordered Action.

Reports

S_RPT107 - Delivery Receiving Report

Summarizes Purchase Order and Receiving information for selected Receiving sessions.

S_RPT047 - Receipt Delivery Worksheet Report

Lists information regarding items received.

S_RPT025 - Receiving Report

Lists summary Purchase Order and Receiving information for selected Receiving sessions.

S_RPT216 - Receiving Report

Summarizes receiving records by Purchase Order number detailing items received, by whom, receipt date, and other applicable information.

S_RPT037 - Receiving Worksheet Report

Lists items to be received as well as any existing Receiving information.

Multi-Step Receiving Module

Fields

Sequence No.: Delivery ID

The record number is comprised of a unique ID (Ex. “02000006”). Multi-Step Receiving record numbers are typically set to be system generated.

TABLE NAME - SA_DELIVERY - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

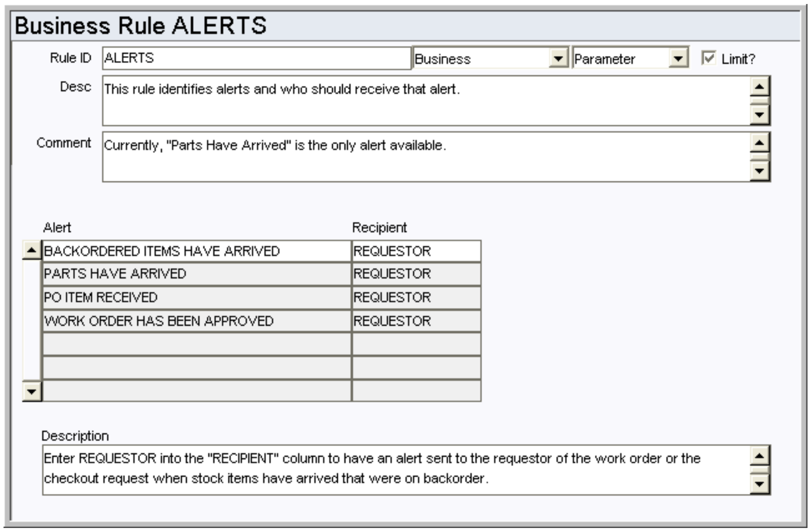
User-Defined

Configure User-Defined fields as needed for your organization. Please refer to the User Guide for more information.

If you use user-defined fields in the Purchase Order module AND you use Multi-Step Receiving, you must make sure that both modules have the same user defined fields.

Business Rules

Alerts Rule



Business Rule ALERTS

Rule ID: ALERTS

Business

Parameter

☑ Limit?

Desc: This rule identifies alerts and who should receive that alert.

Comment: Currently, "Parts Have Arrived" is the only alert available.

Alert	Recipient
BACKORDERED ITEMS HAVE ARRIVED	REQUESTOR
PARTS HAVE ARRIVED	REQUESTOR
PO ITEM RECEIVED	REQUESTOR
WORK ORDER HAS BEEN APPROVED	REQUESTOR

Description: Enter REQUESTOR into the "RECIPIENT" column to have an alert sent to the requestor of the work order or the checkout request when stock items have arrived that were on backorder.

This business rule identifies system alerts that are available and who should receive the alert. New Alert types cannot be created.

Alert and Recipient

BACKORDERED ITEMS HAVE ARRIVED - Work Orders and Checkout Requests - Enter REQUESTOR in the Recipient column to have an alert sent to the requestor when backordered items come in. The requestor who's Issue Ticket Report has been printed will receive the alert.

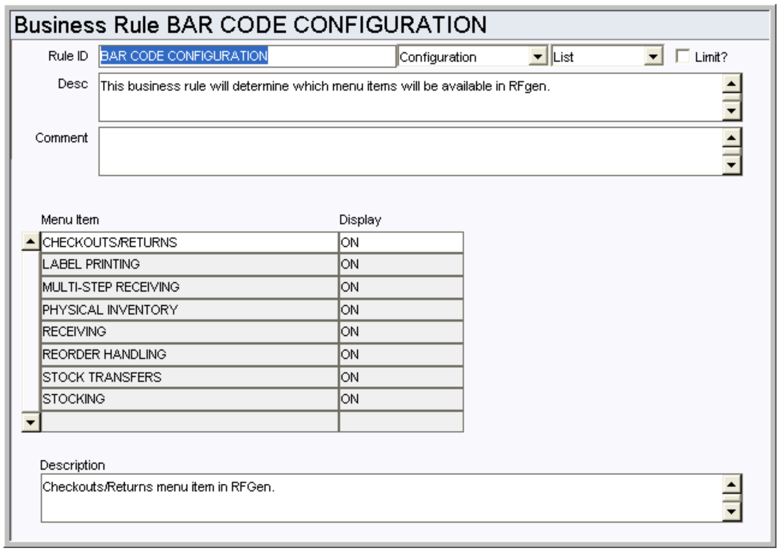
PARTS HAVE ARRIVED - Work Order - Enter REQUESTOR or PLANNER in the RECIPIENT column to have an alert sent to the requestor or planner of a work order with a direct purchase is received in the Receiving module. The default is REQUESTOR. When this is set to PLANNER the alert is sent to the planner indicated on the work order task, not on the work order.

PO ITEM RECEIVED - Requisition - Enter REQUESTOR in the PO ITEM RECEIVED column to have an alert sent to the requestor identified on the Requisition when the requested PO item is received.

WORK ORDER HAS BEEN APPROVED - Work Order - Enter REQUESTOR in the RECIPIENT column to have an alert sent to the work order requestor when approval has been processed for the work order.

WO FINISH WITH OPEN PO OR REQ - Purchase Order, Requisition - Enter the person who should receive an alert when a Work Order that references an open purchase order or requisition is set to Finished status. The Default setting is to BOTH.

Bar Code Configuration Rule



Business Rule BAR CODE CONFIGURATION

Rule ID: BAR CODE CONFIGURATION | Configuration | List | ☐ Limit?

Desc: This business rule will determine which menu items will be available in RFgen.

Comment:

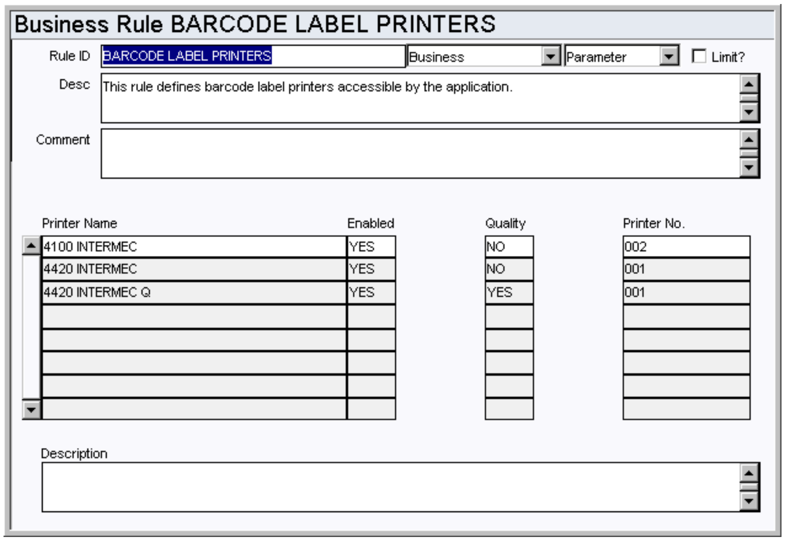
Menu Item	Display
CHECKOUTS/RETURNS	ON
LABEL PRINTING	ON
MULTI-STEP RECEIVING	ON
PHYSICAL INVENTORY	ON
RECEIVING	ON
REORDER HANDLING	ON
STOCK TRANSFERS	ON
STOCKING	ON

Description: Checkouts/Returns menu item in RFGen.

This rule determines the main menu options available in the RFGen Bar Coding application.

Menu Item and Display
Options set to ON appear on the bar coding main menu.

Barcode Label Printers Rule



Business Rule BARCODE LABEL PRINTERS

Rule ID: BARCODE LABEL PRINTERS | Business | Parameter | ☐ Limit?

Desc: This rule defines barcode label printers accessible by the application.

Comment:

Printer Name	Enabled	Quality	Printer No.
4100 INTERMEC	YES	NO	002
4420 INTERMEC	YES	NO	001
4420 INTERMEC Q	YES	YES	001

Description:

The Barcode Label Printers Rule defines barcode label printers accessible by the application.

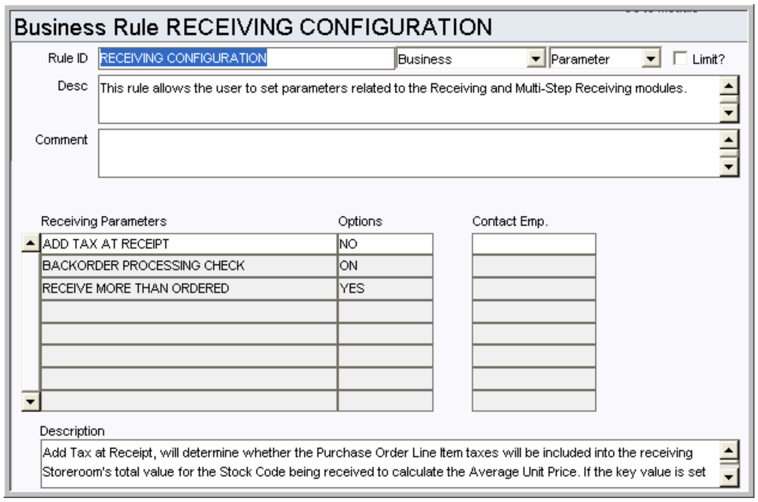
Printer Name
Enter the names of the designated printers.

Enabled
Enter YES or NO to specify whether or not the named printer is enabled.

Quality
Use this field to designate print quality.

Printer No.
Enter the Printer number to print to. Printer numbers are determined by your organization.

Receiving Configuration Rule



Business Rule RECEIVING CONFIGURATION

Rule ID: RECEIVING CONFIGURATION | Business | Parameter | ☐ Limit?

Desc: This rule allows the user to set parameters related to the Receiving and Multi-Step Receiving modules.

Comment:

Receiving Parameters	Options	Contact Emp.
ADD TAX AT RECEIPT	NO	
BACKORDER PROCESSING CHECK	ON	
RECEIVE MORE THAN ORDERED	YES	

Description: Add Tax at Receipt, will determine whether the Purchase Order Line Item taxes will be included into the receiving Storeroom's total value for the Stock Code being received to calculate the Average Unit Price. If the key value is set

Receiving Parameters and Options

ADD TAX AT RECEIPT - Set this key to YES to have the system calculate the average unit price for stock items by including invoiced taxes and exchange rates. This calculation reflects the true cost of procurement of the item. When the key is set to NO taxes are not factored into the cost.

BACKORDER PROCESSING CHECK - Enable or disable checking of backordered items in the Receiving, Multi-Step Receiving, and Stock Transfer modules. Set this option to ON if you want the system to prompt the user with a listing of Checkout Requests and Work Orders that require the backordered item when other items on the Purchase Order are received.

RECEIVE MORE THAN ORDERED - This rule key controls whether or not users can receive quantities that exceed the quantity ordered on a purchase order. The setting applies to items received in the Receiving module or the Multi-Step Receiving module. If the key is set to YES (default), quantities greater than the PO item quantity can be received without any warnings or errors being displayed. If the key is set to NO, any attempt to receive quantities greater than the PO item quantity results in an error. If the key is set to RESTRICT, only authorized users can receive quantities that exceed the PO item quantity. Authorization is granted by adding the Receive More Than Ordered function to a user's responsibilities. The Contact Emp. field indicates the person who is primarily responsible for providing authorization to restricted users when needed. The list of values for this list is populated with the name of any user that has the Receive More Than Ordered function in their responsibilities. When the item is received, the system prompts the authorized user for their username and PIN to authorize the receipt.

Vendor Performance Attributes Rule (Shipment Attributes View)

Determine the attributes and associated point values used for vendor performance rating.

Quality Attribute

Enter Quality Attributes that describe the criteria that will be used to determine whether or not a vendor has delivered items or services properly. Typical examples are Packaging, Damage, Delivery, PO Compliance, and Cleanliness.

Point Value

Assign a Point Value, based on the importance of Vendor compliance, to each Attribute.

The system uses the Attributes and Point Values when calculating each Vendor's Performance Rating. The system then used the attributes and points to determine the vendor's overall performance rating.

Batch Processes

Check Received PO Item - sdbp_chk_issd_po_item;

Sends an alert to the PO Item Requestor if the PO is fully received. This procedure looks for all issued PO records. For each PO line item with the field Receipts-Fully Received = Y, an Alert will be sent to the Requestor via the home page inbox. If the Requestor is invalid or null, a message will go to the job manager. The field Sent Alert Indicator on the PO Item is set to Y after an Alert/Job Log Message is sent. The Alert will only be sent once.

Cost Accruals - sdbp_cost_accruals.cost_accruals;

Accrues costs for receiving transactions that have not yet been posted. Information is selected from the table SA_RECEIVING_LOG and posted throughout the system as required.

Invoice Resolution - sdbp_invoice-resolution;

Uses the INVOICE SETUP CRITERIA Business Rule for determining whether mismatched invoice processing is allowed, and tries to resolve mismatched invoices to PO receiving.

Vendor Performance - sdbp_vendor_performance;

Supports the gathering of Vendor Performance statistics. This procedure performs the following:

- Identifies the processing parameters for the Current Rating Period for Active Vendors.
- Updates Quality Performance data based on changes since the last batch run.
- Updates Delivery Performance data for new transactions.
- Updates Quality Performance data for new transactions.

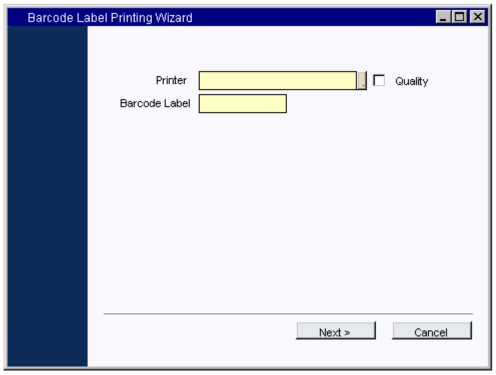
Code Tables

Code Table 57: Container Types (Length = 10)

Container field - Define codes for types of containers that shipments are typically received in. (e.g. Box, Envelope, Pallet).

Code Table 81 - Loftware Labels (Length = 15)

When a user selects Print Bar Code Labels from the Actions list in the Receiving or Multi-Step Receiving modules the screen below opens. Code Table 81 is only used if the client has purchased the Loftware Software and wants to print bar code labels. Examples: Tracking Labels, Generic Labels, Receiving Labels.



Code Table 58: NCM Disposition Codes (Shipment Attributes View) (Length = 20)

NCM Disposition field - Define codes to describe Non-Conforming Materials handling. Some examples of data are: Exchanged, Disposal, Return to Vendor, Repaired/Put on Shelf.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Accept Quality Items

Grants the ability to receive quality items in the Multi-Step Receiving module.

Bar Code Print Labels

Grants the ability to print barcode labels from the Multi-Step Receiving record.

MSR Force PO Complete

Controls whether the Force Complete action is displayed in the MSR item bin block.

Not Vendor Caused

Grants the ability to select the Not Vendor Caused action from the Multi-Step Receiving Actions list. This action prevents vendors from being penalized for a discrepant delivery.

Receive More Than Ordered

Grants the ability to receive a greater quantity than what was originally ordered on a purchase order. This functionality is also controlled by the Receiving Configuration business rule. Persons with this responsibility must also have a PIN set up.

Receive All Items As Ordered

Grants access to the Receive All as Ordered Action.

Reports

S_RPT107 - Delivery Receiving Report

Summarizes Purchase Order and Receiving information for selected Receiving sessions.

S_RPT047 - Receipt Delivery Worksheet Report

Lists information regarding items received.

S_RPT025 - Receiving Report

Lists summary Purchase Order and Receiving information for selected Receiving sessions.

S_RPT037 - Receiving Worksheet Report

Lists items to be received as well as any existing Receiving information.

S_RPT140 - Completed NCMs

Displays Non-Conforming Material (NCM) shipments that have been completed.

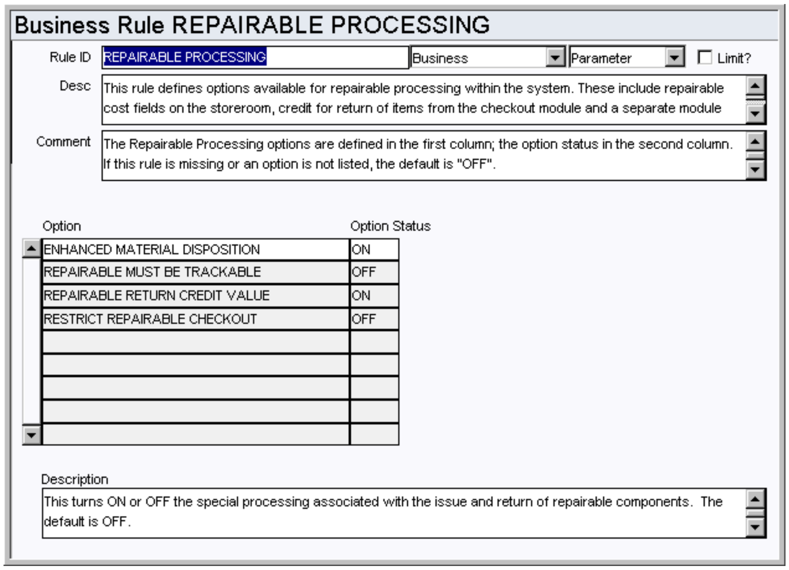
S_RPT216 - Receiving Report

Summarizes receiving records by Purchase Order number detailing items received, by whom, receipt date, and other applicable information.

Material Disposition Module

Business Rules

Repairable Processing Rule



Business Rule REPAIRABLE PROCESSING

Rule ID: REPAIRABLE PROCESSING — Business — Parameter — ☐ Limit?

Desc: This rule defines options available for repairable processing within the system. These include repairable cost fields on the storeroom, credit for return of items from the checkout module and a separate module

Comment: The Repairable Processing options are defined in the first column; the option status in the second column. If this rule is missing or an option is not listed, the default is "OFF".

Option	Option Status
ENHANCED MATERIAL DISPOSITION	ON
REPAIRABLE MUST BE TRACKABLE	OFF
REPAIRABLE RETURN CREDIT VALUE	ON
RESTRICT REPAIRABLE CHECKOUT	OFF

Description: This turns ON or OFF the special processing associated with the issue and return of repairable components. The default is OFF.

Define options available for repairable processing within the system. These include repairable cost fields on the storeroom, credit for return of items from the checkout module and a separate module for disposition of repairables.

If this rule is missing or an option is not listed, the default is “OFF”.

Option and Option Status

ENHANCED MATERIAL DISPOSITION - This turns ON or OFF the special processing associated with the issue and return of repairable components. The default is OFF.

REPAIRABLE MUST BE TRACKABLE - This turns ON or OFF the storeroom validation that a storeroom item CANNOT be repairable unless it is also trackable. The default is OFF.

REPAIRABLE RETURN CREDIT VALUE - This turns ON or OFF the special processing associated with the return of repairable components that are returned USED, but receive a credit and are NOT considered in the on-hand quantity. The default is OFF.

RESTRICT REPAIRABLE CHECKOUT - If this key is set to ON, stock items marked as Repairable can only be checked out against work orders.

When the Enhanced Material Disposition key is set to ON, the Restrict Repairable Checkout key must also be set to ON.

Code Tables

Code Table 59: Material Disposition Repair Types (Length = 10)

Repair Type field - Define classification codes for repairs. This code table can be used in several different ways. Typical examples are: to classify types of repairs or identify who is doing the repair work (e.g. internal or external labor).

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Repair Removed Part

Grants the ability to use the Repair Removed Part Action from the Work Order Task module Actions list to create a Material Disposition record.

Batch Processes

Storeroom Repair Costs - sdbp_storeroom_repair_costs;

Sums costs based on the material and account log for material that has been dispositioned from closed work orders.

Managing Advanced Materials

The Material Disposition process was enhanced to allow the tracking of repair costs for non-component Inventory type stock codes that have the Repairable indicator set to "Y" at the storeroom in which the stock code exists in Active status:

Set Up for Advanced Materials Processing Functionality

Repairable Processing Business Rule

The functionality behind this option in the Business Rule was modified in version 5.2 to allow non trackable, but repairable stock items to be included in the Repair Process.

ENHANCED MATERIAL DISPOSITIONSet to ON

REPAIRABLE RETURN CREDIT VALUESet to OFF

REPAIRABLE MUST BE TRACKABLESet to OFF

Component Processing Business Rule

This Business Rule is defaulted to Yes and can only be set to No if the Repairable Processing Business Rule Option ENHANCED MATERIAL DISPOSITION is set to ON. If the INSTALL AT ISSUE option is set to NO, the Material Disposition item will have the initial status of Pending Disposition when issued from the Checkout module. To set the material Disposition status to Installed , you must use the Material Disposition module.

REPAIRABLE RETURN CREDIT VALUESet to No

INSTALL AT ISSUE - Set to No

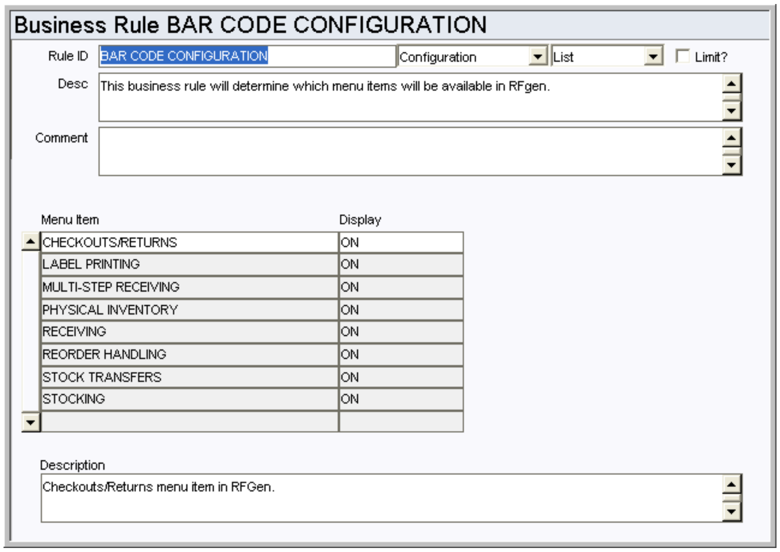
See Component Processing Business Rule for remaining options.

Physical Inventory Module

Manage inventory counts and adjust quantities as required in the Physical Inventory module.

Business Rules

Bar Code Configuration Rule



Business Rule BAR CODE CONFIGURATION

Rule ID: BAR CODE CONFIGURATION | Configuration | List | ☐ Limit?

Desc: This business rule will determine which menu items will be available in RFgen.

Comment:

Menu Item	Display
CHECKOUTS/RETURNS	ON
LABEL PRINTING	ON
MULTI-STEP RECEIVING	ON
PHYSICAL INVENTORY	ON
RECEIVING	ON
REORDER HANDLING	ON
STOCK TRANSFERS	ON
STOCKING	ON

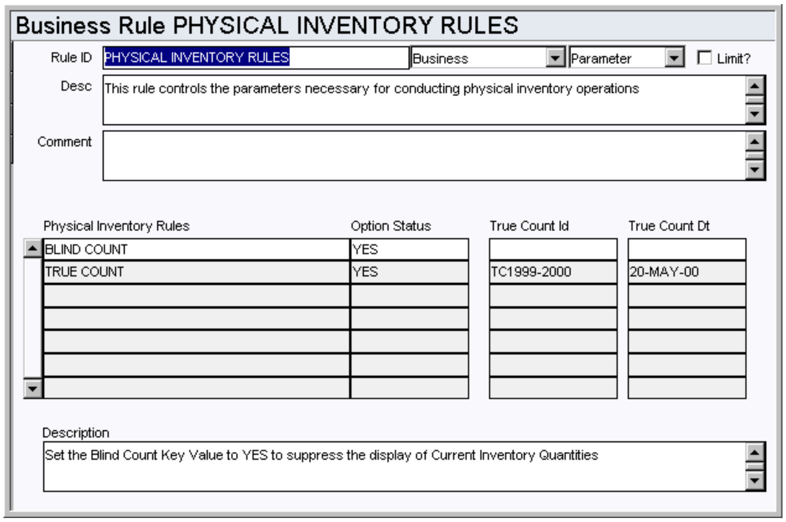
Description: Checkouts/Returns menu item in RFGen.

This rule determines the main menu options available in the RFGen Bar Coding application.

Menu Item and Display

Options set to ON appear on the bar coding main menu.

Physical Inventory Rules Rule



Business Rule PHYSICAL INVENTORY RULES

Rule ID: PHYSICAL INVENTORY RULES | Business | Parameter | ☐ Limit?

Desc: This rule controls the parameters necessary for conducting physical inventory operations

Comment:

Physical Inventory Rules	Option Status	True Count Id	True Count Dt
BLIND COUNT	YES		
TRUE COUNT	YES	TC1999-2000	20-MAY-00

Description: Set the Blind Count Key Value to YES to suppress the display of Current Inventory Quantities

Determine the method of performing Physical Inventory counts used by the system. This Business Rule allows you to select between a standard inventory count and a blind count. The difference involves whether the user is allowed to see the current storeroom's on-hand quantity prior to performing the physical inventory.

Physical Inventory Rule, Option Status, True Count ID, True Count DT

BLIND COUNT - Determines whether or not the Physical Inventory Report should suppress the current inventory quantities.

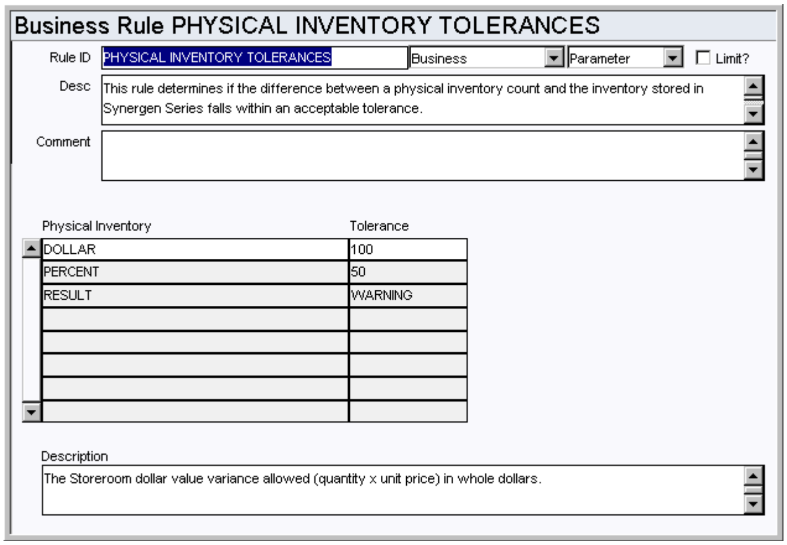
To perform an inventory count without knowing the system's on-hand quantity, set the OPTION STATUS rule key to YES. Physical Inventory Reports produced for the counters will not contain the system's on-hand quantity for each stock item listed.

To perform standard inventory counts, set the OPTION STATUS rule key to NO. Physical Inventory Reports produced for the counters will contain the system's on-hand quantity for each stock item listed.

This applies to reports S_RPT038, S_RPT104 and S_RPT108.

TRUE COUNT - This rule is only for use with the Advanced Material Management Option.

Physical Inventory Tolerances Rule



Business Rule PHYSICAL INVENTORY TOLERANCES

Rule ID: PHYSICAL INVENTORY TOLERANCES | Business | Parameter | ☐ Limit?

Desc: This rule determines if the difference between a physical inventory count and the inventory stored in Synergen Series falls within an acceptable tolerance.

Comment:

Physical Inventory	Tolerance
DOLLAR	100
PERCENT	50
RESULT	WARNING

Description: The Storeroom dollar value variance allowed (quantity x unit price) in whole dollars.

Determine the dollar and percent tolerances for discrepant inventory counts. When performing a Physical Inventory count, if the counted number of items is different than the inventory quantity currently stored in the system, the system checks this rule to determine if the difference falls within an acceptable dollar and percent tolerance. If a tolerance level is exceeded, the user is prompted, inquiring if a recount is necessary or if the entered value should be accepted.

Physical Inventory and Tolerance

DOLLAR - The storeroom dollar value variance allowed (QUANTITY x UNIT PRICE) in whole dollars.

PERCENT - The percent variance allowed between storeroom dollars value and count value (QUANTITY x UNIT PRICE).

RESULT - Stop and Warning.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Adjust Store for Recount

Grants the ability to use the Stores Quantity Wizard from the Physical Inventory Search Options or Search Results screen to process storeroom recounts.

Reports

S_RPT038 - Physical Inventory Listing Report

Lists physical inventories generated sorted by inventory number.

S_RPT039 - Physical Inventory Variance Report

Lists Stock items where the quantity counted is different than the quantity On Hand Quantity maintained within the system. Transactions that took place between the time that the list was first generated and when the count was entered into the system are taken into consideration.

S_RPT104 - Physical Inventory Listing Report

Lists Stock items to be counted as generated from a Physical Inventory. Please see the PHYSICAL INVENTORY Business Rule for more information regarding this report.

S_RPT108 - Inspection/Discrepancy Physical Inventory Report

Lists physical inventories generated sorted by inventory number.

S_RPT109 - Property Inventory - Items Not Found Report

Provides a listing of items not found during an inventory to support physical inventory of property module.

Shipping Memo Module

The Shipping Memo module allows users to manage shipment of materials to outside contractors (Vendors) and account for the return of those items. Typical types of Shipping Memo's are Returns for Credit, Rental Returns, Over shipment, and Miscellaneous Shipments.

Fields

Sequence No.: Shipping Memo No.

The record number is comprised of a unique ID (Ex. “0100000003”). Shipping Memo record numbers must be system generated. Manual creation of these record numbers could result in critical system errors when records are created from other records or in batch procedures.

TABLE NAME - SA_SHIPPING_MEMO - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

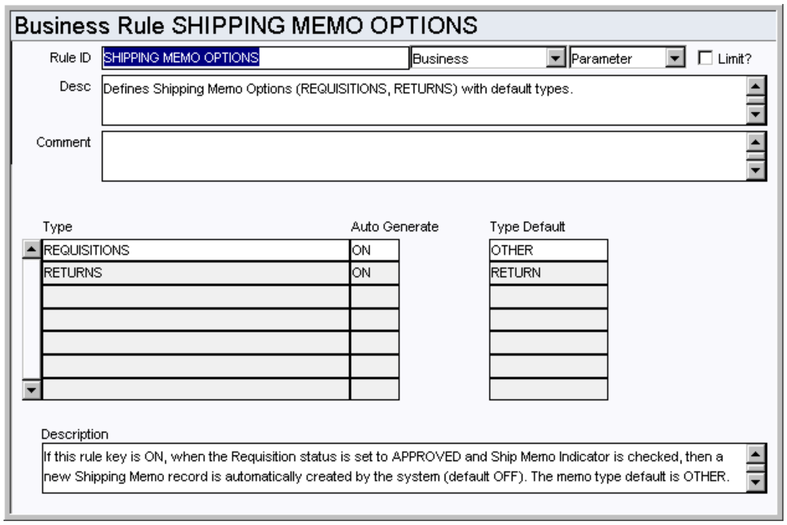
System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Business Rules

Shipping Memo Options Rule

Determine whether Shipping Memo records are automatically created from a Requisition and through Receiving or Multi Step Receiving for credit or replacement.



Business Rule SHIPPING MEMO OPTIONS

Rule ID: SHIPPING MEMO OPTIONS — Business — Parameter — ☐ Limit?

Desc: Defines Shipping Memo Options (REQUISITIONS, RETURNS) with default types.

Comment:

Type	Auto Generate	Type Default
REQUISITIONS	ON	OTHER
RETURNS	ON	RETURN

Description: If this rule key is ON, when the Requisition status is set to APPROVED and Ship Memo Indicator is checked, then a new Shipping Memo record is automatically created by the system (default OFF). The memo type default is OTHER.

Type, Auto Generate, and Type Default

REQUISITIONS - If this rule key is ON, when the Requisition status is set to APPROVED and Ship Memo Indicator is checked, then a new Shipping Memo record is automatically created by the system (default OFF). The memo type default is OTHER.

RETURNS - When this rule key is ON, when Purchase of Direct and Stores items are returned, a new Shipping Memo record is automatically created by the system (default OFF). The memo type default is RETURN.

Copy Record

SHIPMEMO - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reports

S_RPT210 - Shipping Memo Report

Summarizes Shipping Memo details for reports selected.

Property Management Module

Fields

Sequence No.: Property ID

The record number is comprised of a unique ID. Typically this is user entered.

TABLE NAME - SA_PROPERTY - The sequence number is generated for this database table.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Code Tables

Code Table 53: Property Types (Length = 20)

Type field - Define codes for categories or types of equipment that you want to track by employee. This table is attached to the Type field on the Property module header screen. Some examples of data are: Capital Office (In-Focus, Projectors, Laptops), Car, Communication (Cell Phones, Pagers, Radios)

Code Table 55: Property Classes (Length = 20)

Class field - Define codes to classify or scale different types of property items you want to track by employee. Some examples of data are: High, Low, Medium.

Copy Record

PROPERTY - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Reports

S_RPT110 - Property Inventory - Discrepancies Report

Shows all Property Inventory records with Discrepancies.

S_RPT111 - Property Inventory - Items to be Inventoried Report

Lists items to be inventoried based on the property inventory list created through the Property Inventory module.

S_RPT109 - Property Inventory Report - Items Not Found

Lists items not found during an inventory to support physical inventory of property module.

Consumables Module

Code Tables

Code Table 31: Consumable Types (Length = 6)

Types column - Define codes to identify the type of consumable that is being used. Typical entries include 'Antif' (Antifreeze), 'Oil', 'Ulead' (Unleaded), etc. Note that the maximum data length for this field is set to 6 characters. Identifying Consumable types facilitates searches by allowing queries to be conducted at a high level.

Code Table 32: Consumables Source Codes (Length = 8)

Source column - Define codes to identify the origin of the consumable. Typical entries might be a service station, a garage, etc. Identifying Consumable Source codes facilitates searches by allowing queries to be conducted at a high level.

Chapter 7

Customer Subsystem

Customer Module

Fields

Sequence No.: Customer ID
The record number is comprised of a unique ID (Ex. “0000023”). Customer record numbers are typically set to be system generated.

Table Name - SA_CUSTOMER - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

Please refer to Sequence Numbers Module for more information and examples.

Copy Record

CUSTOMER - COPY RECORD
Add this to users’ responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Code Tables

Code Table 15: Country Codes
Country Code field - Populate this table with a listing of all Countries that are applicable to your organization. This is a system code table.

Code Table 73: Property Types (Address (Detail) View)
Property Type field - Define codes to identify whether or not the customer is a owner, renter, or holds a lease on the property that is serviced. Examples of data are: Lease, Owner, Renter.

Note: Do not confuse this code table with Code Table 53 which is also called Property Type and relates to the Property Management module.

Service Request Module

Fields

Sequence No.: Service Request No.

The record number is comprised of a unique ID (Ex. “0100005”). Service Request record numbers are typically set to be system generated.

TABLE NAME - SA_SERVICE_REQUEST - The database table that the sequence number is generated for.

Sequence Number, Prefix, and Length - If the system generates the number, you can determine if there is a starting number, what that number should be, and specify a prefix if needed. The length indicates the maximum number of characters that can be used in the number.

System - A check in the System check box indicates that the sequence number should be system generated.

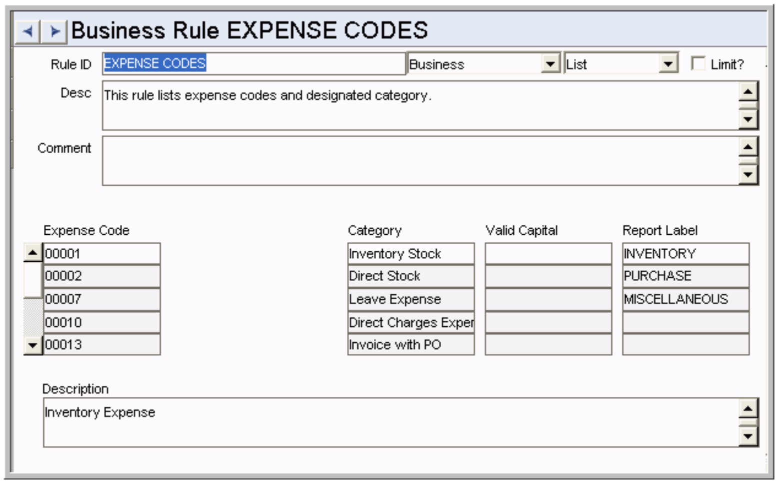
Please refer to Sequence Numbers Module for more information and examples.

Next Approver Field

Designate approvers for Service Request records in the Approval Limits module of the Administration subsystem under Approvals and Routes.

Business Rules

Expense Codes Rule



Rule ID: EXPENSE CODES | Business | List | ☐ Limit?

Desc: This rule lists expense codes and designated category.

Comment:

Expense Code	Category	Valid Capital	Report Label
00001	Inventory Stock		INVENTORY
00002	Direct Stock		PURCHASE
00007	Leave Expense		MISCELLANEOUS
00010	Direct Charges Exper		
00013	Invoice with PO		

Description: Inventory Expense

List expense codes and a category for each (such as regular labor, premium labor, stock purchases, direct purchases, etc.).

Expense Code and Category

Enter the valid code (used for accounting) in the EXPENSE CODE column. For each listed code, you can then enter the appropriate category into the CATEGORY column. These codes are used to summarize and categorize costs.

Note: Expense Codes are used with Account numbers to set up budgets for an entity.

CCB Expense

If your organization uses CCB Integration the CCB Expense column defines categories that are used to summarize costs when they are sent to Oracle Utilities Customer Care and Billing from Oracle Utilities Work and Asset Management on the completion of a service request. these codes should correspond to a Characteristic Type in Oracle Utilities Customer Care and Billing. The list of values for this field is defined in code table 1195 - CCB Expense.

Valid Capital

The Valid Capital column is designated for a custom configuration and is not used.

Code Tables

Code Table 240: Service Request Types

Type field - Define codes to identify service request types. Typical entries might be Maintenance, Install, Water, Wastewater, Pipes, or Transmission Line.

Code Table 241: Problem Codes

Problem Code field - Define codes to identify types of problems that could initiate a Service Request. Typical entries might be broken meter, flood, valve, and water main break.

Code Table 242: Deposit and Payment Types (Billing Information View)

Type fields - Define codes to identify ways in which deposits or payments can be made. Some examples of data are: Cash, Check, Money Order, Credit.'

Code Table 246: Disconnect Location

Disconnect Location field - Define codes used on the field in the Service Request module Meter Information view.

Code Table 1195 - CCB Expense

If your organization uses CCB Integration, use this table to define codes to use with the Expense Codes business rule.

Code Table 1196 - CCB Install Remove Flag

If your organization uses CCB Integration, use this table to define flag codes.

Copy Record

SERVREQ - COPY RECORD

Add this to users' responsibilities to allow them to copy a record, including header and details, in this module. To display the Copy Record action on the Actions list users must have both the Responsibility and at least one table configured for the module. Please refer to Modules Administration - Forms Module Copy Record View for more information.

Functions

Add functions to responsibilities to allow users to perform tasks within the system. In most cases, if the function is not enabled, the system will not display the related view or action. The following activities are available when the Ind check box is checked for each function. Please refer to Responsibility Module Responsibility Types for more information.

Associated Service Request
Grants access to the action that creates an associated service request.

Create WO from Service Request
Allows users to change a Service Request status to work order or to select Create Follow-up Work Order from the Service Request Actions list.

Batch Processes

Cost Service Request - sdbp_cost_service_request.cost_service_request_rollup

Posts closed service request assets to the cost asset table.

Charts

S_CHT140 - Customer Follow-Up Calls

The number of Service Request follow-up calls made during the current year and the previous year. The data can be filtered further by Plant, Service Request Type and Problem Code.

Metrics

S_MTRC1 - Customer Follow-Up Calls Pending - sdbp_metric_cust_follow_calls

This metric is a count of the total number of Service Requests that are "Ready for Callback." It provides a means to monitor and improve the efficiency of customer response time.

Reports

S_RPT138 - Service Request Report

Provides a summary of each Service Request selected including work location information, customer information, reported by, and call history.

Chapter 8

Enterprise Subsystem

Executives can view cost enterprise-wide summaries spanning several plants and other organizational units in the Enterprise subsystem. Enterprise data can be used to compare maintenance and inventory costs between different divisions and to locate assets and inventory in other organizational units.

Within the Enterprise subsystem, two additional corporate levels can be identified above Plant. Company is the highest level and can consist of a number of Organizations. Organizations are the second level and can consist of a number of Plants. For each Company, at least one Organization and one Plant must be defined.

Just as Period Cost and Cost Summary information rolls up from Asset to Area to Department within a Plant, Plant Period Cost and Cost Summary information is aggregated at the Company and Organizational levels.

Asset Type Analysis Module

The Asset Type Analysis module provides cost summaries by Asset type for the entire Enterprise and by Plant.

This module is only used to review information, therefore there are no configurable items.

Company Module

Other than establishing Company records, there are no configurable items in this module. The Company ID and description fields are both free form fields where you can define the Company.

Enterprise Asset Module

The Enterprise Asset module is identical to the Asset module in the Resource subsystem, with the addition of Plant as a searchable field. You can search for assets across all plants in your company, or in a particular plant. If you search on some criteria other than plant, you can review the search results to see which plants hold identical or similar assets.

Since this is a replica, all items should be addressed during configuration of the Asset module.

Code Table 75 - 77: Asset Mobile fields 1-3

Asset Code fields - Define codes to use to filter assets when they are downloaded on a PDA.

Enterprise Catalog Module

The Enterprise Catalog module is identical to the Master Catalog module in the Resource subsystem, with the addition of Plant information on the storeroom summary views.

While you cannot search the Enterprise Catalog module directly for stock items at a particular Plant, you can review the Storeroom Quantity Summary to see what quantities of the item are held in the various Plants identified with your enterprise. Similarly, you can review the Storeroom Reorder Summary to see usage and reordering information from the various Plants.

Since this is a replica, all items should be addressed during configuration of the Master Catalog module.

Organization Module

The second highest level of the enterprise hierarchy is defined in the Organization module. The Organization level can be used for divisions, subsidiaries, brand families, or other grouping that is logical to your enterprise structure.

Once the appropriate organization records have been created and saved, both Company and Organization can be referenced from Plant records.

Other than setting Organization records as children to Company records, there are no configurable items in this module.

Plant Module

Use the Plant module to record and organize information regarding your organization's various work sites.

Fields

Plant

Each plant must have a unique number.

Description

The Description field contains a brief description of the plant.

Company

Select the Company the Plant is identified with from the List of Values. Before a Company can be entered, a corresponding record must exist in the Company module.

Organization

Select the Organization the Plant is identified with from the List of Values. Before an Organization can be entered, a corresponding record must exist in the Organization module for the Company selected.

Locale

The locale field allows you to set the plant location and local language used. These settings affect aspects of the system such using postal codes rather than zip codes or whether the English or Metric system is used in measurements.

Local Currency and Fiscal Calendar

The Local Currency field is used to establish the default currency code to use on your procurement documents. Currency Codes are defined in the Currency Exchange Rates module of the Administration subsystem.

Together these fields are for use with Business Intelligence functionality. If your organization uses Business Intelligence, these fields must be populated as triggers for extracting data from Oracle Utilities Work and Asset Management to Business Intelligence. Please see your product representative for more information.

Locale Phone Format

The Locale Phone Format field allows you to set the appropriate formatting for phone number fields. Users enter digits into a phone number field on another record and the system automatically formats the number according to the format set here. This formatting also applies to where phone numbers appear on reports. Select NO FORMATTING to allow free form entry of numbers in any format.

> If one phone format is chosen and data is entered, then the format is changed here, the system does not re-format existing data. Please use care and forethought in choosing a phone format. Most US clients will not want to adjust this field from the default.

Include in Run All Batch?

A check in the Include in Run All Batch? check box indicates that the plant will be included in Run All Batch processing. This is important when multiple plants share the same database. If a plant is excluded from Run All Batch processing, each relevant batch process must be run individually for that plant.

Multi-Plant/ Single Plant Usage

The system provides two options for separation of data in the database, the use of multiple Plants or the use of a single Plant with the use of departmental data to separate data. These two configurations offer very different results for customers.

Using Multiple Plants

You only use a Multiple Plant deployment when you want one database instance supporting multiple, separate, discreet deployments of Oracle Utilities Work and Asset Management. This means that everything is duplicated and identified by a Plant column. There is no need for common procurement, common inventory, there is no need for common lookup tables, it is as though there are multiple deployments.

This provides a single database instance and set of application software to be maintained by IT for ALL of your Oracle Utilities Work and Asset Management information so that the IT responsibilities are reduced.

This feature allows you to implement a single database instance to support many versions of the application. This allows your maintenance costs to be greatly reduced having to only support one database from an IT infrastructure perspective. However, the application is structured to keep the information about different plants separated just as though the data was actually stored in difference database instances. Some provisions are made allowing you to search across the various Plants in areas such as Inventory and Assets, but these areas are limited and not pervasive throughout the application. Centralized Inventory or Purchasing is not one of the functions that can easily be implemented in this configuration.

When to Use Multiple Plants

There is a simple question to ask yourself that clarifies the use of a multiple plant deployment.

> *Would it be correct to deploy the Oracle Utilities Work and Asset Management application to different users in separate database instances on different database servers?*

This implies that the multiple deployments would be separate and discreet with no overlap. If you want to search across the instances you would have to bring the data together in a common data warehouse.

There are cases for customers where this makes sense. For example, customers that sell their services to cities and want the deployments at each city to be separate and configured specific for each city. There are no common procurement or codes, so each deployment is unique.

If you answer Yes to this question, then a multiple plant deployment makes sense for the customer and would allow you to implement Oracle Utilities Work and Asset Management in a single database instance on a centralized server.

Separating Data in Oracle Utilities Work and Asset Management

What is often confused with the use of multiple plants is the desire to separate data so that one group of users "do not see" or "can not see" another group of users information. This is common among municipalities that have Water, Waste Water, PW, and Parks & Recreation departments. This is an entirely different question and a multi-plant deployment does not solve this issue.

There are other Oracle Utilities Work and Asset Management features that help meet this request like Fine Grain Access which allows for Virtual Private Databases. There are also many configuration features that allow you to default search criteria that keep users in a specific "funnel" of data by default but that allow you to search across departments when necessary.

Single Plant - Multiple Departments

This configuration allows you to implement a centralized inventory and/or purchasing process that can support the various departments. This basic configuration of the application should not require any unique software to be developed. The application is designed to provide real-time integration between the various work management departments, inventory management and purchasing. However, there are often concerns about creating a centralized open view of information in an application such as this one. If your organization has various departments that may have different ways of doing business and may be concerned about having to "live by" another departments business rules. For example, a Parks department may not have the same processes in place as a Wastewater Treatment Plant and those departments may be different than a Fleet operation. We have found that there are often many similarities in the way work is managed in various departments and for the most part there are few conflicts. In the few places where business practices may differ, the Oracle Utilities Work and Asset Management team works with the departments to develop a solution that works for each department. We provide a variety of ways to allow you to configure the application to meet these special requirements.

Additional Considerations

Some of the issues that arise when we work though a multiple departmental installations, include:

- Business Rule Settings - What if they need to be different for the different departments?
- Asset Hierarchy - Do the various departments have to have the same Asset structures?
- Data Availability - Can each department see each others information?

Business Rules

The business rules, are by default, common to each user in the single plant configuration. We have found that the rules are often easily agreed upon by the various departments and are also often departmentally exclusive. For example, setting a business rule in the fleet work order system will not affect the work order processing for the plant.

Asset Hierarchy

The asset hierarchy is a valuable feature that is very useful to our customers. Since this feature is a data model and not a process built into the application, you are not required to have the same hierarchy for each department.

Data Availability

This concept is related to the viewing of information within modules. The base security within the system is related to the module. Users are given responsibilities to select, insert, update, or delete records in modules. For example, if you have access to view work orders, you are able to view all work orders in all departments. This is sometimes viewed as a problem by departments, in the form of the Parks department does not want Communications to see their work orders. If this issue arises, there are several system features that you can use to help ease concerns.

One useful feature is the ability to set up defaults on search options screens to allow configuration of “vertical data segments” within a module. For example, you may set up a user to default the department PARKS on each search options screen. This default is saved as part of the user profile and remembered each time you enter the module. This has the affect of keeping a user in a segment of data within a module by default. The user is able to override the defaults, but would have to consciously modify his or her settings to see data from other departmentalize setting search defaults is not sufficient and there is a need to more formally secure the data within a module, the system also includes a feature called Fine Grain Access (FGA). FGA utilizes a database concept called “virtual private databases” allowing you to set security on a set of data within a module or table. Each user can be included or excluded from viewing specific records in each module. FGA relies on a database construct called a “database policy”. Access to the rows in the table is controlled at the database level, not by the application. This means that the “database policy” keeps data hidden from the user regardless of how the table is being accessed. The default access may certainly be through the module, but if the user were to run a report or use a third party tool, where they log on as the same user, the data will remain “hidden” to them.

If fine grain access is used, you will not be able to view data across departments, even in search mode, unless you create a second user with access to this data, and then sign on as the new user. This feature also requires that the Oracle database be Oracle Enterprise Edition. Database Policies are not available in Oracle RDBMS Standard Edition.

Index

A

ABC Inventory Business Rule
  Storeroom Setup Module 160
Account Creation from Projects Business Rule
  Project Module 328
Account Distribution Template Module 149
Account Module 143
Account Period Override Rule
  Accounting Periods Module 138
Account Rules (Custom) 78
Account Structure Module 136
Accounting Periods Module 138
Activities Requiring an Approval Title
  Approved Vendor Override 72
  Discrepancy Activity 72
  Discrepancy Owner 72
  Inspection Owner 72
  Material Planner 72
  Physical Inventory Wizard 72
  Timesheet Wizard 72
Activity Tracking Module 287
Actual Cost to Planning Estimate 263
Advanced Materials Management Option (AMMO) 82, 89
Alerts
  Approval Alerts 73
  Auto Stock Reorder 440
  Backordered Items Arrived 255, 373, 381, 424, 436, 444, 450
  Budget Overage 145
  Default E-Mail Address For 42
  Issue Qty. Exceeds WO Estimate 43, 433
  Multiple Blanket Contract Revisions 396
  Out of Range Asset Data 186
  Parts Arrived 255, 373, 381, 424, 436, 444, 450
  PO Fully Received 389
  PO Item Received .. 255, 373, 381, 424, 436, 444, 450
  Project Exceeds % Tolerance 329
  Project Exceeds Budget Tolerance 329
  System-Wide Settings 43
Alerts Business Rule
  Checkout Request Module 424
  Multi-Step Receiving Module 450
  Purchase Order Module 381
  Receiving Module 444
  Requisition Module 373
  Stock Transfer Module 436
  Work Order Module 255
Allow Duplicate View
  Modules Administration - Forms Modules 105
Ammo Related Business Rules 82
AMMO Related Code Tables 89
Analysis Views Access List (Custom) 78
AP Batch Interface (Custom) 78
AP Batch Interface Business Rule (Custom) 78
Approval Limit Module 71
Approval Route 73
Approval Route Field
  subproject module 327
Approval Routing Business Rule
  Routing List Module 73
Approvals 71
  Approval Route Field
    asset module 167
    change order module 393
    direct charges module 344
    invoicing module 403
    permit module 307
    project module 327
    purchase order module 380
    requisition module 372
    work design module 249
    work request module 239
  Modules Requiring Approval Title 72
  Next Approver Field
    change request module 204
    cost adjustment module 415
    request for quotes module 399

    - service request module 467
    - timekeeping module 351
  - Special Considerations
    - account default 143
    - approval types 86
    - approve all timesheets 361
    - auto approve change orders 393
    - auto invoice approver 155
    - blanket contract approvers 397
    - process defaults 235
    - project/subproject defaults 329
    - purchase order 84
    - receiving 446
    - reorder review 440
    - resend approval request 378
    - route timesheets for approval 362
    - timekeeping authority 355
    - work request defaults 245
- Approved 329
- Area Module 142
- Asset Activity Log Module 177
- Asset Class Module 179
- Asset Data Module 187
- Asset Depreciation Accounts View
  - Asset Module 175
- Asset Depreciation Business Rule
  - Asset Class Module 179
  - Asset Module 170
  - Fleet Asset Module 289
- Asset Inspection Data Module 184
- Asset Interfaces View
  - Asset Module 175
- Asset Key Segments Business Rule
  - Asset Module 171
  - Fleet Asset Module 290
- Asset Module 167
- Asset Navigator Business Rule
  - Home Page 37
- Asset Runtime Rule
  - Asset Module 168
  - Runtime Entry Module 335
- Asset Type Analysis Module 470
- Assigned Users View 93
- Associate Permit Requirements View
  - Asset Module 175
- Attachment Drive Mapping Business Rule
  - Attachment Modules 214
  - Purchase Order Module 395
- Attachment Print Configuration Business Rule
  - Attachment Modules 213
- Attachment Printing Business Rule
  - Permits Module 309
- Attachment Types Business Rule
  - Attachment Modules 214
- Audit Log
  - Transaction Logs 51
- Auto Generate Daily Schedule Business Rule
  - Crew Module 283
  - Daily Schedule Module 336
- Auto Generate Weekly Schedule Business Rule
  - Workweek Schedule Module 340
- Available Quantity Calculation Business Rule
  - Storeroom Module 153

B

- Backorder 255, 373, 381, 388, 424, 436, 444, 451
- Bar Code Configuration Business Rule
  - Checkout Request Module 425
  - Multi-Step Receiving Module 451
  - Physical Inventory Module 458
  - Receiving Module 445
  - Stock Transfer Module 436, 437
  - Storeroom Stocking Module 439
- Barcode Label Printers Business Rule
  - Multi-Step Receiving Module 452
  - Receiving Module 445
- Barcode Label Printers Business Rule (Obsolete) 82
- Barcoding Checkout Business Rule
  - Stock Checkout Module 432
- Batch Job Control Business Rule (General) 61
- Batch Job Control Processes
  - sdbp_auto_create_timesheet.main 64
  - sdbp_blanket_services.auto_activate 64
  - sdbp_blanket_services.auto_close 64
  - sdbp_check_lot_expiration 64
  - sdbp_check_pick_queue 64
  - sdbp_chk_issd_po_item 64
  - sdbp_clean_user_n_user_profile 68
  - sdbp_close_work_orders.close_work_orders 64
  - sdbp_cost_accruals.cost_accruals 64
  - sdbp_cost_adjustment 64
  - sdbp_cost_asset.cost_asset 65
  - sdbp_cost_invoice.cost_invoice 65
  - sdbp_cost_labor.cost_labor 65
  - sdbp_cost_service_invoice.cost_service_invoice 65
  - sdbp_cost_service_request.cost_service_request_rollup 65
  - sdbp_cost_stock.cost_stock 65
  - sdbp_create_bom_details.create_bom_details 65
  - sdbp_default_accounts_status 64

  - sdbp_direct_charges.direct_charges 65
  - sdbp_end_period_depreciation 65
  - sdbp_event_queue.clear_events 64
  - sdbp_finish_wo 65
  - sdbp_generate_all_chart_images 66
  - sdbp_held_for_parts 66
  - sdbp_invoice_resolution.resolve_invoices 66
  - sdbp_metric_handler 66
  - sdbp_pay_voucher.pay_voucher 66
  - sdbp_pm_cycle_job.start_job 66
  - sdbp_pm_finish 66
  - sdbp_pm_routing 66
  - sdbp_po_closeout 66
  - sdbp_post_leave 66
  - sdbp_post_timesheets.post_time 66
  - sdbp_process_service_timesheet.accumulate_posted 64
  - sdbp_process_service_timesheet.post_approved_time 67
  - sdbp_process_warranty_alerts 68
  - sdbp_project_alert.alert_job 67
  - sdbp_purge_data 67
  - sdbp_purge_requisitions.purge_req 67
  - sdbp_purge_work_order.purge_wo 67
  - sdbp_purge_work_requests.purge_wr 67
  - sdbp_regulatory_account_cost 67
  - sdbp_reschedule.job_reschedule 67
  - sdbp_stock_reorder.stock_reorder 68
  - sdbp_storeroom_demand 67
  - sdbp_storeroom_on_order 68
  - sdbp_update_tmpl_status 68
  - sdbp_vendor_performance.vendor_performance 68
  - sdbp_work_order.fixed_asset 66, 67
  - sdbp_year_end_oh_cost_dist 68
  - smu_interface.sdbp_mu_interface 64
- Batch Processes 64
  - debugging 70
- Batch Processes (by procedure)
  - sdbp_auto_create_timesheet.main 64, 211
  - sdbp_blanket_services.auto_activate 64
  - sdbp_blanket_services.auto_close 64
  - sdbp_check_lot_expiration 64
  - sdbp_check_pick_queue 64
  - sdbp_chk_issd_po_item 64
  - sdbp_clean_user_n_user_profile 68
  - sdbp_close_work_orders.close_work_orders 64
  - sdbp_cost_accruals.cost_accruals 64
  - sdbp_cost_adjustment 64
  - sdbp_cost_asset.cost_asset 65, 174
  - sdbp_cost_invoice.cost_invoice 65, 157
  - sdbp_cost_labor.cost_labor 65
  - sdbp_cost_route.cost_route 69
  - sdbp_cost_service_invoice.cost_service_invoice 65
  - sdbp_cost_service_request.cost_service_request_rollup 65
  - sdbp_cost_stock.cost_stock 65, 157
  - sdbp_create_bom_details.create_bom_details 65, 165, 174, 203
  - sdbp_create_change_req.create_chaange_from_wo 206
  - sdbp_create_new_leave_year.new_leave_year 69
  - sdbp_default_accounts_status 64
  - sdbp_direct_charges.direct_charges 65
  - sdbp_end_of_period_processing 69, 157
  - sdbp_end_period_depreciation 65, 174, 293
  - sdbp_ers_invoicing 69
  - sdbp_event_queue.clear_events 64
  - sdbp_finish_wo 65
  - sdbp_generate_all_chart_images 66, 112
  - sdbp_generate_chart_image 69, 112
  - sdbp_held_for_parts 66
  - sdbp_invoice_resolution.resolve_invoices 66
  - sdbp_job_error_log 69
  - sdbp_materialized_view 36
  - sdbp_metric_handler 66, 112
  - sdbp_metric_pct_plan_outage 174
  - sdbp_pay_voucher.pay_voucher 66
  - sdbp_pm_cycle_job.start_job 66
  - sdbp_pm_finish 66
  - sdbp_pm_routing 66
  - sdbp_po_closeout 66
  - sdbp_post_leave 66
  - sdbp_post_timesheets.post_time 66
  - sdbp_process_service_timesheet.accumulate_posted 64
  - sdbp_process_service_timesheet.post_approved_time 67
  - sdbp_process_warranty_alerts 68
  - sdbp_project_alert.alert_job 67
  - sdbp_purge_data 60
  - sdbp_purge_requisitions.purge_req 67
  - sdbp_purge_work_order.purge_wo 67
  - sdbp_purge_work_requests.purge_wr 67
  - sdbp_regulatory_account_cost 67, 152
  - sdbp_req_template_status_chk 69
  - sdbp_reschedule.job_reschedule 67
  - sdbp_run_all_batch 60, 69
  - sdbp_stock_reorder.stock_reorder 68, 158
  - sdbp_storeroom_demand 67, 157, 158
  - sdbp_storeroom_on_order 68, 158
  - sdbp_storeroom_repair_costs 69, 158

- sdbp_update_tmpl_status 68
- sdbp_vendor_performance 68
- sdbp_work_order.fixed_asset 66, 67, 152
- sdbp_year_end_oh_cost_dist 68, 152
- smu_interface.sdbp_mu_interface 64

Batch Processes (by process name)
- Account Distribution Template 64
- Accumulate Posted Service Invoices 64
- Accumulate Posted Service Timesheets 421
- Asset Cost Allocation 416
- Asset Depreciation 65, 174, 293
- Auto Activate Blankets 64, 398
- Auto Close Blankets 64, 398
- Auto Create Timesheets 64, 211
- Auto Invoicing 410
- Automatic Invoicing 69
- Check Lot Expiration 64
- Check Pick Queue 64
- Check Received PO Item 64, 389, 448, 453
- Clear Event Queue 64
- Close Work Order 64, 260
- Cost Accruals 64, 448, 453
- Cost Adjustment 64, 416
- Cost Adjustment for PM Route 69, 278, 325, 416
- Cost and Closeout 64, 279, 346, 362
- Cost Asset 65, 174, 278
- Cost Invoice 65, 157, 410
- Cost Labor 65, 279
- Cost Service Invoice 65
- Cost Service Invoice (by process name) 421
- Cost Service Request 65, 469
- Cost Stock 65, 157
- Create BOM Details 65, 165, 174, 203
- Create Change Request 279
- Create New Leave Year 69, 349
- Direct Charges 65, 345
- End of Period Processing 69, 157
- End Period Depreciation 65
- Finish WO 65, 261, 279
- Fixed Asset Valuation 66
- Generate All Chart Images 66, 112
- Generate Charts 69, 112
- Held for Parts 66, 260, 279
- Invoice Resolution 66, 410, 448, 453
- Job Manager 60
- Leave Request 66, 349, 362
- Metric Handler 66, 112
- Payroll Voucher 66, 350
- PM Cycle 66, 260, 281, 320, 338, 342
- PM Finish 66, 261, 320
- PM Routing 66, 320, 326
- PO Closeout 66, 390
- Post Timesheet 66, 362
- Process Fixed Assets 67, 152, 279
- Process Service Timesheet 67, 260, 279, 423
- Project Alert 67, 333
- Purge Data 60, 67
- Purge Requisitions 67, 378, 389
- Purge Work Order 67, 261
- Purge Work Requests 67, 246, 261
- Refresh Materialized View(s) 36
- Regulatory Account Cost 67, 152, 280
- Requisition Template Status Check 378
- Reschedule Work 67, 279, 338, 342
- Reset Demand Quantity 67, 157, 261, 279
- Reset On Order Quantity 68, 158
- Run All Batch 60, 69
- Stock Reorder 68, 158, 443
- Storeroom Demand 158
- Storeroom Repair Costs 69, 158, 457
- Synchronize User 68, 131
- Update Template Status 68
- Vendor Performance 68, 370, 389, 454
- Warranty Expiration Alerts 68, 412, 414
- Work Order Labor 280, 281
- Year End OH Distribution 68
- Year End Overhead Distribution 68, 152

Batch Purge Criteria Business Rule
- Home Page 62
- Purchase Order Module 382
- Requisition Module 374
- Work Order Module 255, 256
- Work Request Module 240

Batch Purge Parameters Business Rule
- Home Page 63
- Purchase Order Module 383
- Requisition Module 375
- Work Order Module 257
- Work Request Module 241

Batch Stock Reorder Business Rule
- Reorder Review Module 440

Benchmark Work Order Module 281

Bill of Materials Module 202

Bin Quantity Tracking Options Business Rule (AMMO) 83

Blanket Contract Access List Business Rule
- Blanket Contract Module 397

Blanket Contract Module 395
Blanket Contract Processing Business Rule
  Blanket Contract Module 396
Blanket Contract Report 398
Budget Checking Business Rule
  Account Module 144
Budget Checking By Document Business Rule
  Account Module 145
Budget Checking Skip Accounts Business Rule
  Account Module 146
Business Rules
  ABC Inventory 160
  Account Creation from Projects 328
  Account Interface 81
  Account Period Override 138
  Account Rules 78
  Accrual Interface 81
  Alerts 255, 373, 381, 424, 436, 444, 450
  Analysis Views Access List 78
  AP Batch Interface 78
  Approval Routing 73
  Asset Depreciation 170, 179, 289
  Asset Interface 81
  Asset Key Segments 171, 290
  Asset Navigator 37
  Asset Runtime 168, 335
  Attachment Drive Mapping 214
  Attachment Print Configuration 213
  Attachment Printing 309
  Attachment Types 214
  Auto Generate Daily Schedule 283, 336
  Auto Generate Weekly Schedule 340
  Available Quantity Calculation 153
  Bar Code Configuration ...425, 436, 439, 445, 451, 458
  Barcode Label Printers 445, 452
  Barcoding Checkout 432
  Batch Job Control 61
  Batch Purge Criteria . 62, 240, 255, 256, 374, 382, 395
  Batch Purge Parameters 63, 241, 257, 375, 383
  Batch Stock Reorder 440
  Bin Quantity Tracking Options 83
  Blanket Contract Access List 397
  Blanket Contract Processing 396
  Budget Checking 144
  Budget Checking by Document 145
  Budget Checking Skip Accounts 146
  C.O. Auto Approve Percentage 393
  Catalog Interface 81
  Change Request Record Types 205
  Charts and Metrics Settings 113
  Checkout Allowable Charge Type 431
  Checkout Processing 431
  Checkout Request 425
  Checkout to Finished WO 82
  Compatible Unit Defaults 198
  Compatible Unit Function 199, 250
  Component ID Rule 189
  Component Processing 190
  Copy/Paste Object IDs 38
  Cost Adjustments 415
  Craft Rates 209, 284, 351
  Credit Card Purchases 266, 376, 384
  Criticality Override 168, 242, 266
  Customer Address Interface 81
  Customer Interface 81
  Customer SA Interface 81
  Default Accts for Interfaces 81
  Default Backlog Groups 242, 267, 317, 337, 341
  Default Directories 38, 187, 191, 399, 445
  Default File Locations 39
  Default Work Request Req Date 243
  Direct Charge Types 345
  Do Attachments Query 40
  Do Notes Query 40
  Downtime Type by Work Type 291
  Drilldown Configuration 41
  EDI Transaction Codes 78
  EMail Configuration 42
  Employee Interface 81
  End of Period Processing 139
  Enforce Receiver 446
  Expense Codes 146, 467
  Federal Tax Rebate 403
  Fleet Constants 291
  Fleet Mileage Reasonability 292
  GIS Asset Interface 78
  GIS Setup 79
  GIS View Attributes 79
  GL Transaction Interface 81
  Holidays 82
  Inspection Report Generation 83
  Interface Parameters 82
  Interfaces 79, 81
  Internal Tracking Options 83
  Invoice Prorate Defaults 406
  Invoice Setup Criteria 154, 404

Invoice Tolerances 407
Labor Burden Multipliers 351
Labor Costing Markups 352
Labor Costing Prem Multiplier 82
Labor Costing Wage Rates 353
Manufacturer Vendor Interface 81
MDI Window Title 41
Multiple Active Contracts 396
Optional Message Presentation 43, 433
Oracle CAI Financials Admin 79
Oracle Financials 79
Oracle Purchasing 79
OUBI Setup 79
Overtime Standings 353
Password Security 129
Payment Terms 365, 408
Payroll Voucher Types 350
Permit Processing 309
Permit Type 308, 313
Physical Inventory Rules 458
Physical Inventory Tolerances 459
PIN Processing Administration 45
Planner 169, 236, 244, 258, 267, 292
PM Fleet Types 299
PM Master Parameters 317
PM Route Options 268, 325
PM Schedule Basis 319
PM Seasonal Adjustments 320
PO Aging Rules 384
PO Report Constants 250, 385
PO Report Status Codes 386
Primary Menu 46
Printer Alias 130, 215
Procedure Attachment Update 230
Procedures Authority 231
Procurement Level 162
Product Int CCB Contacts 80
Product Int CCB FA Types 80
Product Integration 80
Product Integration CCB 80
Product Integration CCB Status 80
Product Integration Field Work 80
Product Integration MWM 80
Project Budget Options 329
Project Management 330
Project Work Order Account 331
Purchasing Options 387, 394
Quote Options 83
Receiving Configuration 437, 446, 452
Regulatory Account Options 151
Regulatory Account Usage Codes 150
Regulatory Acct Overhead Class 151
Repairable Processing 456
Report Labels 79
Requisition to PO Rule 376
Restrict List of Values 46
RFGen Barcoding Setup 79
S_RPT071 Crew Craft Columns 259
SAIF Charge Numbers Interface 79
Schedule Labor Resources 82
Scheduled Holidays 209
Scheduling Options 338
Serv Invoice Account Override 419
Serv Invoice Prorate Defaults 420
Serv Invoice Tolerances 421
Service Request Interface 81
Service Timesheet Charge Types 422
Shelf Life 163
Shift Differential Rates 354
Shipping Memo Options 461
Specification Upload Defaults 192, 447
Spell Check 47
Standard Service Req Interface 80
Storeroom Demand Allocation 156, 427
Storeroom Interface 81
Stores Transaction Groups 82
Timekeeping Authority 210, 347, 355
Timekeeping Charge Types 356
Timekeeping Comp Time Request 357
Timekeeping Copy Options 357
Timekeeping DTA Pay Code 79
Timekeeping DTA Regular Type 79
Timekeeping Editchecks 358
Timekeeping Labor Earning Type 359
Timekeeping Leave Types 348
UDFs- Auto Copy Across Modules 48
Unit of Measurement 49
Update Primary Vendor 163
Validate Task Report Codes 269
Variable Expense Codes 269, 360, 428, 433
Vendor Interface 81
Vendor Options 366
Vendor Performance Attributes 367, 453
Vendor Performance Ranges 368, 400
Warranty Processing 413
Web Configuration 115, 192, 216, 448

  Web Services Gateway 80
  WO Aging 259
  Work Design Phase 251
  Work Design Processing 251
  Work Order Processing 206, 271, 332
  Work Order Task Planning 275
  Work Order Travel Time 275
  Work Priority Defaults 260
  Work Request Authority 244
  Work Request Processing 245
  Work Week 337, 338, 341, 343
Business Rules Module 77
Buyers Module 84

C

C.O. Auto Approve Percentage Business Rule
  Change Order Module 393
Cache
  clear 54
Change Order Module 393
Change Request Module 204
Change Request Record Types Business Rule
  Change Request Module 205
Charts 110
  Actual Cost to Planning Estimate 263
  Corrective vs. Preventive Work Orders 264
  Customer Follow-Up Calls 469
  Departmental Costs Summary 142
  disabling thumbnails 114
  Emergency Work Orders 264
  iis server settings 110
  in Office 2007 111
  Inventory Turns 158, 165
  Inventory Valuation 158, 165
  Late PMs for Safety Equipment 321
  Late Preventive Maintenance Work Orders 321
  Planned Vs. Unplanned Downtime 174, 177
  Planning Accuracy 264
  PM Forecast Months 322
  PM Forecast Months - Estimated Duration 322
  PM Forecast Weeks 322
  PM Forecast Weeks - Estimated Duration 322
  PM History Months 322
  PM History Weeks 322
  PO By Buyer - Count of POs 390
  PO By Buyer - Total Amount 390
  PO By Vendor - Count of POs 370, 390
  PO By Vendor - Total Amount 370, 390
  Preventive Maintenance Investment 264, 322
  Preventive Work Orders 322
  Project Analysis 333
  Timekeeping Analysis 362
  Work Order Aging 264
Charts and Metrics Settings Business Rule
  Work Order Module 113
Checkout Allowable Charge Type Rule
  Stock Checkout Module 431
Checkout Processing Business Rule
  Stock Checkout Module 431
Checkout Request Business Rule
  Checkout Request Module 425
Checkout Request Module 424
Checkout to Finished WO Business Rule (Obsolete) 82
Chemical Label Module 225
Code Table and Codes Module 85
Code Tables
  0 - Yes/No (System) 86
  1 - Work Order Types (System) 86
  2 - Maintenance Classes
    Fleet Work Order Module 296
    Work Order Module 261
    Work Request Module 246
  3 - Maintenance Categories
    Fleet Work Order Module 296
    Work Order Module 261
    Work Request Module 246
  4 - Storeroom Types
    Storeroom Setup Module 160
  5 - Permit Types (Obsolete) 89
  6 - Hazardous Types
    Master Catalog Module 164
  7 - Deliver to Location
    Checkout Request Module 429
    Purchase Order Module 388
    Requisition Module 377
  8 - Permit Cancel Codes
    Permits Module 307
  9 - Repair Codes
    Work Order Task Module 276
  10 - Failure Codes
    Work Order Task Module 276
    Work Request Module 246
  11 - Vehicle Class (Obsolete) 89
  12 - Shop Codes
    Fleet Asset Module 294
    Fleet Work Order Module 296
    Work Order Module Task 275
  13 - Type of Activity
    Activity Tracking Module 287
  14 - Type of Activity Units
    Activity Tracking Module 287

15 - Country Codes (System) 86
    Customer Module 465

16 - Procedure Types
    Procedure Module 229

17 - Issue Methods
    Request for Quotes Module 401

18 - Purchasing Commodity Codes
    Master Catalog Module 164

19 - PM Frequency Codes (System) 86

20 - PM Route Types
    PM Route Module 325

21 - Printer Names for Reports (Obsolete) 89

22 - Vendor Characteristic Types
    Compatible Units Module 196
    Vendor Module 368
    Work Design Module 251

23 - Units of Measure
    Asset Inspection Data Module 184
    Compatible Structure 194
    Compatible Units 197
    Master Catalog Module 164
    Purchase Order Module 388
    Requisition Module 377

24 - Rental Types
    Reservations/Motorpool Module 303

25 - Building Codes
    Asset Module 172
    Fleet Asset Module 294
    Process Module 235
    Tag Point Module 312
    Work Request Module 246

26 - End Use Codes
    Purchase Order Module 388
    Requisition Module 377

27 - Work Codes (Obsolete) 89

28 - Procedure Categories
    Procedure Module 229

29 - Asset Types
    Asset Module 172
    Bill of Materials Module 202
    Procedure Module 229

30 - Runtime (System) 86

36 - Consumables Category (System) 86

31 - Consumable Types
    Consumables Module 464

32 - Consumables Source Codes
    Consumables Module 464

33 - Blanket PO Types (Obsolete) 89

34 - State or Province (System) 86

35 - Category Codes (System) 86
    Blanket Contract Module 398
    Service Contracts Module 418

37 - Specification Types
    Specification Template Module 226

38 - Drive Types
    Fleet Asset Module 293

39 - Fuel Types
    Fleet Asset Module 293

40 - Criticality Codes
    Asset Module 172
    Fleet Asset Module 293
    Work Request Module 247

41 - Work Priority Codes
    Fleet Work Order Module 296
    Work Order Module 261
    Work Order Module Task 276
    Work Request Module 247

42 - Lube Methods
    PM Route Module 325

43 - FOB
    Purchase Order Module 388
    Requisition Module 378
    Vendor Module 368

44 - Lube Types
    PM Route Module 325

45 - Training Courses
    Employee Module Training View 211

46 - Payroll Group
    Employee Module 211

47 - Service Contract Rate Types (Obsolete) 89

48 - Leave Reason Codes
    Employee Module 211
    Leave Request Module 348

49 - PM Route Task Types
    PM Route Module 325

50 - Duration Units (System) 86

51 - Failure Modes
    Work Order Task Module 276

52 - Root Cause Codes
    Work Order Task Module 277

53 - Property Types
    Property Management Module 463

54 - Note Types 49

55 - Property Classes
    Property Management Module 463

56 - Vendor Characteristics
    Vendor Module 368

57 - Container Types
    Multi-Step Receiving Module 454

58 - NCM Disposition Codes
    Multi-Step Receiving Module 454

59 - Material Disposition Repair Types
    Material Disposition Module 456

60 - Duration Units (System) 86

61 - Sources Type for Isolation
    Asset Module 172
    Tag Point Module 312

62 - Required Position for Isolation
    Asset Module 172

63 - Tag Types
    Component ID Module 189, 194

- 64 - Form Function Types (System) 86
- 65 - Purchasing Vendor Characteristics (System) 86, 369
- 66 - Approval Types (System) 86
- 67 - Vehicle Make
  - Fleet Asset Module 294
  - Fleet PM Control Module 301
- 68 - Vendor Classification Types
  - Vendor Module 368
- 69 - Reorder Reviewer Code
  - Storeroom Module 156
- 70 - Measurement Type
  - Operational Tolerance Module 186
- 71 - Work Types for BI Integration (System) 86
- 72 - Timesheet Reg Time Types (Obsolete) 89
- 73 - Property Types
  - Customer Module 465
- 74 - Street Directions (System) 86
- 75 - Asset Mobile Filters
  - Asset Module 172
  - Enterprise Asset Module 470
- 76 - Asset Mobile Filters
  - Asset Module 172
  - Enterprise Asset Module 470
- 77 - Asset Mobile Filters
  - Asset Module 172
  - Enterprise Asset Module 470
- 79 - Phys True Count Item Status (System) 86
- 81 - Loftware Labels
  - Multi-Step Receiving Module 454
  - Receiving Module 448
- 90 - Project Types (Obsolete) 89
- 91 - Standard Note Types
  - Standard Notes Module 228
- 92 - Invoice Item Types (Obsolete) 89
- 93 - Report Output File Formats (System) 86
- 94 - Report Called By Modules (System) 86
- 95 - Rpt Slctn Block File Locations (DBA) 88
- 96 - Report Group (DBA) 88
- 97 - Report Types (DBA) 88
- 98 - Administrative Department
  - Employee Module 211
- 99 - Classification
  - Employee Module 211
- 100 - Checkout Request Priority
  - Checkout Request Module 429
- 101 - Specification Types
  - Specification Template Module 226
- 102 - Specification Types
  - Specification Template Module 226
- 103 - Reqd Documentation Types (Obsolete) 89
- 105 - Specification Categories for Assets
  - Asset Module 172
- 107 - Meter Units
  - Asset Class Module 180
  - Asset Module 172
  - Fleet Work Order Module 296
  - PM Master Module 316
  - Runtime Entry Module 335
  - Work Order Task Module 276
- 108 - Event Groups
  - PM Event Module 324
  - PM Master Module 316
- 109 - Event Types
  - PM Event Module 324
  - PM Master Module 316
- 110 - Backlog Groups
  - Asset Module 172
  - Crew Activity Log Module 286
  - Function Module 234
  - Process Module 235
  - Work Order Module 261
  - Work Request Module 246
- 111 - Overtime Crew
  - Employee Module 211
- 112 - Overtime Zone
  - Employee Module 211
- 115 - Auditor Codes
  - Vendor Module 369
- 120 - Crew Event Types
  - Crew Activity Log Module 286
  - Work Order Activity Log 262
- 121 - Purchasing Event Types
  - Purchasing Log Module 417
- 122 - Commodity Category Codes
  - Master Catalog Module 164
  - Vendor Module 368
- 123 - Commodity Composition
  - Master Catalog Module 164
  - Vendor Module 369
- 124 - Commodity Composition
  - Master Catalog Module 164, 369
- 125 - Commodity Composition
  - Master Catalog Module 164, 369
- 128 - Commodity Composition
  - Master Catalog Module 164, 369
- 129 - Commodity Composition
  - Master Catalog Module 164, 369
- 130 - Asset Interface Types
  - Asset Module 172
- 133 - Eng Spec Linked Codes (Obsolete) 89
- 135 - Assigned Planner (Obsolete) 89
- 136 - Create New Asset Transaction Types
  - Change Request Module 204
- 137 - Function Types
  - Function Module 234
- 138 - Process Types
  - Process Module 235
- 139 - Downtime Codes

  Work Request Module 247
140 - Return Problem Codes (AMMO) 89
141 - Change Asset Information Transaction Types
  Change Request Module 204
142 - Tracking Transaction Codes (System) 86
143 - Receiving Transaction Codes (System) 87
144 - Inventory Transaction Codes (System) 87
145 - Stores Transaction Codes (System) 87
146 - Acct Log Transaction Codes (System) 87
148 - Bin Transaction Codes (System) 87
149 - Requisition Types (System) 87
150 - Confirmation Types
  Purchase Order Module 388
151- Purchasing Item Types (System) 87
154 - Expediting Item Status
  Purchase Order Module 388
155 - Purchase Order Types (System) 87
156 - Invoice AP Procsng Chk Codes (DBA) 88
157 - Invoice Prorate Options
  Invoicing Module 410
158 - Invoice Pay To Vendor Ind (System) 87
159 - Federal Tax Codes
  Invoicing Module 403, 410
  Master Catalog Module 164
  Purchase Order Module 388
  Requisition Module 378
  Work Design Module 252
160 - State Tax Codes
  Invoicing Module 410
  Master Catalog Module 164
  Purchase Order Module 389
  Requisition Module 378
  Work Design Module 252
161 - Duty Codes
  Invoicing Module 410
  Master Catalog Module 164
  Purchase Order Module 389
  Requisition Module 378
  Work Design Module 252
162 - Dispose of Asset Transaction Types
  Change Request Module 204
163 - Change Asset Configuration Transaction Types
  Change Request Module 204
165 - Change Request Types
  Change Request Module 204
166 - Change Request Classes
  Change Request Module 204
167 - Impact Types
  Change Request Module 204
168 - Justification Types
  Change Request Module 204
173 - Vendor Capability
  Vendor Module 369
174 - Vendor Capability
  Vendor Module 369
175 - Vendor Evaluation Grades
  Vendor Module 369
176 - Expense Report Category (Obsolete) 89
177 - Vendor Capability
  Vendor Module 369
178 - Vendor Capability
  Vendor Module 369
179 - Vendor Capability
  Vendor Module 369
180 - Standard Note Doc Types (System) 87
181 - Asset Inspection Type
  Asset Inspection Data Module 184
182 - Asset Inspection Reason
  Asset Inspection Data Module 184
183 - Weather Condition
  Asset Inspection Data Module 184
184 - Approval Doc Types (System) 87
185 - Apprvl Rtng Doc Types (System) 87
186 - Manufacturer Codes 49
187 - Inventory Adjustment Reason Codes (DBA)
  Storeroom Module 88, 156
188 - Manual Hold Adjstmt Reasons (DBA) 88
189 - Work Action Codes
  Work Order Task Module 277
190 - Job Codes
  Fleet Work Order Task Module 298
  Work Order Task Module 276
191 - Work Order Job Codes (Obsolete) 89
192 - Supplier (AMMO) 89
193 - PM Forecast Adjustment Codes (System) 87
194 - Action (AMMO) 89
195 - Problem Trend (AMMO) 89
196 - Category Trend (AMMO) 89
197 - Group Trend (AMMO) 89
198 - PM Categories
  PM Master Module 316
199 - Disposition Trend (AMMO) 90
201 - Quantity Classes (AMMO) 90
202 - Storage Codes
  Master Catalog Module 165
203 - Special Requirements
  Master Catalog Module 165
204 - Shelf LIfe Units (System) 87
205 - Route Description Codes (Obsolete) 89
206 - PM Route Types (Obsolete) 89
208 - Employee Job Title
  Employee Module 211
209 - Relationship Types
  Master Catalog Module 165
212 - Item Class Codes

- Master Catalog Module 164
- 214 - Inspection Types (AMMO) 90
- 215 - Inspection Category (AMMO) 90
- 220 - Drawing Types (Obsolete) 89
- 221 - Component Types
  - Component ID Module 189
- 222 - Component Category
  - Work Order Task Module 277
- 224 - Compatible Unit Difficulty
  - Compatible Unit Module 197
- 225 - Compatible Unit Business Unit
  - Compatible Structure Module 194
  - Compatible Unit Module 197
- 226 - Compatible Unit Class
  - Compatible Structure Module 194
  - Compatible Unit Module 197
- 227 - Compatible Unit Equipment Group
  - Compatible Structure Module 194
  - Compatible Unit Module 197
- 229 - Non-Eqpmnt Asset Records (System) 87
- 230 - Asset Record Types
  - Asset Module 172
  - Component ID Module 189
- 231 - Location
  - Asset Module 173
  - Process Module 236
- 240 - Service Request Types
  - Service Request Module 468
- 241 - Problem Codes
  - Service Request Module 468
- 242 - Deposit and Payment Types
  - Service Request Module 468
- 243 - Process Level
  - Invoice Batch Module 411
- 244 - Ground Condition
  - Asset Inspection Data Module 184
- 245 - Inspection Severity
  - Asset Inspection Data Module 184
- 246 - Disconnect Location
  - Service Request Module 468
- 251 - Personal ID Acct Sgmnt 1 (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 252 - Area/Dept? Acct Sgmnt 2 (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 253 - High Level Acct Sgmnt 3 (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 254 - Mid Level Acct Sgmnt 4 (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 255 - Low Level Acct Sgmnt 5 (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 256 - Flex Acct Number 6 (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 257 - Account Number (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 258 - Account Number (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 259 - Account Number (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 260 - Account Number (DBA) 88
  - Account Module 147
  - Account Structure Module 137
- 276 - Document Media Types
  - Document Control Module 223
- 281 - Report Codes
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 282 - Report Codes
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 283 - Report Codes
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 284 - Report Codes
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 285 - Report Codes
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 286 - Account Treatment Type (System) 87
- 287 - Tracking Method (System) 87
- 288 - Assessment Status (System) 87
- 289 - Service Request Status (System) 87
- 290 - Storeroom Auto-Reorder Sources (System) 87
- 291 - Work Status (System) 87
- 292 - Condition Rating Basis (System) 87
- 293 - Delivery Lead Time Units (System) 87
- 294 - Folders (System) 87
- 295 - Item Type (System) 87
- 296 - Req Status Type (System) 87
- 297 - Rfq Status Type (System) 87
- 298 - Downtime Indicator (System) 87
- 299 - Weekly Schedule Indicator (System) 87
- 300 - Daily Schedule Indicator (System) 87
- 301 - Held For Parts Indicator (System) 87
- 302 - Change Request Indicator (System) 87
- 303 - Po Status Type (System) 87
- 310 - Supervisor Title
  - Crew Module 284
  - Employee Module 212
  - Employee Timekeeping Module 351

  - Project Module 327
- 320 - Facility Types (AMMO) 90
- 321 - Bin Types (AMMO) 90
- 322 - Bin Level (AMMO) 90
- 323 - Bin Storage Types (AMMO) 90
- 324 - Bin Orientation (AMMO) 90
- 325 - Bin Document Types (AMMO) 90
- 340 - PM Master Units (Obsolete) 89
- 360 - Quality Classes
  - Master Catalog Module 164
- 361 - EDI Transaction Types (AMMO) 90
- 409 - Document Classifications Codes
  - Document Control Module 223
- 410 - Document File Types
  - Document Control Module 223
- 450 - Standards Categories (System) 87
- 451 - Unit Code Asset Segment 1 (DBA) 88
- 452 - System Code Asset Segment 2 (DBA) 88
- 453 - Designator Code Asset Sgmnt 3 (DBA) 88
- 454 - Asset Segment 4 (DBA) 88
- 455 - Type Asset Segment 5 (DBA) 88
- 456 - Asset Segment 6 (DBA) 88
- 457 - Asset Segment 7 (DBA) 88
- 458 - Asset Segment 8 (DBA) 88
- 459 - Asset Segment 9 (DBA) 88
- 460 - Asset Segment 10 (DBA) 88
- 470 - Job Hazard Type
  - Job Hazard Module 233
- 471 - Job Hazard Category
  - Job Hazard Module 233
- 472 - Protective Equipment
  - Job Hazard Module 233
- 510 - Vehicle Organization
  - Fleet Asset Module 294
- 511 - Vehicle Sub-Organization
  - Fleet Asset Module 294
- 512 - Monitoring Group
  - Fleet Asset Module 294
- 515- Keys and Locks Set Types
  - Keys and Locks Module 238
- 550 - Direct Charge Category Codes
  - Direct Charges Module 344
- 560 - Workshop Codes (DBA) 88
  - Configuration Guide Module 91
- 561 - Subsystem Codes (DBA) 88
  - Configuration Guide Module 91
- 562 - Module Codes (DBA) 88
  - Configuration Guide Module 91
- 563 - Function Codes (DBA) 88
  - Configuration Guide Module 91
- 564 - Decision Status Codes (DBA) 88
  - Configuration Guide Module 91
- 565 - Priority Codes (DBA) 88
  - Configuration Guide Module 91
- 570 - Hour
  - Operational Schedule Module 304
- 571 - Minute
  - Operational Schedule Module 304
- 600 - Asset Class (Not Used) 89
- 601 - Asset Class Type
  - Asset Class Module 180
- 660 - Vehicle Reason for Repair
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 661 - Vehicle Action Taken
  - Fleet Work Order Task Module 298
  - Work Order Task Module 276
- 662 - Vehicle System
  - Fleet Work Order Module 298
  - Work Order Task Module 276
- 700 - Job Reference Codes
  - Service Contract Invoice Module 419
  - Service Contract Timesheets Module 422
- 710 - Week Days
  - Operational Schedule Module 304
- 730 - Contribution in Aid to Construction
  - Work Design Module 252
- 731 - Work Design Cost Type
  - Work Design Module 252
- 732 - Location Structure Type
  - Work Design Module 252
- 800 - Graph Colors (System) 87
- 1110 - Schedule Plan Summary Label 87
- 1150 - Vehicle Assembly
  - Fleet Work Order Task Module 298
- 1151 - Vehicle Components
  - Fleet Work Order Task Module 298
- 1190 - Daily Schedule Types
  - Daily Schedule Module 338
- 1191- Schedule Interruption Codes
  - Daily Schedule Module 338
- 1192 - RIVA Asset Type
  - Asset Module 173
- 1193 - Tag Point Category
  - Tag Point Module 312
- 1194 - MWM Order Type
  - Work Order Task Module 276
- 1195 - CCB Expense
  - Account Module 147
  - Service Request Module 468
- 1196 - CCB Install Remove Flag
  - Account Module 147
  - Service Request Module 468
- 1197 - Compatible Unit Type
  - Compatible Unit Module 197

2500 - Daily Schedule Types
    Workweek Schedule Module 342

2501 - Interruption Code
    Daily Workweek Module 342

Checklist Title (user-defined)
    Permit Template Module 305

Duration (user-defined)
    Permit Template Module 305

Comp Time 357
Company Module 470
Compatible Structure Module 194
Compatible Unit Defaults Business Rule
    Compatible Units Module 198
Compatible Unit Function Business Rule
    Compatible Units Module 199
    Work Design Module 250
Compatible Unit Module 196
Component ID Module 188
Component ID Rule Business Rule
    Component ID Module 189
Component Processing Business Rule
    Component ID Module 190
Condition Assessment View
    Asset Class Module 180
Configuration Guide Module 91
Consumables Module 464
Copy Record 100
    Account (ACCTDATA) 147
    Account Distribution (ACCTTMPL) 149
    Activity Tracking (ACTTRACK) 287
    Approval Limit (APPROVAL) 72
    Approval Routing (ROUTELIST) 74
    Area (AREA) 142
    Asset (ASSET) 173
    Asset Class (ASSETCLS) 180
    Benchmark Work Order (BENCHWO) 281
    Bill of Materials (BOMDATA) 202
    Blanket Contract (BLNKTCON) 398
    Change Request (CHNGREQ) 206
    Checkout Request (CHKREQST) 429
    Chemical Label (MSDSCHEM) 225
    Compatible Structure (COMPSTRU) 194
    Component (COMPID) 193
    Crew (CREWMOD) 284
    Customer (CUSTOMER) 465
    Department (DEPT) 142
    Direct Charges (ODC) 346
    Document Control (DOCUMENT) 223
    Employee (EMPLOYEE) 212
    Fleet Asset (FLTASSET) 294
    Fleet Benchmark WO (BENCHFLT) 300
    Fleet Operational Schedule (OPERSCHED) 304
    Fleet PM Control (FLEETPMC) 301
    Function (FUNCTION) 234
    Job Hazard (JOBHZRD) 233
    Leave Request (LEAVEREQ) 349
    Maintenance Manager (MAINTMGR) 238
    Master Catalog (CATALOG) 165
    MS Project 333
    MSDS (MSDS) 225
    Operational Tolerance (OPERTOL) 186
    Permit (PERMIT) 310
    Permit Template (PERMTMPL) 306
    PM Event (PMEVENT) 324
    PM Master (PMMASTER) 320
    PM Route (PMROUTE) 326
    Procedure (PROCEDUR) 231
    Process (PROCESS) 237
    Project/Subproject (PROJECT) 327
    Property Management (PROPERTY) 463
    Regulatory Account (REGACCT) 152
    Request For Quotes (RFQ) 401
    Responsibility (RESPONBL) 125
    Service Contract (SERVCONTR) 418
    Service Request (SERVREQ) 468
    Service Timesheet (CTIMESHT) 422
    Shipping Memo (SHIPMEMO) 462
    Standard Notes (STDNOTES) 228
    Storeroom (STORERM) 157
    Storeroom Setup (STORESET) 161
    Tag List (TAGLIST) 315
    Tag Point (TAGPOINT) 313
    Timesheet (TIMESHT) 361
    User Profile (USERPROF) 131
    Vendor (VENDOR) 369
    Warranty (WARRANTY) 414
    Work Design (WODESIGN) 253
    Work Request (WORKREQ) 247
Copy Record View
    Modules Administration - Forms Module 100
Copy/Paste Object IDs Business Rule (General) 38
Cost Adjustment Module 415
Cost Adjustments Business Rule
    Cost Adjustment Module 415
Craft Rates Business Rule
    Crew Module 284

  Employee Module 209
  Employee Timekeeping Module 351
Crafts View
  Master Catalog Module 166
Credit Card Purchases Business Rule
  Purchase Order Module 384
  Requisition Module 376
  Work Order Task Module 266
Crew Activity Log Module 286
Crew Daily Hours View
  Crew Module 285
Crew Employee Assignment View
  Crew Module 285
Crew Module 283
Criticality Override Business Rule
  Asset Module 168
  Work Order Task Module 266
  Work Request Module 242
Currency Exchange Rates Module 91
Custom Business Rules
  Account Rules 78
  Analysis Views Access List 78
  AP Batch Interface 78
  EDI Transaction Codes 78
  GIS Asset Interface 78, 79
  GIS Setup 79
  GIS View Attributes 79
  Interfaces 79
  Oracle CAI Financials Admin 79
  Oracle Financials 79
  Oracle Purchasing 79
  Report Labels 79
  RFGen Barcoding Setup 79
  SAIF Charge Numbers Interface 79
  Timekeeping DTA Pay Code 79
  Timekeeping DTA REgular Type 79
Custom Menu
  sia 107
Custom Menus View
  Modules Administration - Forms Modules 102
Customer Module 465
Customized
  reports 122
  SIA menus 107

D

Daily Schedule Module 336
Database Administration 52
DBA Code Tables 88
dbp_end_period_depreciation 65
Debugging Batch Jobs 70
Default Backlog Groups Business Rule
  Daily Schedule Module 337
  PM Master Module 317
  Work Order Task Module 267
  Work Request Module 242
  Workweek Schedule Module 341
Default Directories Business Rule
  Component ID Module 191
  Operational Data Module 187
  Receiving Module 445
  Request for Quotes Module 399
Default Directories Business Rule (General) 38
Default File Locations Business Rule (General) 39
Default Work Request Req Date Business Rule
  Work Request Module 243
Defining Tables 133
Department Module 142
Depreciation Parameters View
  Asset Class Module 182
Direct Charge Types Business Rule
  Direct Charges Module 345
Direct Charges Module 344
Do Attachments Query
  General System Settings 40
Do Notes Query
  General System Settings 40
Document Control Module 223
Downtime Type By Work Type Rule
  Fleet Asset Module 291
Drilldown Configuration Business Rule
  Asset Navigator 41
Duplicate View
  Modules Administration - Forms Modules 104

E

EDI Transaction Codes Business Rule (Custom) 78
Email Configuration Business Rule (General) 42
Employee Module 208
Employee Timekeeping Module 351
End of Period Processing Business Rule
  Accounting Periods Module 139
  Pay Periods Module 139

- Enforce Receiver Business Rule
  - Receiving Module 446
- Enhanced Security 52
- Enter Data View
  - Modules Administration - Forms Module 100
- Enterprise Asset Module 470
- Enterprise Catalog Module 470
- Event Queue 50
- Expense Codes Business Rule
  - Account Module 146
  - Service Request Module 467

F

- Failed Logon Attempts 52
- Federal Tax Rebate Business Rule
  - Invoicing Module 403
- FGA Responsibility Module 93
- Field Localization View
  - Modules Administration - Forms Module 100
- Fine Grain Access Module 92
- Fleet Asset Module 288
- Fleet Benchmark Work Order Module 299
- Fleet Constants Business Rule
  - Fleet Asset Module 291
- Fleet Mileage Reasonability Business Rule
  - Fleet Asset Module 292
- Fleet PM Control Module 301
- Fleet Reservations/Motorpool Module 303
- Fleet Work Order Module 296
- Fleet Work Order Task Module 296, 298
- Function Module 234
- Functions 231, 233, 321, 339, 342
  - Accept Quality Items 454
  - Activate Chkout Req from Sched 339, 430
  - Activate PINs 131
  - Activate WO Material 262
  - Add Customer Contributed 262
  - Add Dependent Materials 277
  - Add Items from Work Order 430
  - Add Tag Points 310
  - Add Vendor After RFQ Issued 401
  - Add/Delete Job Hazard 232
  - Adjust Store for Recount 459
  - Allow WO Project Update 262, 332
  - Approve All Timesheets 361
  - Assign Contractor to CUs 277
  - Associate Tag List 315
  - Associated Service Request 469
  - Award RFQ 401
  - Bar Code Print Labels 449, 454
  - Cancel PM Master Backlog 321
  - Change PO Auto Pay Indicator 389
  - Change Request Actions for AVL 206
  - Change Request Asset 206
  - Change Request Catalog/Storerm 206
  - Checkout All Planned Items 435
  - Copy PO from PO 389
  - Copy Service Timesheet 423
  - Copy to New Compatible Unit 199
  - Copy to New Service Contract 423
  - Cost and Closeout 277, 346, 361
  - Create Activity Log From Asset 173, 177, 295
  - Create Blanket Contract Revs 398
  - Create Blnket Contract Rev Hist 398
  - Create Checkout Request frm WO 277, 297
  - Create Emergency WO Asset 173, 177, 262
  - Create Emergency WO FleetAsset 262, 294
  - Create Emergency Work Order 262
  - Create New Procedure Revision 232
  - Create Permit From WO 262
  - Create Req from Blanket 378
  - Create Shipping Memo 378
  - Create Specification 173, 177
  - Create Tag List 314
  - Create Templates from Req 378
  - Create Warranty Claim 412, 413
  - Create WO from Benchmark 262, 282
  - Create WO from Service Request 469
  - Create WO From Work Design 252
  - Create Work Order 203, 262, 296
  - Create Work Order Asset 173, 177, 262
  - Create Work Order Component 193, 262
  - Create Work Order FleetAsset 262, 294
  - Create Work Order Process 236, 262
  - Create Work Request 247
  - Create Work Request Asset 173, 177, 247
  - Create Work Request Component 193, 247
  - Create Work Request FleetAsset 247, 294
  - Create Work Request Process 236, 247
  - Credit PM 321
  - Disable Custom SQL 50
  - Display Accrual Tax Total 409
  - Display Trusted Sites Link 113
  - Document to Active 223
  - Duplicate Blanket to PO 398
  - EBS Work Order Materials 81

Employee SSN 212
Employee Wage Rate 212
Entity Relationship Viewer 51
Export RFQ 401
GIS Viewer 51
Graph Viewer 51
Import RFQ 401
Invoice - Override Discrepant 410
Invoice - Resolve Discrepant 410
Invoice Account Override 409
Invoice Pay to Vendors 410
Issue RFQ 401
Issue Uncompiled Objects Msg 51
Log Fleet Downtime 297
Merge Task WOWeek to Day Schd 339, 342
Modify Job Hazard 232
MSR Force PO Complete 454
News Administration 51
Not_Vendor Caused 454
Not_Vendor_Caused 455
Permit to Active 310
Project Closed to Finished 332
Project Finished to Closed 332
Project Management 332
Receive All Items As Ordered 449, 455
Receive More Than Ordered 449, 455
Reconcile CUs 263
Release All 310
Reorder Wizard 51, 147, 157, 443
Repair Removed Part 262, 277, 296, 430, 457
Replace CU Material Item 199
Resend Approval Request 378, 389, 394
Revise Procedure 233
Route Timesheet for Approval 362
Route to Designer 252
Search Duplicate Permits 263
Serv Invoice Account Override 421
Service Contract to Active 423
Service Invoice Export Wizard 421
Set Vendor Auto Pay Indicator 370
Show CU Location 199, 263, 277
Show CU on WO 199, 263, 277
Show Cycle PM Group Now Action 321
Show Cycle This PM Now Action 321
Storeroom ABC 147, 157
Storeroom Adjustment 147, 157
Storeroom Reorder 147, 157
Subproject Approved to Created 332
Subproject Finish to Approved 332
Synergen Password 131
Tag All 310
Timesheet Wizard 361, 362
Transfer Canceled PO Items 389
Update Active CU/CS 195, 200
Update Benchmark WO 263
Update BOM 203
Update Estimate Hours 321
Update Estimate Qty 321
Update MWM 278
Update Pricing on WD 252
Update Process on Work Order 263
Update Reg Acct Dist 277
Value Assets in Prior Year 278
Verify All 310
View External Actual Costs 147
View GIS 174
WO Active to Planning 263
WO Closed to Finished 262
WO Finished to Active 262
WO Finished to Closed 262
WO Task to Active 278
WO to Active 262
Work Type Update 263

G

General Configuration
  Batch Job Control Business Rule 61
  Copy/Paste Object IDs Business Rule 38
  Default Directories Business Rule 38
  Default File Locations Business Rule 39
  Email Configuration Business Rule 42
  Optional Message Presentation Business Rule ... 43, 433
  Primary Menu Business Rule 46
  Restrict List of Values Business Rule 46
  Spell Check Business Rule 47
  UDFs - Auto Copy Across Modules Business Rule 48
  Unit of Measurement Business Rule 49
GIS Asset Interface Rule (Custom) 78, 79
GIS Setup Rule (Custom) 79
GIS View Attributes Rule (Custom) 79

H

Help
  customizing 94

Help Form Module 94
Holidays Business Rule (Obsolete) 82

I

Inspection Criteria View
    Asset Class Module 182
Inspection Report Generation Business Rule (AMMO) 83
Installation Parameters 97
    audit log 51
    batch job debugging 70
    chart thumbnails 114
    chart valuation 113
    module 97
    password reset 51
    phone numbers 51
    spell check 51
    system-wide 51, 113
Integration Business Rules 79
    Product Integration 80
    Product Integration CCB 80
    Product Integration CCB Contacts 80
    Product Integration CCB FA Types 80
    Product Integration CCB Status 80
    Product Integration Field Work 80
    Product Integration MWM 80
    Standard Service Request Interface 80
    Web Services Gateway 80
Interfaces Business Rule (Custom) 79
Interfaces Business Rules
    Account Interface 81
    Accrual 81
    Asset 81
    Catalog 81
    Customer 81
    Customer Address Interface 81
    Customer SA Interface 81
    Default Accts for Interfaces 81
    Employee 81
    GL Transaction 81
    Interface Parameters 82
    Interfaces 81
    Manufacturer Vendor 81
    Service Request 81
    Storeroom 81
    Vendor 81
Internal Tracking Options Business Rule (AMMO) 83
Invoice Batch Module 411
Invoice Prorate Defaults Business Rule
    Invoicing Module 406
Invoice Setup Criteria Business Rule
    Invoicing Module 404
    Storeroom Module 154
Invoice Tolerances Business Rule
    Invoicing Module 407
Invoicing Module 403

J

Job Hazard Module 233
Job Manager Module 60

K

Keys and Locks Module 238

L

Labor Burden Multipliers Business Rule
    Employee Timekeeping Module 351
Labor Costing Markup Business Rule
    Employee Timekeeping Module 352
Labor Costing Prem Multiplier Business Rule (Obsolete) 82
Labor Costing Wage Rates Business Rule
    Employee Timekeeping Module 353
Leave Request Module 347
Log Files 53
Logging In
    failed attempts 52
Login
    single sign on 54

M

Maintenance Manager Module 238
Master Catalog Module 162
Material Disposition Module 456
MDI Window Title Business Rule
    Home Page 41
Metrics 110
    Customer Follow-Up Calls Pending 469
    disabling thumbnails 114
    External Time to Receive Parts 390
    Internal Time to Issue PO 390
    Late PMs 323
    Late PMs for Safety Equipment 323
    Percent Emergency Work 264
    Percent of Planned Downtime 174, 178
    Percent PM Investment 264, 322

- Percent Preventive Work 264, 322
- Total Lead Time 378, 390

Microsoft Project 333

Microsoft Project Interface
- Project Module 333

Modules
- Warranty Claim Module 412
- Warranty Module 413

Modules Administration
- forms 100
- sia 105

Modules Requiring an Approval Title
- Change Order Module 72
- Change Request Module - Asset 72
- Change Request Module - Catalog 72
- Change Request Module - Generic 72
- Change Request Module - Storeroom 72
- Change Request Module - Vendor 72
- Cost Adjustment Module 72
- Crew Module - WO Task Assignment 72
- Direct Charges Log 72
- Direct Charges Module 72
- Employee Timekeeping Module 72
- Invoicing Module 72
- Leave Request Module 72
- Permits Module 72
- Procedures Module 72
- Project Module 72
- Purchase Order Module 72
- Request for Quotes Module 72
- Requisition Module 72
- Service Contract Timesheet Module 72
- Service Request Module 72
- Work Order Module 72
- Work Request Module 72

MS Project
- configuration 333

MSDS Chemical Label Module 225

MSDS Module 225

Multiple Active Contracts Business Rule
- Blanket Contract Module 396

Multi-Step Receiving Module 450

O

Obsolete Business Rules 82

Obsolete Code Tables 89

Operational Asset Data Module 187

Operational Data Module 186

Operational Schedule Module 304

Operational Tolerance Module 186

Optional Message Presentation Business Rule
- Stock Checkout Module 433

Optional Message Presentation Business Rule (General) ..43

Oracle CAI Financials Admin Business Rule (Custom) 79

Oracle Financials Business Rule (Custom) 79

Oracle Purchasing Business Rule (Custom) 79

Organization Module 471

OUBI Setup Business Rule 79

Overtime Standings Business Rule
- Employee Timekeeping Module 353

P

Password
- enhanced security 52
- install parameter for reset 51
- security business rule 129

Password Security Business Rule
- User Profile Module 129

Pay Periods Module 139

Payment Terms Business Rule
- Invoicing Module 408
- Vendor Module 365

Payroll Voucher Module 350

Payroll Voucher Types Business Rule
- Payroll Voucher Module 350

Period Costs View
- Account Module 148

Permit Processing Business Rule
- Permits Module 309

Permit Template Module 305

Permit Template Requirements View
- Asset Module 176

Permit Type Business Rule
- Permits Module 308
- Tag Point Module 313

Permits Module 307
Phone Numbers 51
Physical Inventory Module 458
Physical Inventory Rules Business Rule
  Physical Inventory Module 458
Physical Inventory Tolerances Business Rule
  Physical Inventory Module 459
PIN Processing Administration Business Rule
  User Profile Module 45
Planner Business Rule
  Asset Module 169, 292
  Process Module 236
  Work Order Module 258
  Work Order Task Module 267
  Work Request Module 244
Planner Rule
  Fleet Asset Module 293
Plant Module 471
PM Event Module 324
PM Fleet Types Business Rule
  Fleet Benchmark Work Order Module 299
PM Master Module 316
PM Master Parameters Business Rule
  PM Master Module 317
PM Route Module 325
PM Route Options Business Rule
  PM Route Module 325
  Work Order Task Module 268
PM Schedule Basis Rule
  PM Master Module 319
PM Seasonal Adjustments Business Rule
  PM Master Module 320
PO Aging Rules Business Rule
  Purchase Order Module 384
PO Report Constants Business Rule
  Purchase Order Module 385
  Work Design Module 250
PO Report Status Codes Business Rule
  Purchase Order Module 386
Primary Menu Business Rule (General) 46
Printer Alias Business Rule
  Attachment Modules 215
  User Profile Module 130
Printing
  attachments 213
Procedure Attachment Update Business Rule
  Procedure Module 230
Procedure Module 229
Procedures Authority Business Rule
  Procedure Module 231
Process Module 235
Procurement Level Business Rule
  Master Catalog Module 162
Project Budget Options Business Rule
  Project Module 329
Project Management Business Rule
  Project/Subproject Module 330
Project Work Order Account Business Rule
  Project/ Subproject Module 331
Project/Subproject Module 327
Property Management Module 463
Purchase Order Module 380
Purchasing Log Module 417
Purchasing Options Business Rule
  Change Order Module 394
  Invoicing Module 409
  Purchase Order Module 387
  Requisition Module 377

Q

Quote Options Business Rule (AMMO) 83

R

Receiving (Multi-Step) 450
Receiving Configuration Business Rule
  Multi-Step Receiving Module 452
  Receiving Module 446
  Stock Transfer Module 437
Receiving Module 444
Regulatory Account Options Business Rule
  Regulatory Account Module 151
Regulatory Account Overhead Class Business Rule
  Regulatory Account Module 151
Regulatory Account Usage Codes Business Rule
  Regulatory Account Module 150
Regulatory Accounting Module 150
Reorder Review Module 440
Repairable Processing Business Rule
  Material Disposition Module 456
Report Administration Module 115
Report Labels Business Rule (Custom) 79
Reports 56, 110
  About to Reorder 443
  Accruals By Account 390
  Asset Inspection Worksheet 184

Asset Listing By Type and Class 174
Bill of Material 203
Blanket Contract 398
Business Rule 78
Catalog (without Quantities) 158
Catalog Non-Usage 158
Change Request 207
Code Table 86
Code Table Definition 86
Compatible Units Audit Report 200
Component ID 193
Confined Space 310
Confined Space (Blank) 310
Contract PO Activity 390
custom 122
Daily Schedule 278, 339
Daily Schedule Assignments 339
Deficient Vendors 370
Delivery Receiving 390, 449, 455
Delivery Ticket 390
Employee 212
Employee Pay Period Time 349
Employee Timesheet 362
Equipment History Summary 295
Equipment List by Shop 295
Historic Cost Performance by Asset 174, 264
Historical Cost Performance 295
Holiday Overtime Standing 212, 265
Hot Work Permit 310
Hot Work Permit (Blank) 310
Inspection/Discrepancy Physical Inventory 460
Inventory Picklist 158, 265, 430
Inventory Picklist - Bar Code 158, 159, 265, 430, 438
Invoice Variance 410
Issue Ticket 435
Job Manager Log 69
Labor Distribution by Account 362
Labor Distribution by Employee 362
Labor Expenditure Summary by Account 362
Listing of Completed NCMs 455
Lockout/Tagout 311
Mechanic Accountability 295
New Stock Items 159
New Storeroom Items 159
Open Purchase Order Detail 391
Open Purchase Order Summary 391
Overstock 159
Overtime Standing by Crew 284, 362
Overtime Standing by Zone 362
Payroll 362
Physical Inventory Listing 460
Physical Inventory Variance 460
PM By Asset 174, 321
PM Route 326
Preventive Maintenance 321
Procedures 232
Process 237
Process with Asset Detail 174
Property Inventory - Discrepancies 463
Property Inventory - Items Not Found 460, 463
Property Inventory - Items to be Inventoried 463
Purchase Order 391
Purchase Order - Department Copy 391
Purchase Order - Finance Copy 391
Purchase Order - Not Yet Received 391
Purchase Order - Records with Returns 391
Purchase Order - Vendor Copy 370, 391
Purchase Order Accruals (Unpaid POs) 391
Purchase Order Accruals (Unpaid Receipts) 391, 410
Purchase Order Expensing Account Detail 147, 391
Purchase Order Inventory Item Cost 159, 391
Purchase Order Listing by PO Number 391
Purchase Order Listing by Vendor Code 370, 391
Purchase Order Over Received 391
Purchase Order Report w/Notes & Atchmnts 391
Purchase Order Vendor 370, 391
Ready for Payment 392
Receipt Delivery Worksheet 449, 455
Receiving 392, 449, 455
Receiving Worksheet 392, 449, 455
Request for Quotes 402
Requisition 379
Requisitions (by Vendor) 379
Reservation Dispatch 303
Safety Work Permit 311
Schedule Plan 343
Service Contract Accrued Cost 418
Service Contract Details 418
Service Contract Summary 418
Service Requests 469
Shipping Memo 462
Specification 226
Stock Transfer 159, 438
Stock Transfer - Barcode 438
Storeroom Activity 159
Storeroom Value by Class 159

- Storeroom Value Report by Stock Code 159
- Storeroom Value Report by Vendor 371
- Storeroom with Quantities 159
- Superior Vendor Performance Data 371
- Tax Report for Inventoried Stocked Items 159
- Tax Report for Non-Stocked Items 159
- Understock Report 159
- Vendor Characteristics 371
- Vendor Classification Activity 371
- Vendor Label 371
- Vendor Listing 371
- Vendor Performance by Buyer 371
- Vendor Performance Data 371
- Vendors with 3 or More Deficiencies 371
- Wage Rate History 212
- Work Design 252
- Work Design Comparison 252
- Work Design Estimate 252
- Work Order (Condensed) 265
- Work Order Aging 264
- Work Order Backlog 278
- Work Order Backlog Detail 278
- Work Order Forecast 265
- Work Order Package 265
- Work Order Task Aging 278
- Work Order Tasks Delayed by Materials 278
- Work Request Summary 248, 252
- Workweek Schedule 278

Request for Quotes Module 399

Required Fields View

- Modules Administration - Forms Module 100

Requisition Module 372

Requisition to PO Rule Business Rule

- Requisition Module 376

Reservations/Motorpool Module 303

Responsibility Module 124

Restrict List of Values Business Rule (General) 46

RFGen Barcoding Setup Business Rule (Custom) 79

Routing List Module 73

Runtime Entry Module 335

S

S_RPT071 Crew Craft Columns Business Rule

- Work Order Module 259

SAIF Charge Numbers Intrfce Bus Rule (Custom) 79

SAPI 56

Schedule Labor Resources Business Rule (Obsolete) 82

Schedule Plan Module 343

Scheduled Holidays Business Rule

- Employee Module 209
- Employee Timekeeping Module 354

Scheduling Options Business Rule

- Daily Schedule Module 338

Secondary Fields View

- Modules Administration - SIA Modules 105

Secondary Required Fields View

- Modules Administration - Forms Module 100

Security

- certificate 54

Selection Order By View

- Modules Administration - Forms Modules 104

Sequence Numbers

- Account Distribution (SA_ACCOUNT_DISTRIBUTION) .. 149
- Activity Tracking (SA_ACTIVITY_TRACKING) 287
- Asset (ASSET) 167
- Asset Activity Log (SA_ASSET_ACTIVITY_LOG) 177
- Asset Inspection Data (SA_ASSET_INSPECTION) ...184
- Benchmark Work Order (BENCHMARK) 281
- Bill of Materials (SA_BOM_DATA) 202
- Blanket Contract (SA_BLANKET_CONTRACT) 395
- Change Request (SA_CHANGE_REQUEST) 204
- Compatible Structure (SA_COMPATIBLE_STRUCTURE) 194
- Compatible Unit (SA_COMPATIBLE_UNIT) 196
- Component ID (SA_COMPONENT_ID) 188
- Cost Adjustment (SA_ADJUSTMENT) 415
- Customer (SA_CUSTOMER) 465
- Direct Charges (SA_DIRECT_CHARGES) 344
- Document Control (SA_DOCUMENT) 223
- Employee (SA_EMPLOYEE) 208
- Fine Grain Access (SA_FINE_GRAIN_ACCESS) 92
- Fleet Asset (FLEET) 162, 288
- Fleet Benchmark Work Order (BENCHMARK) 299
- Fleet PM Control (SA_PM_FLEET_CONTROL) 301
- Fleet Work Order (SA_WORK_ORDER) 296
- Function (FUNCTION) 234
- Invoice Batch (SA_INVOICE_BATCH) 411
- Job Hazard (SA_JOB_HAZARD) 233
- Master Catalog (SA_CATALOG) 162
- Multi-Step Receiving (SA_DELIVERY) 450
- Operational Schedule (SA_OPERATIONAL_SCHEDULE) 304

  - Operational Tolerances (SA_OPERATIONAL_TOLERANCES) 186
  - Permit Template (SA_PERMIT_TEMPLATE) 305
  - Permits (SA_PERMIT) 307
  - PM Master (SA_PM_MASTER) 316
  - Procedure (SA_PROCEDURES) 229
  - Project (SA_PROJECT) 327
  - Property Management (SA_PROPERTY) 463
  - Purchase Order (SA_PURCHASE_ORDER) 380
  - Request for Quotes (SA_QUOTE) 399
  - Requisition (SA_REQUISITION) 372
  - Reservations/Motorpool (SA_FLEET_RESERVATIONS) . 303
  - Service Contracts (SA_SERVICE_CONTRACT) 418
  - Service Request (SA_SERVICE_REQUEST) 467
  - Shipping Memo (SA_SHIPPING_MEMO) 461
  - Specification Template (SA_SPECIFICATION_DATA) 226
  - Standard Notes (SA_STANDARD_NOTES) 228
  - Tag List (SA_TAG_LIST) 315
  - Tag Point (SA_TAG_POINT) 312
  - Vendor (SA_VENDOR) 364
  - Warranty (SA_MFR_WARRANTY) 413
  - Warranty Claim (SA_MFR_WARRANTY_CLAIM) 412
  - Work Design (SA_WORK_DESIGN) 249
  - Work Order (SA_WORK_ORDER) 254
  - Work Order Task Failure (SA_WORK_ORDER_TASK_FAILURE) 254
  - Work Request (SA_WORK_REQUEST) 239
- Sequence Numbers (obsolete)
  - ASSET INSPECTION (SA_ASSET_INSPECTION_DETAIL) 83
  - BIN (SA_BIN) 83
  - BIN RELOCATION (SA_BIN_RELOCATION) 83
  - DISCREPANCY (SA_DISCREPANCY) 83
  - INSPECTION (SA_INSPECTION) 83
  - INSPECTION TEMPLATE (SA_INSPECT_TEMPLATE) . 83
  - INTERNAL TRACKING (SA_INTERNAL_TRACKING) 83
  - INVENTORY LOG (SA_INVENTORY_LOG) 83
  - RETURN REQUEST (SA_RETURN_REQUEST) 83
  - STOREROOM REORDER HISTORY (SA_STOREROOM_REORDER_HISTORY) 83
- Sequence Numbers Module 127
- Serv Invoice Account Override Business Rule
  - Service Contract Invoice Module 419
- Serv Invoice Prorate Defaults Business Rule
  - Service Contract Invoice Module 420
- Serv Invoice Tolerances Business Rule
  - Service Contract Invoice Module 421
- Service Contract Invoice Module 419
- Service Contract Module 418
- Service Contract Timesheets Module 422
- Service Request Module 467
- Service Timesheet Charge Types Business Rule
  - Service Contract Timesheets Module 422
- Shelf Life Rule Business Rule
  - Master Catalog Module 163
- Shift Differential Rates Business Rule
  - Employee Timekeeping Module 354
- Shipping Memo Module 461
- Shipping Memo Options Business Rule
  - Shipping Memo Module 461
- SIA
  - custom menus 107
- Single Sign On 54
- Special Lists of Values 106
- Special LOV's View
  - Modules Administration - Forms Modules 101
- Specification Configuration 227
- Specification Module 226
- Specification Template Module 226
  - Lists of Values for 227
- Specification Upload Defaults Business Rule
  - Component ID Module 192
  - Receiving Module 447
- Spell Check Business Rule (General) 47
- Standard Notes Module 228
- Status Required Fields View
  - Modules Administration - Forms Module 100
- Stock Checkout Module 431
- Stock Transfer Module 436
- Storeroom Demand Allocation Business Rule
  - Checkout Request Module 427
  - Storeroom Module 156
- Storeroom Module 153
  - chart valuation 113
- Storeroom Setup Module 160
- Storeroom Stocking Module 439
- Stores Transaction Groups Business Rule (Obsolete) 82
- Subproject View
  - Project Module 333

System Code Tables 86

T

Tag List Module 315
Tag Point Module 312
Taxes
  invoicing 403, 410
  labels 250, 251, 385
  master catalog 164
  purchase order 252, 389
  reorder review 441
  report 159
  Requisition 378
  service contract invoice 420
Thumbnails
  disabling 114
Timekeeping
  auto creation of timesheets 208
Timekeeping Authority Business Rule
  Employee Module 210
  Employee Timekeeping Module 355
  Leave Request Module 347
Timekeeping Charge Types Business Rule
  Employee Timekeeping Module 356
Timekeeping Comp Time Request Business Rule
  Employee Timekeeping Module 357
Timekeeping Copy Options Business Rule
  Employee Timekeeping Module 357
Timekeeping DTA Pay Code Business Rule (Custom) 79
Timekeeping DTA Reg Type Bus Rule (Custom) 79
Timekeeping Editchecks Business Rule
  Employee Timekeeping Module 358
Timekeeping Labor Earning Type Business Rule
  Employee Timekeeping Module 359
Timekeeping Leave Types Business Rule
  Leave Request Module 348
Timekeeping Module 351
Timekeeping Payroll Voucher 350
Transaction Logs
  Account Log 56
  Auditing Log 56
  Blanket Contract Log 56
  Checkout Request Log 56
  Component Log 56
  Crew Activity Log 56
  Direct Charges Log 56
  Document Control Log 56
  Inspection Log 56
  Job Manager Log 56
  Keys and Locks Log 56
  Payroll Log 56
  Property Log 56
  Purchasing Log 56
  Receiving Log 56
  Runtime Entry Log 56
  Service Contract Timesheet Log 56
  Storeroom Transaction Log 56
  Timekeeping Log 56
  Work Order Activity Log 56

U

UDFs 132
UDFs - Auto Copy Across Modules Business Rule (General) 48
Unit of Measurement Rule (General) 49
Update Primary Vendor Business Rule
  Master Catalog Module 163
User Profile Module 128
User-Defined Fields Module 132

V

Validate Task Report Codes Business Rule
  Work Order Task Module 269
Variable Expense Codes Business Rule
  Checkout Request Module 428
  Employee Timekeeping Module 360
  Stock Checkout Module 433
  Work Order Task Module 269
Vehicle Maintenance Reporting Standard 276, 298
Vendor (detail) View
  Request for Quotes Module 401
Vendor Code Structure Module 363
Vendor Module 364
Vendor Options Business Rule
  Vendor Module 366
Vendor Performance Attributes Business Rule
  Multi-Step Receiving Module 453
  Vendor Module 367, 453
Vendor Performance Ranges Business Rule
  Request for Quotes Module 400
  Vendor Module 368

VeriSign 54
VMRS 276, 298

W

Warranty Claim Module 412
Warranty Module 413
Warranty Processing Rule
    Warranty Module 413
Web Configuration Business Rule
    Attachment Modules 216
    Component ID Module 192
    Receiving Module 448
    Reports Administration Module 115
WO Aging Business Rule
    Work Order Module 259
Work 271
Work Design Module 249
Work Design Phase Business Rule
    Work Design Module 251
Work Design Processing Business Rule
    Work Design Module 251
Work Order Module 254
    Finishing Tasks 276
Work Order Processing Business Rule
    Change Request Module 206
    Project/Subproject module 332
    Work Order Task Module 271
Work Order Task Module 266
Work Order Task Planning Business Rule
    Work Order Task Module 275
Work Order Travel Time Business Rule
    Work Order Task Module 275
Work Priority Defaults Business Rule
    Work Order Module 260
Work Request Authority Business Rule
    Work Request Module 244
Work Request Module 239
Work Request Processing Business Rule
    Work Request Module 245
Work Week Business Rule
    Daily Schedule Module 337
    Schedule Plan Module 343
    Workweek Schedule Module 341
Workflow Groups Module 110, 135
Workweek Schedule Module 340

X

XT_CUSTOM_ACTION 107