

Oracle® Utilities Work and Asset Management

Administration User Guide

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Chapter 1

Overview

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.

General users will use the Administration subsystem for changing their user profiles and for establishing WorkFlow Groups. Access to most of the other modules located in the Administration subsystem is usually restricted to a limited number of users or to the System Administrator (SA) and the Database Administrator (DBA) only.

The System Administration subsystem is primarily used for configuring settings. You can tailor the system to fit your business structure and best practices. There are two main aspects of configuration: User Configuration and System Configuration.

User Configuration

User configuration is the process of setting up employees to work with the application. You can specify settings to control all aspects of the user's interaction with Oracle Utilities Work and Asset Management, including: who can use the system, what modules the employee has access to, what privileges the employee has, and message distribution between employees.

System Configuration

Once you have set up users in the system, the next step is to configure the system wide settings. 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.

Select System Configuration from the Administration menu to set attributes for User Profile, Responsibility, Business Rules, Account Structure, Buyers, User-Defined Fields, or Plant.

Chapter 2

Code Tables and Codes

Oracle Utilities Work and Asset Management uses Code Tables to validate user-entered information throughout the system. Each Code Table consists of a unique number, a table description, and a list of allowed codes and their descriptions.

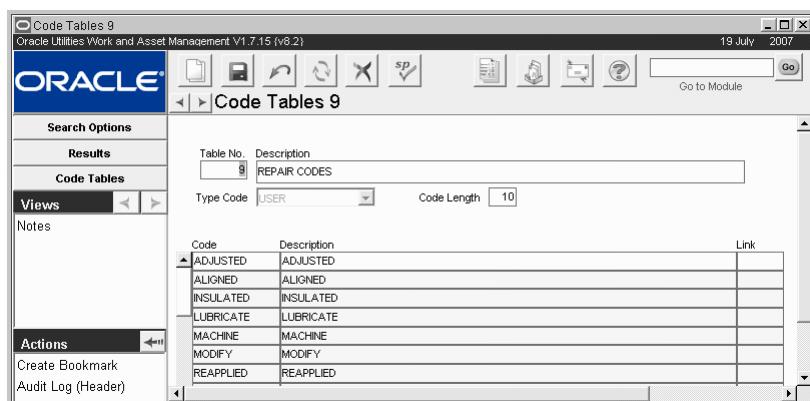
Generally, when a user clicks on the list of values button for a field in a given module, the system presents the list of codes from the appropriate Code Table.

In some cases the system uses information directly from one or more modules rather than from a Code Table. An example would be the Department field on an Area record. When you access the list of values, the list of valid Departments is drawn directly from the Department module, not a Code Table.

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 an Oracle Utilities Work and Asset Management representative.

Code Tables and Codes Records

A Code Table window generally consists of two areas: the header area that contains information specific to the table, and the list of codes with their descriptions.



Code Table and Codes record

The following fields are included:

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 used in the system:

User - Code Tables that contain codes that can be added or modified by users. Generally, these types of codes are not tied to system functionality.

DBA - Code Tables that can only be modified by the Database Administrator. The entered information impacts how the application functions and should only be modified by someone who is aware of how changes impact the system.

System - Code Tables that can be accessed by system users, but cannot 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 Length - The Code length indicates the maximum number of characters that can be used in a code. Changing the Code Length does not affect the display of the code in the list of values.

Code - The Code field contains the individual code name. The system 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. When creating new codes make sure the code is not longer than the Code Length.

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 Catalog 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.

How to Create a Code in a Code Table

1. Open the appropriate Code Table and Codes record.
2. Select an empty Code field.

The system opens a new empty line record for you to complete. You can also select an existing Code and then click New.

3. Enter a unique Code and a short Description.
4. Click Save.

The system checks to ensure that the Code is unique.

Summary

Once code tables are set up with codes that are specific to your organization, the system can validate user-entered information throughout the system against those codes.

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.

Chapter 3

User Profile

Anyone who needs to access the system with a personalized log in must have a User Profile record in Active status. The information contained in the User Profile module concerns the user's interaction with the system.

To create new users administrators can either duplicate an existing user's setting using the Copy Record Action, or they can use the User Enrollment action. One of these two methods must be used.

User Profiles Control User Settings in the System

Each time a user signs on to the application, the system checks this module for default information such as what types of alerts the user should receive, 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.

You can make a user profile active or inactive by setting the Status field. If a user with an inactive profile attempts to sign on they receive a message indicating that they are not authorized to use the system.

Note: Administrators may want to disable the Insert, Update and Delete abilities for most blocks in the User Profile module for most users. 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.

User Profile vs. Employee Record

The User Profile should not be confused with employee information. You can enter any employee into the Employee module of the Resource subsystem, even those who do not have access to the application and therefore do not have a User Profile. However, you must enter employee information in the Employee module before you can set up a User Profile. Then the system fills in details such as phone number, title, and location, for that employee both in the User Profile module and throughout the system wherever their employee number is referenced. Usernames and Employee Numbers must be unique for each user. No duplicates are allowed.

Copy Record Action

Select Copy Record from the Actions list to create an exact duplicate of a user profile record. This functionality differs from duplicating the record in that it can copy all information from the original record, including responsibilities, business rule authority, approval titles, and other details from the views.

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.

Once the action is selected, the system opens a wizard that walks you through the process of copying a user profile. The first screen 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. 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.

Tip: Copy Record is most helpful for copying records that have child records that you would like to have duplicated. For example, a complex Purchase Order with multiple items and accounts.

User Enrollment Action

Select User Enrollment from the Actions list to start a wizard that guides you through the process of setting up a new user in the system. The User Enrollment action is designed only to add a new user. If you want to update the user records produced by the User Enrollment process, you must open the appropriate modules and make changes there. If you try to update an existing record using the User Enrollment action, the system waits until you try to save, then warns you that the record has already been inserted.

User Enrollment Administration

The User Enrollment Action is available to all users with password responsibilities. To grant access to the user enrollment action, add the SYNERGEN PASSWORD responsibility function to the profile of administrators who should have the ability to create users.

Users must have the responsibility function, access to the Responsibility module, and have "create user" database privileges to create a database user from within the wizard.

Please refer to the topic [Administrator Access to User Profile Records](#) for more information on configuring access to user profiles.

How to Enroll a New User

1. Select User Enrollment from the Actions list.

The User Enrollment window opens.

2. Enter a unique username (required) and e-mail address for the new user.

You must enter a unique Username. When you save the record the system checks to see that you have not entered a duplicated username. If you do, the system returns an error message that asks you to enter a different username. The e-mail address that you enter can be used later to automatically send e-mail to electronic online services.

3. Enter the default name, printer, and plant information.

The name is required. Default information is the information that the system uses for various automatic processes.

For example, when you sign on to the system, it uses the default plant in the drop-down list on the initial sign-on window. For more on signing on, see the section titled [Signing On](#).

Note that you do not want to enter the Employee number in this window because the field is completed by the system when you create the new Employee record. The proper place to create the new employee number is when you are following the steps to create an employee record (described below).

4. Click the Next button.

5. Select enrollment options.

Click in the check box for each of the options and business rules that you want to assign to the user. The system takes you through to set up each of the options that you selected in the order shown in the User Enrollment window.

6. Click the Next button.

The system opens the first of the tasks that you have selected.

7. Complete the required information for each task.

Steps for completion of these tasks are described in the following sections:

[Create an Oracle User](#)

[Create an Employee Record](#)

[Enroll a User for Automatic Timesheets](#)

[Assign Responsibility](#)

[Assign Approval Status to a User](#)

[Create a Buyer](#)

You are not offered the option to Create an Oracle User unless you have been granted the specific privilege in Oracle.

When you have completed all of the options you selected, the system returns you to the User Enrollment window where you can either select more options or click the Finish button. If you select an option and then click the Finish button rather than the Next button, the system warns you.

8. Click the Finish button, or select additional options.

The system saves all of the records that have been created in the process of enrolling the new user, and returns you to a blank first screen so that you can enroll another user. If you are finished click Cancel.

The following sections provide more detail on how to complete each of the tasks based on the check boxes you selected.

How to Create an Oracle User

You are not offered this option unless you have been granted the CREATE USER, GRANT ANY ROLE, and SELECT ANY TABLE privileges by a DBA using SQL.

1. **Select whether you want the system to use password encryption.**

If you check the Encrypt Password box, the system encrypts the password and saves it. When the user logs on, it translates the password and uses the encrypted version to confirm access. This limits the users' ability to alter the database. For example, he or she cannot create new users or access the database using other applications (such as Toad or SQL Plus). Encryption does not interfere with the user's ability to change the password later.

2. **Enter and confirm the password.**

Passwords are not case-sensitive and most special characters cannot be used.

Please see notes regarding proxy sessions if they are required by your organization.

3. **Select Default and Temporary Tablespaces from the lists of values.**

As part of every user's security domain, the database administrator can set the user's default tablespace, and the user's temporary tablespace.

Default Tablespace - When a user creates a schema object without specifying a tablespace to contain the object, Oracle places the object in the user's default tablespace. You set a user's default tablespace when the user is created; you can change it after the user has been created.

Temporary Tablespace - When a user executes a SQL statement that requires the creation of a temporary segment, Oracle allocates that segment in the user's temporary tablespace.

4. **Click the Next button.**

The system either opens the window for your next chosen option (Create an Employee record, Assign Responsibility, Assign Approval Status to a User, Create a Buyer, Business Rule) or returns you to the User Enrollment window.

How to Create Employee Record

1. **Enter a unique employee number and last name (both are required).**

The list of values related to this fields is available so that you can see which employee numbers are already in use. If you select an employee number from the list the system will create the duplicate number. Duplicate employee numbers are not advised as they can cause confusion for users and administrators during day to day operations.

2. **Enter hired date and contact information as appropriate.**

3. **Click Next and complete the fields as appropriate.**

The second employee record screen includes several fields that are generally populated according to your individual business practices.

4. **Click Next and complete the fields as appropriate.**

The third employee record screen captures information such as the Department and Area that the employee belongs to, as well as other work and classification information.

The system either opens the window for your next chosen option (Automatic Timesheets, Assign Responsibility, Assign Approval, Create Buyer, or Business Rules) or returns you to the Finish User Enrollment window.

You can also enter similar information directly in the Auto-Timesheet Schedule view to schedule an existing Employee for Automatic Timesheets.

How to Enroll a New User for Automatic Timesheets

1. Enter a Start Date.

Enter the date you want the system to begin creating automatic timesheets for the employee.

You can also enter similar information directly in the Auto-Timesheet Schedule view in the Employee module to schedule an existing Employee for Automatic Timesheets.

2. Enter work day start and end times.

Both fields use a colon to separate hours and minutes (5pm, for example, is entered as 17:00). You can enter the times directly or select from one list of values for hours and then from a second list for minutes.

3. Click Next.

The Daily Timesheet Charges window opens. The fields on this window correspond with the line item fields in the Timesheet module.

4. Enter the appropriate charge information.

Complete all the required fields. When you select a charge number, the system supplies the Charge description. You can enter an additional comment if necessary.

You can only enter one charge number for the employee's daily time here. You can add additional charges to the Auto-Timesheet Schedule view in the Employee module if necessary.

5. Check the days of the week that the employee works.

6. Click Next.

The system either opens the window for your next chosen option (Assign Responsibility, Assign Approval, Create Buyer, or Business Rules) or returns you to the Finish User Enrollment window.

How to Assign Responsibility

1. Enter an initial responsibility.

You can change this responsibility, or supplement it with additional responsibilities later in the Responsibility module of the Administration subsystem. For more information on how to assign responsibilities and how they affect user activity within the system, see the section titled Responsibility module.

You can use the associated list of values, which is controlled by the Responsibility module, to choose a base Responsibility.

2. Enter a starting date.

This is the date the Responsibility becomes active. For example you may enter a date corresponding with a hiring or promotion date, or a date when training on the system is to be completed.

You can double-click the date field to use the calendar feature.

3. Click the Next button.

The system either opens the window for your next chosen (Assign Approval Status to a User, and Create a Buyer, Business Rule) or returns you to the User Enrollment window.

How to Assign Approval Status to a User

1. Enter an Approval Title.

See the section on the Approval Limit module for more information.

2. Select whether the user should be alerted.

See the section on Alerts for more information.

Users who are not set to be alerted still have approval authority but do not receive an alert. Setting this option corresponds to the Alert? box in the Approval Limit module.

3. Select whether the assignment is Active.

Setting this option corresponds to the Active check box in the Approval Limit module.

4. Click the Next button.

The system either opens the window for your next chosen option (Create a Buyer, Business Rule) or returns you to the User Enrollment window.

Caution: Authorizing buyers to update approved or issued purchase orders overwrites standard approval processing. Regardless of the buyer's approval authority, he or she can make changes that affect price and quantity on a purchase order. Please refer to the Administration guide chapter on Buyers for more information on the buyers' role on purchasing documents.

How to Create a Buyer

1. Enter a Buyer Code.

You can use a numerical or alphabetical sequence of three characters for the code. The user's initials or another intuitive code is recommended.

This code is used for fields on records such as Purchase Orders. When you finish enrolling the user, the system copies information to a new record in the Buyers module in the Administration subsystem. The Buyers module will make the data available to lists of values wherever the Buyer Code is used.

2. Enter the user's name as it should appear on purchase documents.

3. Select whether the user can order stores replenishment and change approved purchase orders and other purchase documents.

4. Enter Phone and Fax.

These are the contact numbers vendors and others will use to reach the user.

5. Click the Next button.

The system returns you to the User Enrollment window or to the first Business Rule that you assigned to the user.

How to Set Business Rules Options when Enrolling a New User

If you assigned any Business Rules to the user on the first Enrollment Screen, the system will walk you through the Business Rules that you selected after going through the Options.

Each business rule that is set in user enrollment pertains to setting authority over a certain function or module. Please see the section regarding the individual Business Rule for descriptions of the appropriate entries for the fields: Procedures Authority, Timekeeping Authority, Work Order Authority, Work Request Authority.

How to Add a Function to a User Profile

1. Open the User Profile that you want to add a function to.

2. Click the first empty Key Name field.

You can also place the cursor on a line and Click New. The system opens a new blank line record.

3. Select the Attribute you want to add from the list of values.

4. Enter the appropriate value in the appropriate Key Value field(s).

Which Key Value field(s) must be used will depend on the individual Attribute, check the Key description field at the bottom of the window for hints.

5. Click Save.

The system saves the changes. You may have to log out and then back into the system to see the changes.

User Profile Records

As stated above, new user profiles can only be created using the User Enrollment Action. Once the wizard is complete, you can open the User Profile record to complete the information.

Before a New User Profile can be created, there must be a record for the user in the Employee module of the Resource subsystem. Also, you can select Enroll User from the Actions list to complete several steps in establishing a new user in one process.

User Profile record

The following fields are included:

E-Mail Address - You can receive messages and alerts as regular e-mail, rather than, or in addition to, receiving them on your home page. To do this, enter an e-mail address in your User Profile and check as many of the Receive As check boxes as apply. If you do not mark any of the boxes, you will not receive messages.

Note: It is important to note that when you receive Messages and Alerts as E-mail, you receive text messages only. You do not receive attachments, message flags, or the CC: listing of other persons copied on the message. Also, if you receive an Alert requiring an action on your part, such as an approval, you have to log on to the system to complete that action.

In order for the system to send e-mail, a web server is required, along with access to a SMTP e-mail server. The Web Configuration Business Rules must also be set to define the URL for the Oracle Utilities Work and Asset Management e-mail server.

Message & Alert Options - Check the appropriate boxes for the Messages or Alerts that the User should receive.

Employee Information - When you enter the Employee Number, the system supplies the Job Title, Name, and Phone Number from the Employee module of the Resource subsystem.

Default Information

Name - Enter the User's real name. This is the name that the system uses for Memos, Messages and other records.

Default Printer - The Default Printer entered in this field will override the user's desktop default printer. If a printer is entered in this field and the record is saved, then the field is made blank again, the system remembers the last printer entered in the field and uses that as default.

Plant - When the user signs on, this is the Plant that the system selects. Users with access to multiple plants can then use the Change Plant link on the home page to select a different plant. Users with access to multiple plants have unique user profiles for each plant. If you change to the default plant setting in one profile, the system asks if you want to make the same change in all user profiles for this user.

Key Name and Key Values - Once you have created a User Profile, you can enter information in the “Key Name” and “Key Value” fields in the lower section of the window to define how the system functions for the profile. These fields are referred to as Attributes.

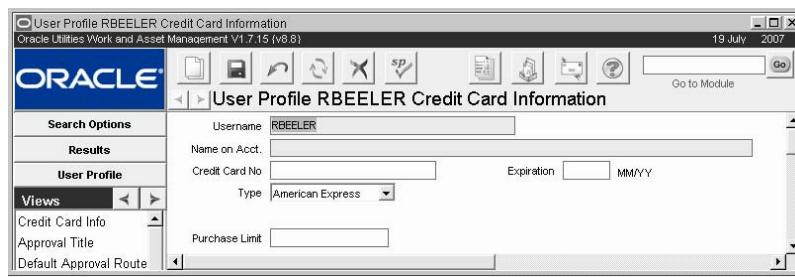
Click the list of values button next to the Key Names field to open a list of Attributes.

Attributes are populated both by you entering information and by the system as a part of online processing. Each Attribute is described briefly in the Key Description column in the list of values window.

For example, to establish a personalized list of reports, select the Key Name DEFAULT_REPORT_GROUP. The Report Group of “My Reports” (description of code MYREPORTS in code table 96) then lists all of the reports entered as Key Names in your User Profile record. (Reports are entered with the report number in the Key Name, the Key Value is set to the sequence number in which the reports are to be listed.)

User Credit Card Information

Select Credit Card Info from the Views list to enter the user’s credit card access. General users can only access this information for their own username.



Credit Card Info view

Credit card information can be used by the system at a later time for functions such as purchases charged to a user’s Company Card, etc.

Approval Title

You can use the Approval Title view to assign Approval Titles to an employee. Before a title can be assigned, it must first be established in the Approval Limits module of the Administration subsystem.

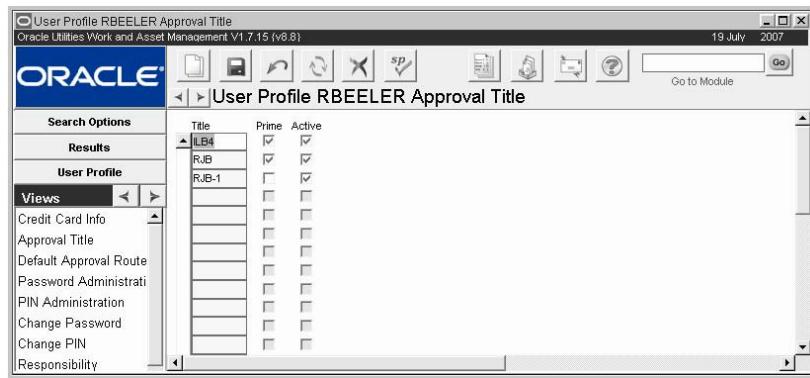
Title - The Title field indicates the assigned Approval Title and has an associated list of values controlled by the Approval Limits module of the Administration subsystem.

Prime - A check in the Prime check box indicates that the employee is to receive an alert when approval by that Approval Title is required. This check box field corresponds to the Alert? check box in the Approval Limits module of the Administration subsystem.

Active - A check in the Active check box indicates that the employee is currently assigned the Approval Title. For example, you might want to assign an assistant manager an approval title in advance but only activate the title when the manager is on vacation.

How to Assign an Approval Title to an Existing Employee

1. Open the appropriate User Profile record.
2. Select Approval title from the Views list.



Approval Title view

3. Select a Title from the associated list of values.

The Title field indicates the assigned Approval Title and has an associated list of values controlled by the Approval Limits module.

4. Check the Prime check box if you want the employee to receive alerts.

A check in the Prime check box indicates that the employee is to receive an Alert when approval by that Approval Title is required. This check box field corresponds to the Alert? check box in the Approval Limits module.

5. Check the Active check box to make the assignment active.

A check in the Active check box indicates that the employee is currently assigned the Approval Title. For example, you might want to assign an assistant manager an approval title in advance but only activate the title when the manager is on vacation.

6. Click Save.

Default Approval Routes

The system uses information from the Default Approval view to automatically complete the Approval Route field on documents created by the user. However, the employee can select another Approval Route if necessary.

For each type of purchasing document that uses Approval Routes, you can select an Approval Route from a list of values showing routes associated with that document type. Work records requiring purchases use the default for the appropriate purchasing record when generating a purchase document. For example, if a direct stock item is placed on a Work Order Materials view, the system will enter the user's default route for requisition if no other route is indicated.

The list of values for the Default Route field is derived from records established in the [Routing List](#) module.



Default Approval Route view

Document Type - You can select document types requiring an approval route from the list of values. The list of values shows only document types you have not previously selected.

Default Route - Select a default Approval Route for each document type. The list of values shows only the Approval Routes that have at least one Approval Title that is not a Notify Only approver.

Routing Name - When you select a Default Route, the system enters the Routing Name.

How to Assign a Default Approval Route to an Employee

1. Open the appropriate User Profile record in the Administration subsystem.
 2. Select Default Approval Routes from the Views list.
 3. Select a Document Type from the associated list of values.
You can select any document type that uses Approval Routes.
 4. Select a Default Route from the list of values for each Document Type.
 5. Repeat Steps 3 and 4 for each document type then click Save.
- Even if you want to use the same Approval Route for each Document type, you must create a separate entry for each Document type.

Password Administration

Select Password Administration from the Views list to see when a User's password was last changed and when the password will expire. Global password characteristics, including minimum length and how frequently passwords must be changed, are set in the Password Security business rule.



Password Administration view

The information on this view cannot be updated directly. Select Change Password from the Views list to change your password, which will update the information shown here.

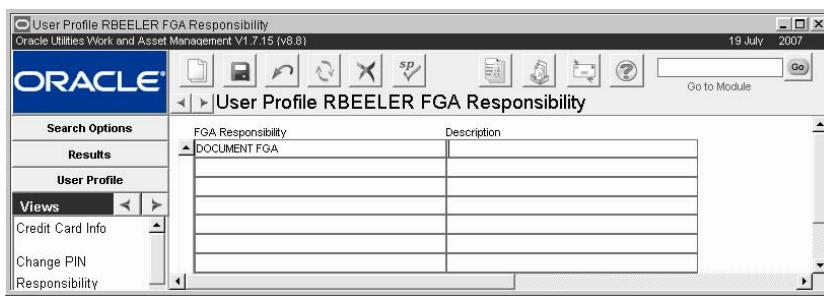
Only users with alter user privileges can change another user's password.

Passwords are not case-sensitive. Most special characters (such as %, \$, or +) cannot be used.

PIN Administration

Select PIN Administration from the Views list to see when this User's Personal Identification Number was last changed and when it will expire. Global PIN characteristics, including minimum length and how frequently PINs must be changed, are set in the PIN Processing Administration Rule.

A check in the PIN Active box indicates that an Active PIN is assigned. If a PIN is locked because the number of failed entries specified in the business rule has been exceeded, the Active PIN box is unchecked and the date the PIN was inactivated appears in the date field. You must have the Activate PINs function responsibility to activate a PIN once it is locked.

**PIN Administration view**

The system automatically deactivates the PIN when the expiration date is reached and the user is prompted to select a new PIN when he or she logs in.

The information on this view cannot be updated directly. Select Change PIN from the Views list to change your PIN, which will update the information shown here.

Change Password

A user can change his or her application password by selecting Change Password from the Views list. Enter the old password, the new password, then reenter it in the confirmation field and save. Once changed, you will have to exit the application and restart it.

Passwords are not case-sensitive and most special characters cannot be used.

Users with administrative responsibility can change another user's password if needed.

How to Change a User Password in the User Profile Module

Once a Password is changed, you will have to exit the application and restart it. Only users with administrative responsibility can change another user's password.

1. Open the appropriate User Profile record.
 2. Select Change Password from the Views list.
 3. Enter the old password.
 4. Enter the new password.
- Passwords are not case-sensitive. Avoid the use of special characters.
5. Enter the new password again to confirm the first entry.
 6. Click the OK button.

Change PIN

A user can change his or her Personal Identification Number by selecting Change PIN from the Views list. Enter the old PIN, then the new PIN, then re-enter it in the confirmation field and Click Save. Unlike when changing a password, you do not have to exit the application and restart when you change a PIN.

Activate Users PIN

If a user's PIN is locked because the number of incorrect entries allowed in the PIN Processing Administration Rule has been exceeded, the system administrator can use the Activate Users PIN action to unlock PIN processing for that user. The User can then use the Change PIN view to enter a new PIN without having to first enter the old PIN.

How to Change a PIN in the User Profile Module

1. Open the appropriate User Profile record.
2. Select Change PIN from the Views list.
3. Enter the old PIN.
4. Enter the new PIN.
5. Enter the new PIN again to confirm the first entry.
6. Click the OK button.

Responsibility

The Responsibility view in the User Profile module gives you a convenient way to assign several Responsibilities to a single user. The alternative is to assign the Responsibilities through the Assigned Users of the Responsibility module.

The Responsibility window in the User Profile module consists of only three fields.

Responsibility - The name of the responsibility. The field has an associated list of values controlled by the Responsibility module.

Start Date - The Start Date field is required and represents the date the Responsibility goes into effect for the user. You can enter a future date in this field. You might want to do this to set up Responsibilities in advance for new employees who have a set hire date, are due to complete training, etc.

End Date - The End Date field represents the last day the Responsibility is in effect for the user.

How to Assign a Responsibility to an Established User in the User Profile Module

1. Open the appropriate User Profile record.
2. Select Responsibility from the Views list.
3. Click the New icon.
4. Select the appropriate Responsibility from the List of values.
5. Enter a Start Date.
If you leave the Start Date field blank, the system does not assign the Responsibility.
6. If desired, enter an End Date.
Assigning an End Date is useful for temporarily assigning responsibilities.
7. Click the Save icon.

How to Discontinue a Responsibility for a User in the User Profile module

1. Open the appropriate User Profile record.
2. Select Responsibility from the Views list.
3. Select the Responsibility that you want to discontinue.
4. Click the Delete button.
The system asks if you are sure you want to delete the record.
5. Click the OK button.
The system removes that line and discontinues the user's access to the responsibility. It will also remove the Responsibility from the list in the Responsibility view of the User Profile module in the Administration system.

FGA Responsibility

This view shows all of the Fine Grain Access Responsibilities that are set for a particular user. Fine Grain Access extends security to restrict the records that individual users can see.

You can add FGA responsibilities directly to this view by selecting FGA IDs from the list of values, but if you are adding several users it may be faster to add the User IDs to the Assigned Users view in the FGA Responsibility module.

FGA Responsibility view

Responsibility Summary

This view allows you to view all of the Responsibilities that are set for a particular user.

Responsibility Summary view

The look of the Responsibility Summary window is very similar to the look of the Responsibilities window in the Responsibility module. However, in Responsibility Summary you cannot make any changes to the information. All changes must be made through the Responsibility module or through the Responsibility in the User Profile module. Any changes made in the Responsibility module are reflected in the Responsibility Summary View.

For a detailed description of the fields in the Responsibility Summary View refer to the section on the Responsibility module.

Note: Administrators should disable the Insert, Update and Delete abilities for this form and block to prevent users from modifying 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.

Chapter 4

Responsibility

In order to access or perform tasks in the Oracle Utilities Work and Asset Management system, each user must have at least one responsibility. Users must be granted privileges to access specific objects within the system. By default, all objects are prohibited to a user unless they have been specifically assigned a responsibility in the Responsibility module or in the User Profile module.

Please refer to the [Configuration Guide](#) for definitions of responsibility functions.

Responsibilities Control User Access to the System

A responsibility is a grouping of one or more capabilities for one or more objects that the user needs to perform work. They allow administrators to determine which functions individual users can utilize and which system elements they can see on screen down to the level of specific fields.

Responsibilities determine standard Select, Insert, Update and Delete privileges. They also determine whether the system displays objects to the user. This method gives administrators the ability to determine what individual users can do - and even see - down to the level of specific fields.

As the system transitions to the Internet Architecture (SIA), responsibilities for SIA based modules will need to be managed separately from the responsibilities for traditional Oracle form based modules. To achieve this, the [Application Security](#) module manages modules that are launched within SIA. Once you establish settings in the Responsibility module, you will need to also configure the settings in the Application Security module.

How responsibilities are used depends on the nature and structure of your organization. Beyond some default responsibilities that are delivered with the system as it is installed, each organization establishes its own responsibilities to meet its unique business 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 considerations as such as business practices, managerial and supervisory responsibilities, level of effort to set up and maintain the system, and personnel turnover.

Setting Up Responsibilities

Setting up responsibilities should be a very carefully planned procedure which takes into account all aspects of your organization's work. Consult with your Oracle Utilities Work and Asset Management representative to determine the best way to set up responsibilities in your system.

Responsibilities cannot be extended to custom programs accessed through the In House menu in the Administration subsystem.

Note: Administrators may want to disable the Insert, Update and Delete abilities for most blocks in the User Profile module for most users. 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.

Responsibility Records

A Responsibility record consists of a unique name in the Responsibility field, a Description field, and the assigned capabilities. The capabilities are grouped into three Responsibility Types and each type is further organized into groups. The use of Types and Groups allows you to select from a targeted list when assigning or withholding an ability. You do not have to choose a group, but if you do not, the list of possible capabilities can be substantially longer.

Responsibility record

A responsibility might include capabilities from more than one Type as well as more than one Group.

The responsibility also contains the Active Ability List, check boxes, and buttons that provide other options and capabilities in the Responsibility module.

The following fields are included:

Responsibility - This field contains the unique name for the responsibility. Make sure that the responsibility name does not contain any spaces. You cannot use drill-down from the User Profile module to access a responsibility that has a space in the name. Avoid the use of the special characters ' ', '&', or '%' as they may result in processing errors. The description field provides space to enter a general description of the responsibility.

Description - The Description field contains a general description of the responsibility. You can enter as much text as you need. Remember that other windows, such as the Results of Search Window, will only show the first few words in the Description field.

Responsibility Type - The Type field uses a pull-down list. The Type determines not only the options available in the group field, but the layout of the lower part of the window as well. The options are Modules, Functions, and Reports.

Modules - The Modules type represents the ability to view(Disp), select(S), insert(I), update(U) and delete(D) within modules in the subsystems.

When you choose the Modules type, the Blocks button appears along the lower edge of the window, and the Display, Select, Insert, Update and Delete check boxes are displayed.

Functions - The Functions type represents the various specialized tasks - for example, awarding a Request for Quotes - that can be performed with proper authority. Generally these are the actions that you can access on the Actions list.

When you choose the Functions type, the Block button and Select, Insert, Update and Delete check boxes are replaced by the Values field. Also, the Ind Activated indicator check box replaces the Display check box.

Reports - The Reports type represents all reports that are available.

When you choose the Reports type, the Block button, Display, Select, Insert, Update and Delete check boxes are replaced by the Ind activated indicator check box.

Charts - Controls the charts that are available to the user from the home page.

When you choose the Charts type, the Block button, Display, Select, Insert, Update and Delete check boxes are replaced by the Ind activated indicator check box.

Filtered Metrics - Controls the filtered metrics that are available to the user from the home page.

When you choose the Metrics type, the Block button, Display, Select, Insert, Update and Delete check boxes are replaced by the Ind activated indicator check box.

Custom Menus - The Custom Menus type provides a listing of all the modules where custom menus are available within the system. Add custom menus to a responsibility to allow users with that responsibility to see the menu.

Copy Records - The Copy Records type provides a listing of all the modules where the Copy Record action is available within the system. Add a Copy Record module to the responsibility to allow users with that responsibility to use the action in a specific module. Modules must also be configured for copying in the Copy Record view of the Module Administration (Forms) module.

Group - Each Responsibility Type is then broken down into groups. The Group field uses a pull-down list that changes depending on the Type chosen. If you leave the Group field blank it represents ALL parts of the system.

Responsibility Active Ability List - The Ability fields are the unlabeled fields just below the Type and Group field.

The system allows you to enter an activity name either manually or using the list of values. However, the system only partially processes the added ability and does not allow you to control the associated Blocks and Fields. Therefore, you should only add activities by using the Add Activity button.

Responsibility Check Boxes - Beside the Active Ability list you will find at least one column of check boxes. The number of these columns depends on the Type you have selected. Most of the boxes correspond to a line of the Active Ability List but the top – and slightly offset – box for each column can be used for checking, or un-checking, all of the boxes at once.

Display, Select, Insert, Update and Delete - These check boxes only appear if you choose the Module type in the Type field. If a box is not checked for an ability, the user will not be able to effect that ability at that level.

For example, if a user's responsibility only has the Display, Select and Update boxes checked for the Asset module, that user will not be able to create a new asset.

Ind - The Ind check box appears for all types other than Module. If the box is not checked for an ability, that item is not available to the user.

Value - The Value field only appears if you choose the Functions type. There are currently no Functions that use the Value field.

Responsibility Buttons - The buttons at the bottom of the window also depend on the Type you indicate in the Type field.

Add Activity - The Add Activity button allows you to add Abilities to the Active Abilities list. It serves two functions: 1. It changes the window to include the Available Activity list and a column of check boxes marked Add, and 2. It moves the selected abilities from the Available Activity list to the Active Ability list.

Back - The Back button only appears after you click the Add Activity button or the Blocks button. If you click the Back button, the system returns to the previous window.

Blocks - The Blocks button only appears when you select the Modules type in the Type field. If you click the Blocks button the window changes to allow you use a list of values to list specific blocks for the module selected in the Active Ability list.

Fields - If you click the Fields button the window changes to allow you to list specific fields for the block selected in the Blocks list.

Note that you must define the blocks before you can work with the associated fields.

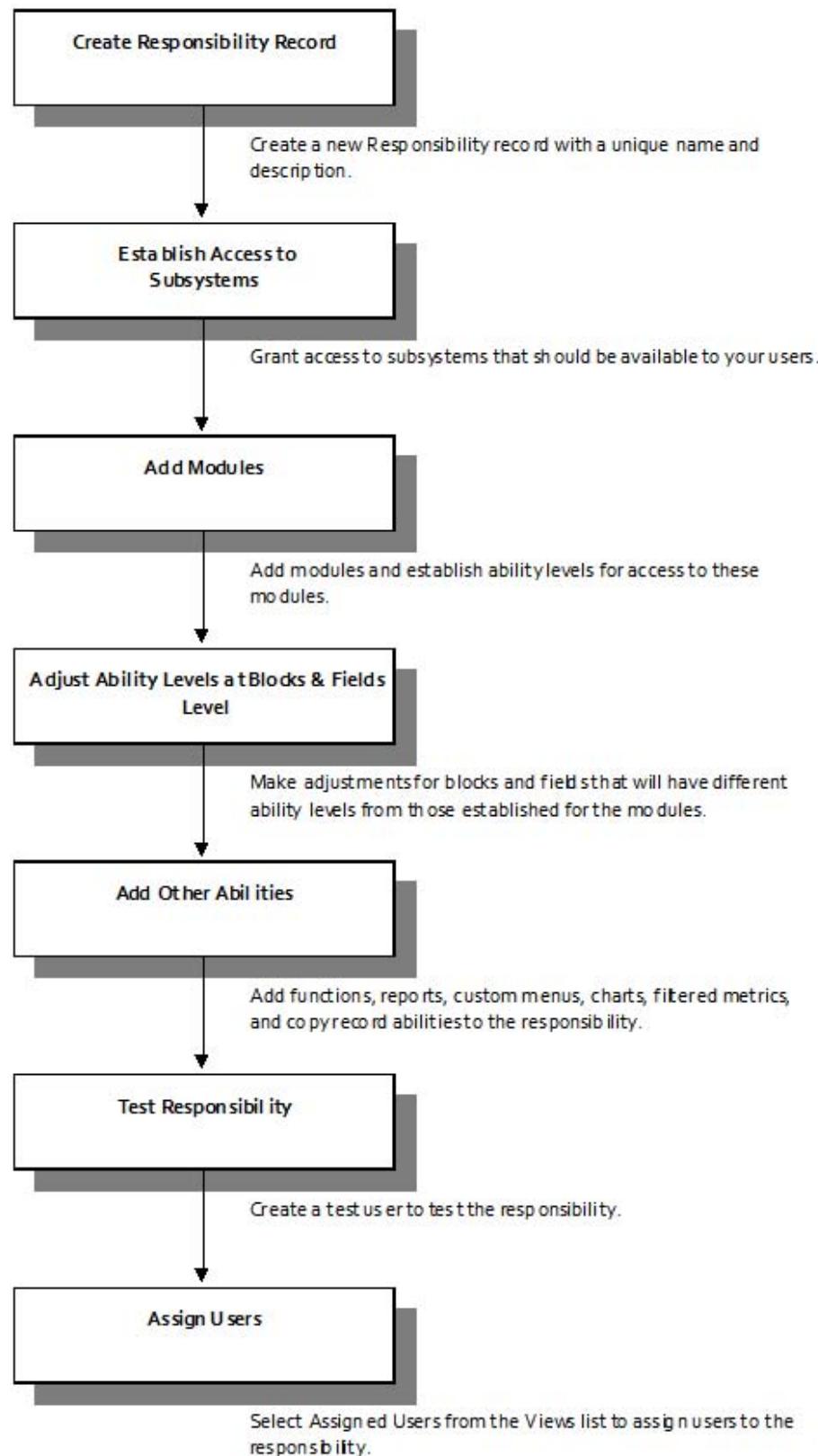
The system cannot force you to select a block or a field name on the list of values. However, a responsibility cannot contain custom field name. You must take care when manually entering any field name to be sure that the entry is correct. If you enter incorrect information in these fields, the ensuing problems can be difficult to isolate and can cause unnecessary production delays for your organization.

Next - The Next button only appears after you click the Fields button. The Next button returns you to the starting Responsibilities window from the Fields configuration of the window.

Process Flow for Establishing a Responsibility

Setting up responsibilities should be a very carefully planned procedure which takes into account all aspects of your organization's work.

The following diagram shows the general process for setting up responsibilities for forms.



How to Establish a New Responsibility

These steps are a general outline for how to approach setting up the responsibilities in your system. More specific instructions on each stage are available in the subsequent instructions.

1. **Create the Responsibility record.**
2. **Set up the responsibility to display any required subsystems.**
[How to Display a Subsystem on the Primary Menu](#)
3. **Add any required modules.**
[How to Add a Module to a Responsibility](#)
4. **Set up the modules for the required levels of ability.**

The possible levels of ability are Display, Select, Insert, Update and Delete. These abilities will be available for all blocks and fields in the module, unless you indicated otherwise in steps 5 through 8.
5. **Add any blocks that will have different ability levels from those established for the modules.**
6. **Set up the blocks for the required levels of ability.**
[How to Control Blocks or Fields](#)
7. **Add any fields that will have different ability levels from those established for the modules.**
8. **Set up the fields for the required levels of ability.**
[How to Control Blocks or Fields](#)
9. **Add any required modules, functions, reports, charts, filtered metrics, custom menus, or copy record abilities.**
[How to Add an Ability to a Responsibility](#)
10. **Test the responsibility.**
[How to Test Responsibilities](#)
11. **Assign the responsibility to users.**
[How to Assign a Responsibility to an Established User in the Assigned User Detail](#)

Displaying a Subsystem on the Primary Menu

All responsibilities have access to the home page. However any subsystems that you want the responsibility to be able to access, must have that subsystem set to Display. If you do not establish the subsystem on the Primary menu, you can still make modules available to the responsibility, but only if they are accessed as views to modules that are on the Primary menu.

How to Display a Subsystem on the Primary Menu

1. **Open the appropriate Responsibility record.**
2. **Select Modules from the pull-down list in the Type field.**
3. **Select Primary from the pull-down list in the Group field.**
4. **Click the Add Activity button.**

The window changes to show the Available Activity list and the Add check boxes.
5. **Click the Add box associated with the subsystem(s) that you want available to the responsibility.**
6. **Click the Add Activity button.**

The system moves the selected subsystem(s) to the Active Ability list and save the changes.
7. **Click the Back button.**

The window returns to its basic appearance, with the Display and Select boxes checked for the subsystem(s). Checking the other boxes has no effect for subsystems. However,

un-checking the Display or Select boxes will cause the subsystem to not appear on the Primary menu.

Adding a Module to a Responsibility

Good examples of modules that you would want to control with responsibilities are the Receiving and Multi-Step Receiving modules. These two modules perform the same basic function, but can be used very differently beyond the basic usage, and they cannot be used together as the information entered does not become integrated between the two modules. It is recommended that you do not use both of them in the same system. You can set responsibilities so that one module is used exclusively while the other is entirely disabled to avoid confusion.

How to Add a Module to a Responsibility

1. **Open the appropriate Responsibility record.**
2. **Select Modules from the pull-down list in the Type field.**
3. **Select the appropriate group from the pull-down list in the Group field.**
If you do not pick a group, the Add Activity list will be unconstrained by Group and therefore much longer than if you do pick a Group.
4. **Click the Add Activity button.**
The window changes to display the Available Activity column. This column contains the modules that have not yet been assigned as abilities.
You can also select a blank Activity field (under the Type and Group fields, and select a report from the list of values. If you use this method you can skip steps 5 and 6. However, this method is not standard (though it may be more consistent with the rest of the application) and may not be fully supported by the application.
5. **Check the Add box next to the modules that you want to add to the responsibility.**
If you do not add a module at this point the entire module is excluded from the responsibility. If you want to add only a portion of a module, you must add the whole module at this point. Once you have added the module, you can click the Blocks and Fields buttons to determine which portions of the module will be included.
6. **Click the Add Activity button.**
The system moves the chosen module(s) from the Available Activity list to the Active Abilities list (under the Type and Group fields).
7. **Click the Back button.**
The window changes back to the basic appearance.
8. **Select the boxes to set the level of Ability for the first selected module.**
These Ability levels (Display, Select, Insert, Update and Delete) will affect the whole module. You can change them for individual Blocks and Fields.
9. **Click Save.**
You must save after setting the Ability level for each module.

Adjusting a Responsibility for Control of Blocks or Fields

Once the subsystems and modules have been added to the responsibility, and the desired Ability levels (Display, Select, Insert, Update and Delete) have been set, you can further adjust the Ability levels for individual blocks within the modules. When you set a module for a responsibility, you set all the accompanying blocks and fields. You do not need to work with the blocks and fields unless the settings that you want are different from the settings that you assigned for the module. These directions are for setting Ability levels for whole block; if you want to adjust Ability levels for one or more fields on a block, skip these directions and refer to the section entitled How to Adjust a Responsibility for Control of Fields.

Blocks do not directly correspond with windows. While one block typically represents one screen (Header, one of the Views, etc.), this is not always the case. Some windows use two or more blocks. In other cases, a View will share the same block as the Header. To check the name of a Block associated with a portion of a window, place the cursor in a field and select About Item from the Help menu.

You can add user-defined fields to a responsibility but you must use the Oracle Utilities Work and Asset Management name for the field (Attribute 1, Attribute 2, etc.) rather than the display label that you assign to the field.

How to Control Blocks or Fields

1. **Open the appropriate Responsibility record.**
2. **Select the appropriate module in the Active Abilities list.**
Selecting the module allows the system to find the blocks associated with the module.
3. **Click the Blocks or Fields button.**
The window changes to show either the Blocks or Fields list.
4. **Select a block or field from the list of values.**
The system determines the contents of this list by checking against the selected module.
Administrators may want to disable the Insert, Update and Delete abilities for most blocks in the User Profile module for most users. 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.
5. **Select the boxes to set the level of Ability for the first selected block and/or field.**
These Ability levels (Display, Select, Insert, Update and Delete) will affect the whole module. You can change them for individual Blocks and Fields.
6. **Click Save.**
You must save after setting the Ability level for each block or field.

Adding Abilities to a Responsibility

Like subsystems and modules, functions, reports, charts, filtered metrics, custom menus, and copy record abilities can be included or excluded from a responsibility. Functions represent various specialized tasks that can be performed with proper authority – for example, awarding a request for quotes. In most cases these are the actions that you can access on the Actions list. When one of these abilities is added to a responsibility, users with the responsibility have access to that element from their home page. Functions are generally accessible throughout the system, or in the module where they apply.

Since all of these elements are added to a responsibility in the same way, the following process for adding an ability is given as a general example:

How to Add an Ability to a Responsibility

1. **Open the appropriate Responsibility record.**
2. **Select an ability from the pull-down list in the Type field.**
When you choose one of the Types, the Block button, Display, Select, Insert, Update and Delete check boxes are replaced by the Ind check box. If the box is not checked for an ability, that item is not available to the user.
3. **Select the appropriate group (subsystem) from the list in the Group field.**

Picking a group can help to shorten the list of functions that displays in the Add Activity list to a more manageable size.

Groups within the Function Type include: Admin, Inventory, Maintenance, Purchasing, Bar Code, Home, Inventory Bin, Purchase, Workflow, and Resource. They represents all special functions for modules in the named subsystem or module.

4. **Click the Add Activity button.**
The window changes to display the Available Activity column which contains the functions that have not yet been assigned.
5. **Check the Add box next to the Function(s) that you want to add to the responsibility.**
6. **Click the Add Activity button.**
The system moves the chosen function(s) from the Available Activity list to the Active Abilities list (under the Type and Group fields).
7. **Click the Back button.**
The system saves the changes and reverts back to the basic appearance with the Ind boxes checked for the new abilities.

Testing Responsibilities

Responsibilities should be tested before they are released. A badly designed responsibility can cause a great deal of frustration and extra work for users and database administrators. Also, you can accidentally exclude yourself from the ability to work with the responsibilities by turning off your access to the module.

Note: Be careful not to accidentally exclude yourself from the ability to work with the responsibilities by turning off your access to the Responsibility module.

How to Test Responsibilities

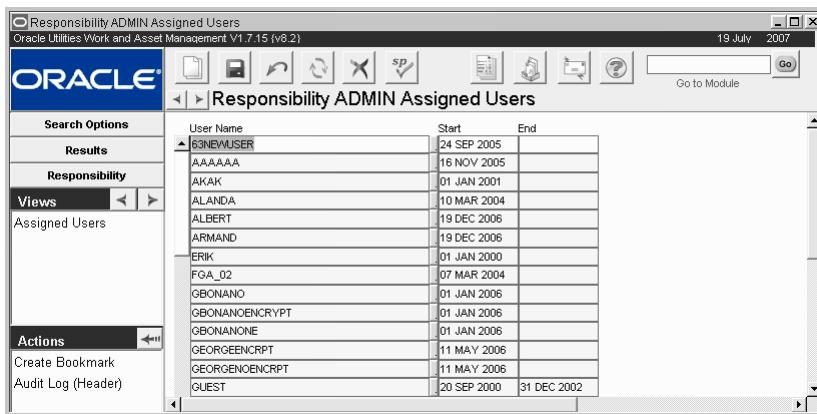
1. **Create a test user.**
You can use the User Enrollment action in the User Profile module.
2. **Assign a single responsibility to the test user.**
Since responsibilities are additive, they may interact and make it difficult to tell which one is affecting the user. It is generally better to work with only one assigned responsibility at a time.
3. **Open a second session using the name and password for the test user.**
4. **In the second session, check how the responsibility affects the test user.**
5. **In the first session, make any changes to the responsibility.**
6. **In the second session, select About User from the Help menu.**
The system opens the About User window.
7. **Log off then back on again for the test user session.**
8. **Repeat steps 4 - 7 until you are satisfied with the responsibility.**

Responsibility Views

The module includes the following view:

Assigned Users

Select Assigned Users from the Views list for a quick way 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.



Assigned Users view

Note: Using the Assigned Users view in the Application Security module allows you to quickly assign a single responsibility to several users.

The Assigned Users window consists of only three fields.

User Name - Enter the user ID for the person assigned the responsibility. The field has an associated list of values controlled by the User Profile module in the Administration subsystem.

Start Date - The Start Date field is required and represents the date the responsibility goes into effect for the user. You can enter a future date in this field. You might want to do this to set up responsibilities in advance for new employees who have a set hire date, are due to complete training, etc.

End Date - The End Date field represents the last day the responsibility is in effect for the user. Assigning an end date is useful for assigning temporary responsibilities or forcing a review of a responsibility.

How to Assign a Responsibility to an Established User in the Assigned User Detail

1. Open the appropriate Responsibility record.
2. Select Assigned Users from the Views list.
3. Click the New icon.
4. Select the username from the list of values.
5. Enter a Start Date.
If you leave the Start Date field blank, the system does not assign the responsibility.
6. If desired, enter an End Date.
Assigning an End Date is useful for temporarily assigning Responsibilities.
7. Click the Save icon.

How to Discontinue a Responsibility for a User in the Assigned User Detail

1. Open the appropriate Responsibility record.
2. Select Assigned Users from the Views list.
3. Click the username.
4. Click the Delete button.

The system asks if you are sure you want to delete the record.

5. Click the **OK** button.

The system removes that line and discontinues the user's access to the responsibility. It will also remove the Responsibility from the list in the Responsibility view of the User Profile module in the Administration system.

Cautions about Responsibilities

1. Use a test environment when exploring responsibilities.

Setting up complex responsibilities and assigning them to several users can be time consuming. Therefore, it is strongly recommended that when you are exploring responsibilities, you use a testing environment, or in a separate plant. If you create a responsibility and assign it to a user in your production environment, all other production users in that plant will have to be assigned responsibilities before they will be able to continue work.

2. Responsibilities are additive.

If you have two responsibilities; one that allows Insert for a type of record and another that allows Delete for the same record type, you will be able to both insert and delete (but not Update unless one of the two responsibilities allows update for that record type).

3. Responsibilities work by both inclusion and exclusion.

Subsystems, modules, functions, and reports must be included in the responsibility if the user is to be able to manipulate them. But, once a module is included, blocks and fields are also included (at the level of control assigned to the module) unless you specifically list them for exclusion or a different level of control.

4. Responsibilities should be tested before they are released.

A badly designed responsibility can cause a great deal of frustration and extra work for users and database administrators.

5. Responsibilities will not apply to custom (In House) work.

You can, however, see the In House menu by adding the Custom Menu activity in the Administration group under the Modules type.

6. Responsibilities cannot contain custom block or field names.

You can add user-defined fields to responsibilities but you must use the Oracle Utilities Work and Asset Management name for the field (Attribute 1, Attribute 2, etc.) rather than the display label you assign to the field.

The system cannot force you to select Block and field names on the lists of values for these fields. You must take care when manually entering Block and field names to be sure that the entry is correct. If you enter incorrect information in these fields, the ensuing problems can be difficult to isolate and can cause unnecessary production delays for your organization.

Chapter 5

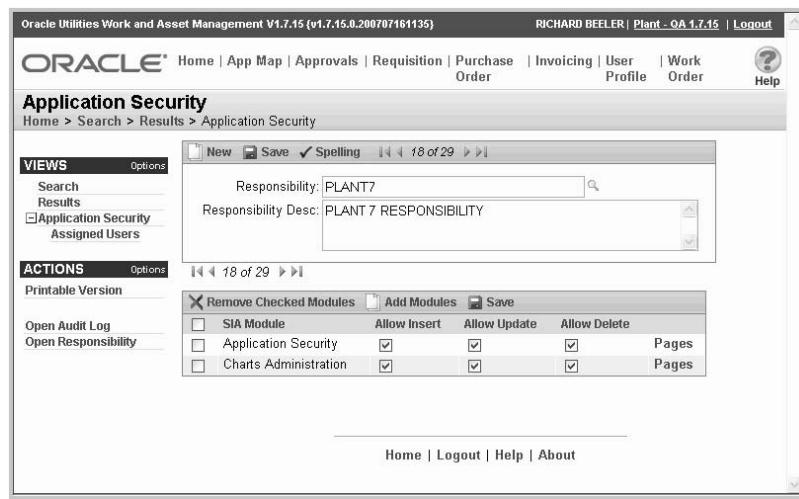
Application Security

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. For more information on how responsibilities work, please refer to the User Guide on the Responsibility module.

Note: Setting up responsibilities should be a very carefully planned procedure which takes into account all aspects of your organization's work. Feel free to consult with your Oracle Utilities Work and Asset Management representative to determine the best way to configure your system.

Application Security Records

Application Security records consist of a unique name in the Responsibility field, a Description field, and the assigned capabilities.



The screenshot shows the Oracle Utilities Work and Asset Management V1.7.15 Application Security record interface. The window title is "Application Security" and the URL is "Home > Search > Results > Application Security". The interface includes a search bar with "Responsibility: PLANT7" and "Responsibility Desc: PLANT 7 RESPONSIBILITY". Below the search bar is a grid of results. The grid has columns for "Responsibility", "Responsibility Desc", and checkboxes for "SIA Module", "Application Security", and "Charts Administration", each with "Allow Insert", "Allow Update", and "Allow Delete" checkboxes. The grid shows 18 of 29 results. At the bottom of the grid, there are buttons for "Remove Checked Modules", "Add Modules", "Save", and "Allow Delete". The bottom of the window has links for "Home", "Logout", "Help", and "About".

Application Security record

The following fields are included:

Responsibility - This field contains the unique name for the responsibility. Make sure that the responsibility name does not contain any spaces. When you save, the system verifies that the responsibility name is unique. If it is not, you will be prompted to create a unique name.

Description - This field is used to provide a general description of the responsibility. There is no limit on the amount of text that can be entered.

Application Security Views

The module includes the following views:

Active Ability List

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.

Add Modules Search Options

Enter a subsystem and/or module to filter by, or leave the fields blank and click the Next button. The Add Modules wizard displays a screen where you can select the modules to add to the responsibility.

Add Modules

Check the box next to each module you want to select, or check the box at the top of the column to select all. Click the Finish button to return to the Application Security record.

Application Security record

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.

Pages

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.

Page	Available	Allow Insert	Allow Update	Allow Delete	Fields
Calendar	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
CopyScheduleWizard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
CopyTasksWizard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
CrewEmployees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
LaborSummary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
LeaveSummary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
PicklistOptions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
PicklistResults	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
PicklistSearch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
Resources	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
ResourcesData	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
Search	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields
WFPicklistResults	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fields

Pages screen

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.

Fields

The fields screen works in the exact same way as the Pages screen. If no fields are configured, the system defaults to have all available fields accessible to the responsibility. If only the Available check box is selected, users have the insert and update abilities. If a check is placed in the Allow Insert or Allow Update columns, it is assumed that any abilities for the field that are left unchecked are not available to the responsibility.

Field Name	Available	Allow Insert	Allow Update	Modified
CRAFT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CREW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
PLANT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
SCHEDULE_START_DATE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Fields screen

Assigned Users

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.

Approver Name	Starting Date	Ending Date
RBEELER	24 Oct 2000	
IBROWN	19 Jul 2007	

Assigned Users view

Note: Using the Assigned Users view in the Application Security module allows you to quickly assign a single responsibility to several users.

User Name - Select the Add Users icon to build a list of active users for the responsibility. The list of available usernames is controlled by the User Profile module.

Start Date - The system automatically enters the current date for the responsibility start date.

End Date - The End Date field represents the last day the responsibility is in effect for the user. Assigning this date is useful for granting temporary responsibilities or forcing a review of a responsibility.

Cautions About Responsibilities

1. Use a test environment when exploring responsibilities.

Setting up complex responsibilities and assigning them to several users can be time consuming. Therefore, it is strongly recommended that when you are exploring responsibilities, you use a testing environment, or in a separate plant. It is best not to test or make changes to your production environment.

2. **Responsibilities are additive.**
If a person is assigned two responsibilities; one that allows insert for a type of record and another that allows delete for the same record type, that person can both insert and delete. If you want to exclude the user from access to certain pages or activities, make sure that none of the assigned responsibilities includes those privileges.
3. **Responsibilities work by both inclusion and exclusion.**
Modules must be included in the responsibility if the user is to be able to manipulate them, but once a module is included pages and fields are all included unless you specifically list them for exclusion or a different level of control.
4. **Responsibilities should be tested before they are released.**
A badly designed responsibility can cause a great deal of frustration and extra work for users and database administrators.

How to Test Responsibilities

Responsibilities should be tested before they are released. A badly designed responsibility can cause a great deal of frustration and extra work for users and database administrators. Also, you can accidentally exclude yourself from the ability to work with the responsibilities by turning off your access to the module.

1. **Create a test user.**
You can use the User Enrollment action in the User Profile module.
2. **Assign a single responsibility to the test user.**
Since responsibilities are additive, they may interact and make it difficult to tell which one is affecting the user. It is generally better to work with only one assigned responsibility at a time.
3. **Open a second session using the name and password for the test user.**
4. **In the second session, check how the responsibility affects the test user.**
5. **In the first session, make any changes to the responsibility.**
6. **In the second session, select About User from the Help menu.**
The system opens the About User window.
7. **Log off then back on again for the test user session.**
8. **Repeat steps 4 - 7 until you are satisfied with the responsibility.**

Chapter 6

Fine Grain Access

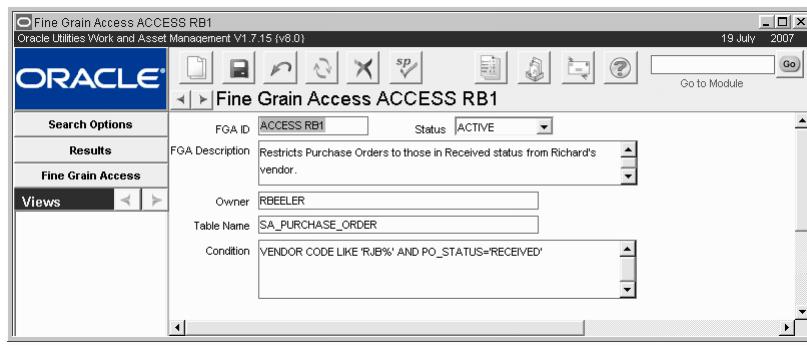
Administrators can use Fine Grain Access to extend security beyond the levels permitted in the Responsibility module. While Responsibilities restrict the modules and functions available to users, Fine Grain Access operates during searching to restrict the records that individual users can see. For example,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

Fine Grain Access Records

Fine Grain Access requires an additional 'where clause' that is applied to all database queries the user runs against the table identified in the FGA record.

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.

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.



Fine Grain Access record

The following fields are included:

FGA ID - The identifier for the FGA record can be entered manually or you can configure the Sequence Number module to create system-generated numbers.

Status

Active - FGA records are created in Active status.

Inactive - FGA records in Inactive status cannot be assigned in the FGA Responsibility module. If a control is not currently needed, but may be needed in the future, setting it to Inactive status avoids the need to re-input the record later.

Description - You can enter a description to help identify the FGA. The first portion of the description appears on the Search Results list when you are searching the Fine Grain Access module and also in the FGA Responsibility module when you are adding a FGA record to a responsibility.

Owner - You can enter your name as Owner, or select another name 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 system table. 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 - This field contains 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'

How to Create a FGA Record

1. Open the Fine Grain Access module.

The Fine Grain Access module is in the Administration Subsystem.

2. Click New.

3. Enter a unique FGA ID.

If your system is configured to create FGA identifiers automatically, you do not have to enter an ID.

4. Enter a Description and Owner if you want to help identify the FGA record.

Both Description and Owner are values you can specify when searching the Fine Grain Access module.

5. Select a Table Name from the list of values.

The additional FGA condition applies when the user enters a query against the table that you specify.

6. Enter a Condition.

Enter the SQL selection criteria clause you want the system to add to queries executed against the table by the user.

7. Click Save.

Chapter 7

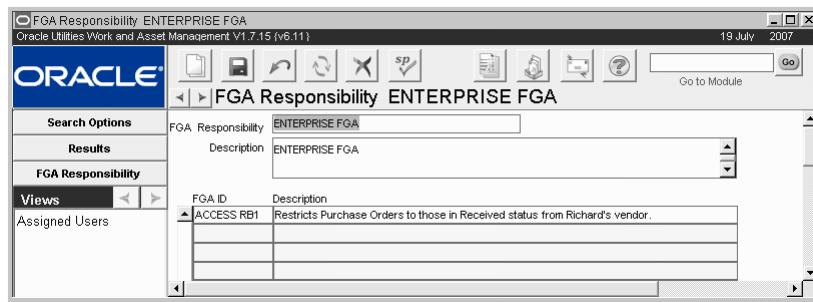
FGA Responsibility

Administrators can use Fine Grain Access to extend security beyond the levels permitted in the Responsibility 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.

FGA Responsibility Records

FGA controls must first be defined in the Fine Grain Access module. These records can then be added to a FGA Responsibility, which can be assigned to specific users. Since each FGA record contains a single where clause and references a single table, the FGA Responsibility module is useful in allowing you to group several of FGA records together to reflect the controls meaningful a work environment. You can add as many FGA records as necessary to a single FGA Responsibility to accurately define the degree of security you wish to achieve. If a single user can has multiple FGA Responsibilities referencing the same table, all the condition statements will be appended together into a single where clause.

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 record

The following fields are included:

FGA Responsibility - You must enter a unique identifier and save the FGA Responsibility record before you can select FGA controls in the lower section of the window.

Description - You can enter a description to help identify the FGA Responsibility. The first portion of the description appears on the Search Results list when you are searching the FGA Responsibility module and also on the FGA Responsibility view in the User Profile module.

FGA ID - The FGA ID is the unique identifier for FGA records in the Fine Grain Access module. After you have entered a FGA Responsibility identifier and saved the record, you can add specific controls by selecting the FGA IDs from the list of values.

Description - The system supplies this description when you select an FGA ID.

How to Create a FGA Responsibility

1. **Open the FGA Responsibility module.**

The FGA Responsibility module is in the Administration subsystem.

2. **Click New.**

3. **Enter a unique identifier in the FGA Responsibility field.**

4. **Enter a brief description to help identify the responsibility.**

5. **Click Save.**

6. **Select the first FGA ID from the list of values.**

The list of values is controlled by the Fine Grain Access module and includes only FGA records in Active status. When you select the FGA ID, the system completes the Description from the FGA record.

7. **Click the Save icon**

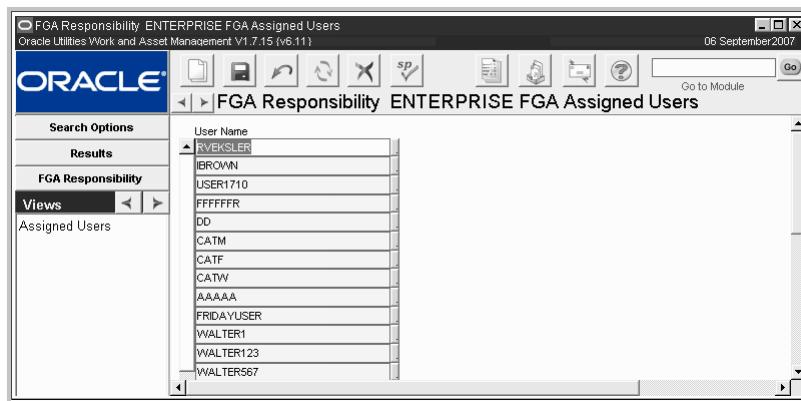
You can now move to the next line and select another FGA ID. You can continue to select FGA IDs from the list of values until you have added all FGA conditions to the Responsibility. Remember to click the Save icon before moving to the next line.

FGA Responsibility Views

The module includes the following:

Assigned Users

The Assigned Users view gives you a quick way to assign a FGA Responsibility to several users. The alternative is to assign FGA Responsibilities through the FGA Responsibility view of the User Profile module in the Administration subsystem.



Assigned Users view

How to Assign a FGA Responsibility

1. Open the appropriate FGA Responsibility record.
2. Select Assigned Users from the Views list.
3. Click the New icon or select the first blank line.
4. Select a User Name from the list of values.
5. Click Save.

If you are assigning the FGA Responsibility to several users, repeat Steps 3-5 as needed.

Chapter 8

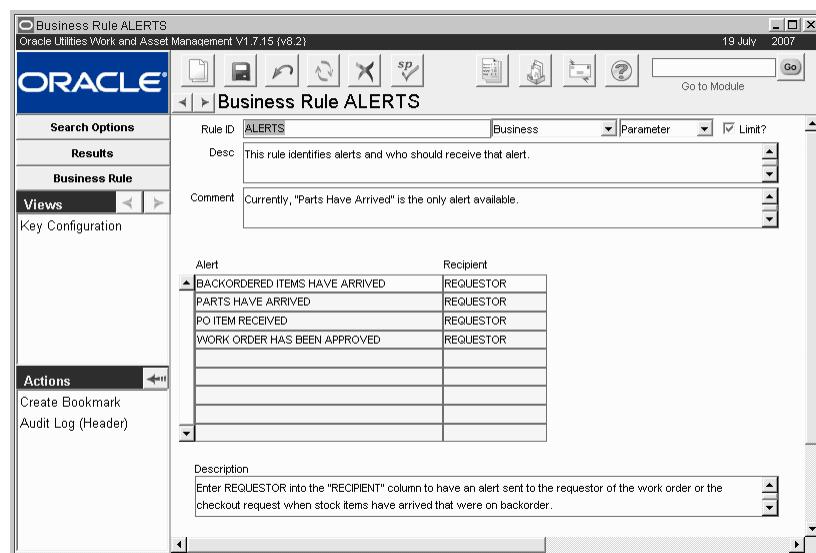
Business Rules

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 flexibility without having to recreate the software for each organization.

Please refer to the [Configuration Guide](#) for individual rule descriptions.

Business Rule Records

Once business rules 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.



Business Rule record

The rule options can then be set to control processing throughout the system so that they best emulate your daily business procedures. An example might be setting Physical Inventory processing to print Blind Count Sheets (not listing the item quantities currently stored within the system) or standard Count Sheets (listing the current inventory quantity stored in the system).

Precaution

Once business rules 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.

Business Rule Records

Rules vary in their nature, some control how the system processes information, others store default information and parameters. Most of the Rules are self-explanatory. Look in the Description and Comment fields for details on the function of the Rule. For any given rule you set the Options Status to ON or OFF, YES or NO to activate or deactivate it.

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

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

As new functionality is added, Oracle Utilities Work and Asset Management 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.

Please refer to the [Configuration Guide](#) for individual rule descriptions.

Business Rule Field Descriptions

In general, the following fields are included on each business rule screen:

Rule ID - Each business rule is defined with a unique Rule ID.

Rule Type (First Unlabeled Field) - There are three types of business rules, though the distinctions are primarily to help in searching for specific groups of rules:

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 - Some rules are so specific that they must be customized specifically for your organization. An example would be configuring the interface between Oracle Utilities Work and Asset Management and your organization’s general ledger application.

Rule Style (Second Unlabeled Field) - There are two basic ‘styles’ of Business Rule:

Parameter - Business Rules that govern processing such as defining how long a specific document should “age” before being purged or archived.

List - Business Rules that 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? - As new functionality is added to the system, business rules must be changed or modified. While we try to ensure that these changes will not negatively affect users, it is not always possible to keep modifications from having an impact on your business settings. 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.

A check in the Limit? check box indicates that the Business Rule will not be updated by installation of new release.

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" - Only the upper section of the Business Rule window remains constant from Business Rule to Business Rule. The lower section, which contains the rule's "keys" varies greatly. For more on the keys, see the individual Business Rule.

How to Set a Rule Key

Once the Rule header information is saved, you may enter Rule "Key" information per that Rule's instructions.

Rule Key and the first 3 Key Value columns have the maximum entry length allowed (up to 30 characters). Key Values 4 to 7 hold up to 500 characters each. To display additional Key Values, place your cursor directly over the column and enter a label. When you save the change, the column is automatically displayed. To remove it, simply clear the column title and save again.

The module includes the following view:

Rule Key Configuration

Through the Rule Key Configuration option, custom lists of values are attached to Key columns to control entry. This information is maintained by Oracle Utilities Work and Asset Management unless specifically noted otherwise.



Rule Key Configuration view

How to Edit a Business Rule

Complete the following procedure if at any point changes need to be made to the initial setup of your Business Rules.

Once business rules have been set with the help of Oracle Utilities Work and Asset Management business analysts, 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.

1. Open the business rule that you want to edit.
2. Make the necessary changes.

Generally, only the rule key settings and descriptions can be modified. You can also check or uncheck the Limit? check box.

3. Click the Save button to save changes or click the Cancel button to leave the rule unaltered.

Chapter 9

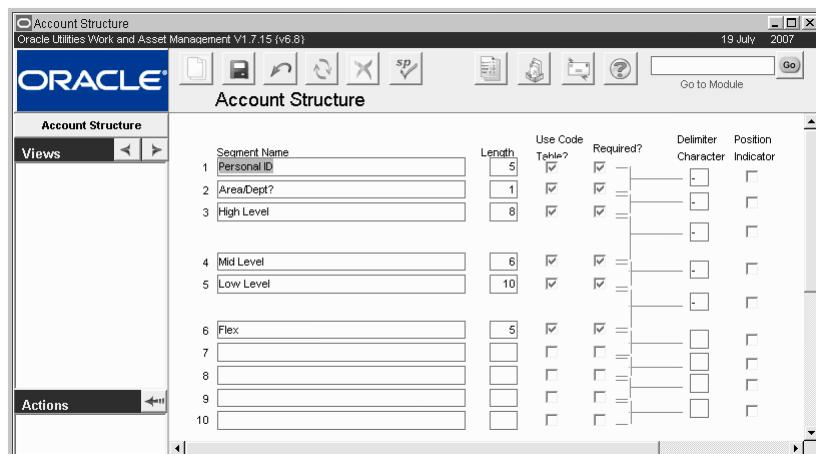
Account Structure

Using the Account Structure module, you can define what your company's account structure looks like. Once you have defined the structure the system displays any Account Number fields using the defined structure; displaying and maintaining Account information with your organization's specific account structure.

Careful consideration should be given before changing the Accounting Structure once it has been established because you also have to modify all associated data and any interfaces that use your Account Numbers.

Account Structure Records

Use the Account Structure module to define the names for each segment of your account numbers as well as the characteristics of each segment. These names are used by the system within the Account module of the Resource subsystem so that the labels use your organization's naming conventions.



Segment Name	Length	Use Code	Required?	Delimiter Character	Position Indicator
1 Personal ID	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
2 Area/Dept?	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	=	
3 High Level	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	=	
4 Mid Level	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	=	
5 Low Level	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	=	
6 Flex	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	=	
7		<input type="checkbox"/>	<input type="checkbox"/>	=	
8		<input type="checkbox"/>	<input type="checkbox"/>	=	
9		<input type="checkbox"/>	<input type="checkbox"/>	=	
10		<input type="checkbox"/>	<input type="checkbox"/>	=	

Account Structure record

The following fields are included:

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.

The lines between the Required check boxes and the Delimiter Character field do not represent anything and should be ignored.

Required - Selecting the Required check box indicates that the segment must be entered.

Delimiter Character and check box - You can use the Delimiter field to determine what kind of character that the system will show between segments of the account number. Selecting the 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.

Chapter 10

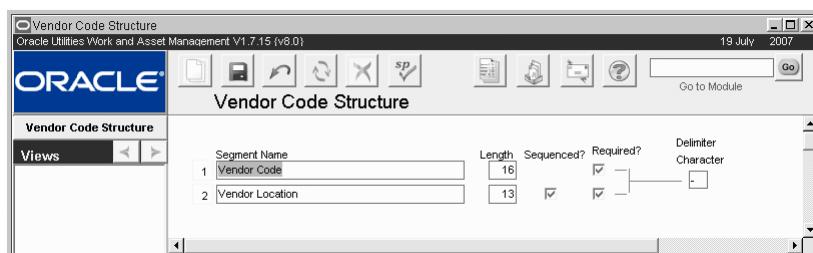
Vendor Code Structure

You can customize vendor codes and determine how they are handled throughout the system. Many organizations work with vendors that operate from several sites, and have found it useful to be able to manage these sites within the system as separate Vendor records. The system includes functionality that allows you to establish several location codes for a single vendor and track costs and performance by individual location as well as by overall vendor for all locations.

Vendor Code Structure Records

Use the Vendor Code Structure module to define how Vendor Codes appear in the Vendor module of the Purchasing subsystem. The system displays all Vendor Code fields according to the defined structure.

Vendor Codes can be structured in either one or two segments. You can determine the segment names, the segment lengths (not greater than 30 characters), whether the segments are required, whether the second segment should be sequenced, and what the delimiter would be to separate the two segments.



Vendor Code Structure record

The following fields are included:

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 recommended 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.

The lines between the Required check boxes and the Delimiter Character field do not represent anything and should be ignored.

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.

How to Create Your Vendor Code Structure

1. Open the Vendor Code Structure module.
2. Set the parameters according to the [field descriptions](#).
3. Click Save.

Summary

The system uses the segment names and other values established in this module to determine how vendor codes are presented throughout the system, and whether or not location codes are also used to define the vendor code. This functionality can be extremely useful if your organization frequently works with vendors that operate out of multiple locations and you need to track these vendor locations separately for shipping, billing, and auditing purposes. Please refer to the Purchasing guide chapter on the Vendor module for more information.

If your organization does not need to manage multiple vendor locations you can leave segment 2 blank. However, you might want to set up segment 2 anyway to provide added flexibility in case you decide to use this functionality later.

Chapter 11

Buyer

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

Buyer Records

The Buyers module does not have a Results of Search window because all of the Buyer records are displayed in one window on separate lines.

Buyer	Buyer Name	Stores Reorder	Update App PO	Update Issued PO
ILB	MAIN BROWN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JCL	John Clow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CCK	CKRAFT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RVK	RVEKSLER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buyer record

The following fields are included:

Buyer - Each Buyer has a unique Buyer Code.

Buyer Name - When you select a Username, the system returns the individual's name. This name will show on Purchase Orders and other possible external documents.

Username - 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.

Stores Reorder - Check the Stores Reorder box to authorize a user to review and authorize stores reorders for items that require approval (rather than automatic reordering).

Buyers with these authorities have complete power over making changes to Purchase Orders after they have been approved. Regardless of their approval authority, they can make changes that affect price and quantity.

Update Approved PO - When this box is checked, the buyer can modify Purchase Orders in Approved status. Without this authority buyers can only modify Purchase Orders in Created or Pending Approval status.

Update Issued PO - When this box is checked, buyers can update Purchase Orders in Issued status by first changing the record to Updating status. When this box is not checked, buyers can only modify Purchase Orders in Created or Pending Approval status and do not see Updating status as an option.

Phone Number and Fax Number - The entered Username returns the Phone and Fax Numbers, both of which may be overwritten.

How to Create a Buyer

1. Enter a Buyer Code.

You can use a numerical or alphabetical sequence of three characters for the code. The user's initials or another intuitive code is recommended.

This code is used for fields on records such as Purchase Orders. When you finish enrolling the user, the system copies information to a new record in the Buyers Module in the Administration subsystem. The Buyers module will make the data available to lists of values wherever the Buyer Code is used.

- 2. Enter the user's name as it should appear on purchase documents.**
- 3. Select whether the user can order stores replenishment and change approved purchase orders and other purchase documents.**
- 4. Enter Phone and Fax.**
These are the contact numbers vendors and others will use to reach the user.
- 5. Click the Next button.**

How to Make a User a Buyer

1. Open the Buyer module

The Buyer module is in the Administration subsystem. The Buyers module does not have a Results of Search window and all possible Buyer records are displayed in one window.

- 2. Click the New icon.**
The system creates a new blank Buyer record.
- 3. Enter a Buyer Code.**
- 4. Enter the buyer's Name.**
This name will show on Purchase Orders and other possible external documents.
- 5. Select a username from the list of values.**
This list is controlled by the Employee module. The system provides contact information for the username in the fields at the bottom of the window.
- 6. Select check boxes as appropriate.**
Please review [Field Descriptions](#) for more information.
- 7. Click the Save icon.**

How to Authorize a Buyer to Do Stores Replenishment

- 1. Open the appropriate Buyer record.**

The Buyer module is in the Administration subsystem. The Buyers module does not have a Results of Search window and all possible Buyer records are displayed in one window.

2. Check the Stores Reorder check box.

When this check box, is checked the buyer can review and approve stores reorders for items that require approval (rather than automatic reordering).

3. Click the Save icon.

How to Authorize a Buyer to Modify Approved Purchase Orders

1. Open the appropriate Buyer record.

The Buyer module is in the Administration subsystem. The Buyers module does not have a Results of Search window and all possible Buyer records are displayed in one window.

2. Check the Update Approved Purchase Order check box.

When this check box is checked, the buyer can modify Purchase Orders in Approved status.

3. Click the Save icon.

How to Authorize a Buyer to Update Issued Purchase Orders

1. Open the appropriate Buyer record.

2. Check the Update Issued Purchase Order check box.

When this check box is checked, the buyer can modify Purchase Orders in Issued status.

3. Click the Save icon.

Chapter 12

User-Defined Fields

Since every industry and organization has specialized information requirements that are unique and therefore not appropriate to be included in basic Oracle Utilities Work and Asset Management functionality, the system allows organizations to create and name their own fields on certain windows. These fields are called user-defined fields (UDFs) and can be added to various windows throughout the system.

At its 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 and you can also customize the lists of values you use for your user defined fields with enhancement help from customer support.

You can also customize the lists of values you use for your user-defined fields with enhancement help from Oracle Utilities Work and Asset Management.

The placement, labeling and other behavior of your organization's user-defined fields are all controlled in the User-Defined Fields module. You can determine such characteristics as:

1. Which windows will show user-defined fields,
2. How each field will be labeled,
3. Whether the field has an associated list of values.

Note: 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.

Setting Up User Defined Fields

Setting up user defined fields is a three-step process:

1. [Determine that a Table supports User Defined Fields](#)
2. [Create a User Defined Fields Record](#)
3. [Setup Table Definition Information for User Defined 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

Determining Which Windows Show UDFs

Before you begin creating user defined fields, you should spend some time determining what UDF's you need to add, the names of the windows you want to add them to, and whether or not those windows support UDFs.

The various windows that you see when using the system are graphical representations of the actual underlying base tables that contain your organization's information. To add a UDF, you must know the name of the base table (rather than the title on the window) where you want the UDF to appear. The names of most base tables are similar to the titles on the windows that represent them. For example, the base table name for a Vendor record is SA_VENDOR.

If you are unsure of the base table name, open the window where you want to add a UDF and select About Item from the Help menu, then read the base table name from the pop up window.

Each eligible base table already includes ten empty and unlabeled fields (actually columns in the table) called Attribute1, Attribute2, etc. When you create a UDF, you are actually defining how the column on the table will behave and how it will be presented in the appropriate window. It is fairly easy to determine which tables can have user defined fields by checking in the Oracle Data Dictionary module.

How 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. Press F8.

The system lists all of the tables that contain Attribute columns. The list will include existing Custom views (beginning 'CV_') and interfaces ('SAIF_') in addition to tables ('SA_').

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.

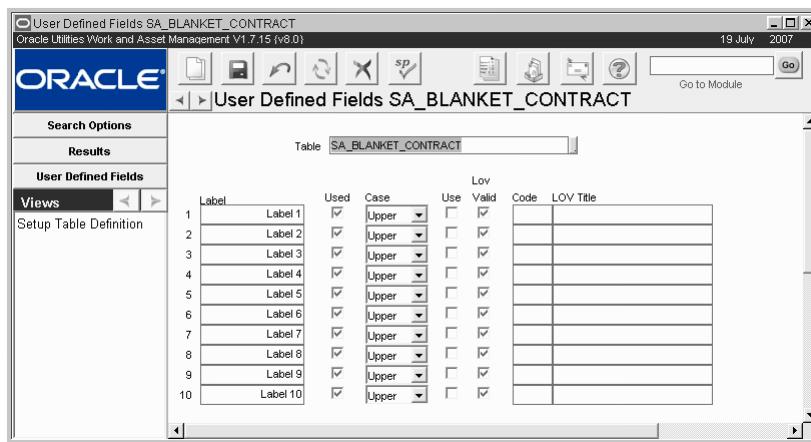


Table Definition view

The following fields are included:

If you are unsure of the name of the table, you can check it by opening the window on which you want the user-defined field(s), then placing the cursor in a field and opening About Item from the Help menu. The About Item window opens listing the Base Table.

Table - When creating a new record, select the Table Name from the list of values first. The list is controlled by an internal Oracle table that lists all system tables.

The Table field indicates which table (window) will contain the data for the user-defined field. The name of the table will be similar to the title of the window that will show the field. This field has an associated list of values controlled by an internal Oracle table that lists all system tables.

Label - Enter the name of the field as you want it to appear on the window. The maximum number of characters in a label is fifteen. The system displays the label exactly as you enter it, using any capitalization that you indicate. For example, if you enter 'aZa' here, the label on the window will be 'aZa'.

Used - A check in the Used check box indicates that the field should be displayed. If you are setting up a new user-defined field but do not want to display it until it is complete and has been tested in controlled conditions, you can use the displayed check box to turn the user-defined field off and on while working with it.

Case - The Case field determines which capitalization scheme the system enforces when users enter information into the field. Options are:

Upper - The system automatically changes the entry to UPPER case.

Lower - The system automatically changes the entry to lower case.

Mixed - The system accepts the information as entered.

Use List of Values - Use this check box to associate the field with a list of values.

Make sure to set up a list of values and associate this field to a Code Table listed in the Code Table and Codes module.

List of Values Validation - Place a check in this check box if you want the system to validate the information the users enter against the list of values. If this is checked, the system only allows information that exactly matches a selection from the list of values.

Code Table - This field contains the number for the Code Table that will be used when the user clicks on the list of values button. The field itself has an associated list of values controlled by the Code Table and Codes module.

Note: Make sure that the length of the field is enough to hold the codes in your Code Table. The length of the field is defined in the Table Definition view.

List of Values Title - Enter the text that will show at the top of the list of values window here. The system appends the Code Table number to your title. This field will accept a title of up to 80 characters but titles of more than about 50 characters will force the Code Table number off the title bar, hiding the number. If you then need to add a new code to the Code Table, it may be difficult to determine which table to edit.

After you create a new table and save it, the system displays it at the bottom of the appropriate window and also automatically includes it at the bottom of the related Search Options window as a searchable field. The field locations are limited to the bottom of the windows in two columns, and the lowest Attribute number takes the upper left spot relative to the other user-defined fields.

For example:

Attribute2Attribute7

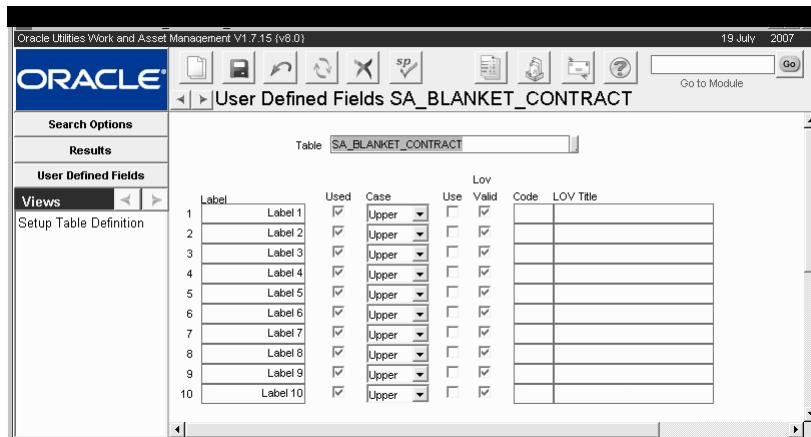
Attribute8Attribute10.

How to Create a User Defined Field Record

1. Open the User Defined Field module.
2. Click the New icon to insert a record.
3. Fill in the fields according to the [field descriptions](#).
4. Enter list of values information if desired.

Make sure that the length of the field is enough to hold the codes in your code table. The length of the field is defined in the Table Definition view.

5. Click Save.



After you save the record, the system displays the UDF at the bottom of the appropriate window and also automatically includes it at the bottom of the related Search Options

window as a searchable field. The field locations are limited to the bottom of the windows in two columns, and the lowest Attribute number takes the upper left position.

User Defined Fields Module Views

The module includes the following:

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 make sure that the database has been prepared to accommodate the new or modified fields.

Setting up table definition information is a two-step process:

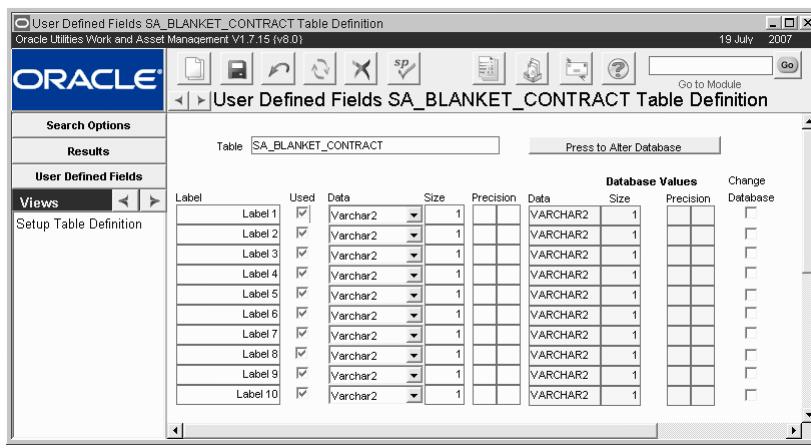
Define the Data Characteristics for UDFs

The Setup Table Definition view enables you to define the data characteristics of the fields and how they behave within the database structures and processing of the application.

Update the Table with UDF information

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. After making sure that the database has been prepared to accommodate the new or modified fields, you can update the table with the new UDF information.

The window includes fields to make these refinements as well as a display that confirms your selections. You can change the column characteristics as many times as you need to, however if you change a column after data has been entered into it, you may make that data inaccessible.



Setup Table Definition view

Label - The left most column contains the label for the field. The system provides this information from the User-Defined Fields Setup window.

Used - The Used check box indicates whether the user-defined field is actually in use and showing on the appropriate window. The system provides this information from the User-Defined Fields Setup window.

Data - The Data field indicates the type of data that the field will hold. Options are:

Varchar2 - The Varchar2 data type allows you to enter both numbers and characters but numbers combined with letters cannot be manipulated using numeric functions (addition, subtraction, etc.). However, if the entered data only includes numbers, Oracle will automatically convert the data to numeric data.

The maximum length for Varchar2 data is 2000 characters but due to the constraints on window size, only 27 characters will be displayed at a time.

Date - The calendar feature is available for user-defined fields with the date data type. The date data type uses a Varchar2 data type with processing to mimic the date data type. This can affect how Open APIs and interfaces must be programmed. Your database administrator can consult with Oracle Utilities Work and Asset Management, to determine how to best configure the data type.

The optimum length for date data type fields is 11 to accommodate the longest available date format (DD-MMM-YYYY).

Number - The Number data type allows you to enter numbers that can be manipulated using numeric functions such as addition and subtraction. If the data type is numeric, the system does not allow users to enter non-number data.

Size - This field displays the number of characters the column will hold.

Note: If the user defined field is associated with a list of values make sure that the field is long enough to contain the longest code in the Code Table. The maximum display length for a user-defined field is about twenty-seven characters. The column can be wider than the maximum display width of the field, but when the length of the data exceeds the field display, it will scroll out of the field. This information is still recorded.

Precision - Using the two Precision fields you can determine how many digits will be allowed to either side of the decimal point for Number data types.

Change Database - The Change Database check box indicates whether the table characteristics should be updated when you click the Press to Alter Database button. The checks are erased after the columns have been altered.

Press to Alter Database - Clicking the Press to Alter Database button signals the system to restructure the columns for all the user-defined fields that have checks in the corresponding Change Database check boxes. The checks are erased after the columns have been altered.

After you enter the table characteristics and save the record, the system saves the new characteristics in the record but has not yet changed the actual table. This avoids changing the table characteristics unnecessarily.

How to Define the Data Characteristics for UDFs

1. **Open the appropriate UDF record.**

The User Defined Fields module is in the Administration subsystem.

2. **Select Setup Table Definition from the Views list.**

A User Defined Field Table Definition window opens.

3. **Select the Data type.**

4. **Enter the number of characters (Size) the field can hold.**

The optimum length for Date data type fields is 11 to accommodate the longest available date format (DD-MMM-YYYY).

5. **Indicate the decimal places to be allowed, if appropriate.**

This step is only for fields using the Number data type. The two Precision fields indicate the maximum number of digits to either side of the decimal point.

6. Repeat steps 3 - 5 for each UDF.
7. Click the Save icon.

The system saves the new characteristics in the record but has not yet changed the actual table. This avoids changing the table characteristics unnecessarily. To update the table, see How to Update a Table with UDF Information.

How to Update a Table with User-Defined Field Information

Since altering columns is a function of Oracle and not Oracle Utilities Work and Asset Management, all of the Oracle DDL processing rules are in effect.

1. Open the appropriate UDF record.
The User-Defined Field module is in the Administration subsystem.
2. Select Setup Table Definition from the Views list.
3. Review the information for each UDF.
You want to ensure there are no conflicts between Code Tables and size, Code Tables and Data Type, etc. This may require referring to both the User-Defined Field window and the Setup Table Definition window.
4. Place a check in the appropriate Change Database check boxes.
Do this only for those user-defined fields that have completely defined characteristics that have no definition conflicts and which need to be updated.
5. Click Save.
The system saves the changes and prepares to change the table structures.
6. Select Recompile Database Objects from the Actions list.
The system changes the characteristics of the columns in the database and erases the checks from the Change Database check boxes.

Note: To promote ease of use for your users, you should generally maintain consistent labels from the sending user-defined field to the receiving user-defined field.

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. Please refer to the configuration guide section on the [UDFs - Auto Copy Across Modules Rule](#) for specific information on which modules need special consideration with regard to UDFs.

User-Defined Fields and Custom Lists of Values

Caution: Creating special lists of values requires knowledge about SQL select statements. You should not attempt this without SQL experience.

Setting up a custom (or 'Special') list of values usually requires retrieving the information required for the list of values, Group and Group Record fields from the actual programming code. To get this information, your Database Administrator (DBA) (or another representative) must contact Oracle Utilities Work and Asset Management Customer Support and ask for help with a custom enhancement to create the query that creates the list of values.

Occasionally, the information required for the list of values, Group and Record Group fields can be anticipated without referring to the programming code. This is the case with custom lists of values for user-defined fields that are positioned on the Header and Selection Forms – this may also work for user-defined fields on certain other forms as well.

User-defined field special lists of values can only be created to model a Code Table-based list of values, so they can only display columns for the Code and the Description.

How to Create a Special List of Values for a User-Defined Field

Creating a special list of values for a user defined field is a two step process.

1. Take note of the Field, Form and Block information for the UDF.
2. Define the special list of values processing.
3. Add the special list of values to the UDF.

How to Retrieve the Field, Form, and Block Information for a User-Defined Field

Set up the user-defined field without assigning the list of values so that the user-defined field displays where you want it.

1. Open the window with the new UDF.
2. Place the cursor in the UDF.
3. Select About Item from the help menu.
4. Record the Form, Block and field names.

How to Define Special List of Values Processing

User-defined field special lists of values can only be created to model a Code Table-based list of values, so they can only display columns for the Code and the Description.

1. Select the appropriate form in the Modules Administration - Forms module.
2. Select Special Lists of Values from the Views list.
The About Special list of values window opens.
3. Click New.
4. Enter the list of values name.
The information for this field is the name of the table column followed by an underscore followed by the Form name (for example “ATTRIBUTE1_HEADER”). You may want to copy (CTRL+C) this information to paste (CTRL+V) in the Group and Record Group fields.
If you want to include the user-defined field with the list of values on the Search Options screen you must create a second Form Lists of Values record with SELECTION as the block (e.g. “ATTRIBUTE1_SELECTION”).
5. Enter a Title for the list of values.
This is the title that will display at the top of the list window.
6. Enter the Group and Record Group.
The information that you enter in these fields will be the same as what you entered in the List of Values field.
7. Enter a Description of what the Query does.
8. Enter the Query that will run when the List of Values button is clicked.
The syntax for the query is a standard SQL select statement. For more complex queries joining tables, etc. you may need to consult with Oracle Utilities Work and Asset Management for help.
9. Click Save.

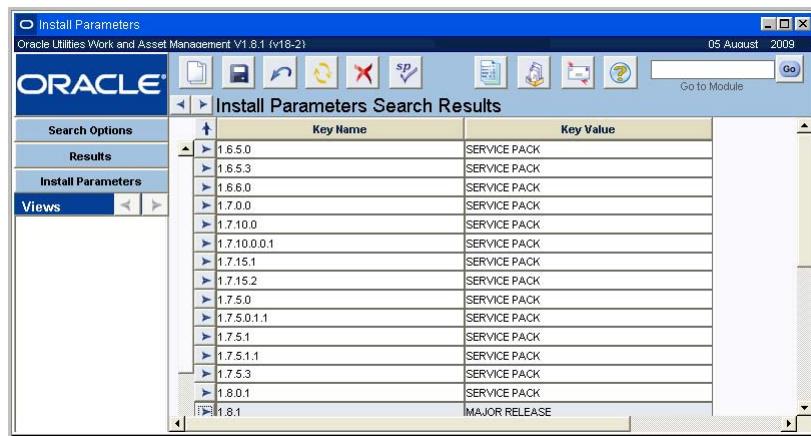
How to Add a Special List of Values to a User-Defined Field

1. Open the appropriate UDF record.
2. Indicate if you want a list of values associated to the UDF.
3. Indicate if you want the UDF validated against the list of values.
4. Click Save.

Chapter 13

Installation Parameters

The installation parameters module tracks applied installations for auditing purposes. It also allows system administrators to control various aspects of the system and to choose functionality settings. Please refer to the [Configuration Guide](#) for more information on specific installation parameters.



Chapter 14

Configuration Guide

The Configuration Guide module is used to help System Administrators, Database Administrators, and Business Analysts keep track of which parts of the system have been configured as the system is being installed. The module functions in the same way as a [standard transaction log](#).

Chapter 15

Approval Limit

Approval Titles are used throughout the system to determine who can give approval for various kinds of records such as Purchase Orders, Requisitions, Work Orders and Requests, etc. Using the Approval Limits module in the Administrative subsystem, you can create approval titles, authorize users to use approval titles, and set approval limits for specific document types.

The Approval authority for a given user can also be set when the user is initially entered in the system. Please see the section on User Enrollment for more information.

Approval Limit Records

A user 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. If a user is listed under more than one approval title, the system will use the title with the highest limit when approving a document.

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.

Emp No	Username	Alert?	Active?	Document	Limit
100	RBEELER	<input type="checkbox"/>	<input checked="" type="checkbox"/>	AVOVERRIDE	2,500.00
101	IBROWN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CHINGASSET	2,500.00
		<input type="checkbox"/>	<input type="checkbox"/>	CHINGSTORM	2,500.00
		<input type="checkbox"/>	<input type="checkbox"/>	CO	2,500.00
		<input type="checkbox"/>	<input type="checkbox"/>	CONTIME	5,000.00
		<input type="checkbox"/>	<input type="checkbox"/>	PO	5,000.00
		<input type="checkbox"/>	<input type="checkbox"/>	PROC	1.00
		<input type="checkbox"/>	<input type="checkbox"/>	REQSTN	5,000.00
		<input type="checkbox"/>	<input type="checkbox"/>	WFO	5,000.00
		<input type="checkbox"/>	<input type="checkbox"/>	WVRKREQ	5,000.00

Approval Limit record

The Approval window is divided into three sections. The upper section contains the title code, description, and type, and is where you create an approval title. The lower left section of the Approval window contains authorization information, and is where you assign the approval title to users. The lower right section of the Approval window contains the Document Limits

section, and is where you identify approval limits for each associated document type for an approval title.

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.

The following fields are included:

Approval Title and Description - The Approval Title field indicates the title that will be displayed on any Approval. The first few words of the description are displayed.

Type - There are Three types of Approval titles:

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 given the Approval Title. The field has an associated list of values 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. 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 - Timesheets and work requests have no dollar value associated with approvals. So any dollar value (over .01) may be entered in the Limit column for time and work request documents.

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.

If the total cost on a record is higher than the limit, the Approval Title will not be able to give final Approval and will have to pass the record to a Next Approver with a higher approval limit.

How to Create an Approval Title

1. **Open the Approval Limit module under Approvals and Routes in the Administration subsystem.**
2. **Click New.**
A new Approval Limit record opens.
3. **Enter an Approval Title Code.**
This code should be a few characters long and relatively descriptive of the approver's function.
4. **Enter a description.**
The title description that you enter should provide more detail of what the approval title does. The first few words of the description are displayed on Approval records with the code.
5. **Select an Approval Type from the list of values.**
There are three types of approval titles:

M - Maintenance Approver

P - Production Approver

B - Both Maintenance and Production Approver

6. Click Save.

After saving, you can fill in the bottom portion of the window to assign approval titles to users and set document limits.

How to Assign an Approval Title to an Employee in the Approval Title Module

- 1. Open the appropriate Approval record.**
- 2. Place the cursor in a blank Employee No field.**
In order to assign an approval title to a user, the user must already have a user profile. If the user profile that you need is not created leave the lower left section blank. Then assign approval titles to users later as you create their user profile.
- 3. Click the New icon.**
The system opens a new blank record with the Active check box checked.
- 4. Select the Employee Number from the list of values.**
The system supplies the username. This list is controlled by the Employee module in the Resource subsystem.
- 5. Check the Alert? check box if appropriate.**
If this box is checked, the user will be alerted whenever the Approval Title is entered as a Next Approver.
- 6. Click the Save icon.**
The next step is to add document and limits to the approval title.

How to Add a Document and Limit to an Approval Title

- 1. Open the appropriate Approval Title record.**
Note that the Results of Search window shows both the approval title and users, so that you may see multiple instances of the same Approval record.
- 2. Place the cursor in a Document field.**
- 3. Click New.**
- 4. Select the Document type from the list of values.**
- 5. Enter the highest dollar amount that the approval title can approve for that document.**
- 6. Click Save.**

How to Disable User's Approval Title

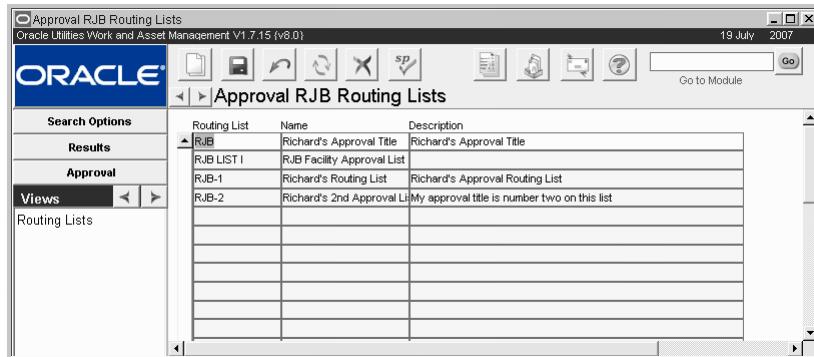
- 1. Open the appropriate Approval record.**
Approval Titles are in the Approval Limit module in the Administration subsystem. Note that the Results of Search window shows both the Approval Title and users, so that you can see multiple instances of the same Approval record.
- 2. Find the username for the user.**
- 3. Uncheck the Active check box.**
This will remove the user from this Approval Title, without deleting the record.
- 4. Click the Save icon.**

Approval Limit Views

The module includes the following view:

Routing Lists

The Routing List view shows a listing of all of the Routing Lists that the Approval Title appears on. You can double click the Routing List ID to open the Routing List module.



Routing List view

Approval Structures

Approval titles can be maintained so that you do not have to add or delete employees as backups when the primary approver is absent. Administrators can add the employee number of the backup approver to the appropriate approval title without checking the Alert? and Active? boxes. This way, the backup employee is not authorized to use the approval title and will not receive Alerts. If the backup approver is needed, the Alert? and Active? boxes can be checked to activate their approval authority.

Chapter 16

Routing List

Many records, if issued, will eventually lead to the release of funds from your organization. Since they usually have a financial impact, it may sometimes be necessary to obtain the approval of a few or several members of your organization who have the authority to release funds. Approval routing lists provide an easy method of delivering records to each person who must either review or approve records.

Routing List Records

Routing lists are created by accumulating a list of approval titles that have already been established in the Approval Limit module. Each approval title can include one or many users who are authorized to approve the document types indicated on the approval title. The route should be set in a specific order as the system sends alerts to the approval title in the order that they are listed on the route. The second approval title does not receive an alert until the first approval title has responded, and so on.

Even if you only have two approval titles on the route, it is possible that you could have many more than two actual approvers. When a record needs to be approved the system sends an alert to ALL of the users that share the approval title listed on the route. Routing lists are only used on certain types of records in the system. Other records use a next approver.

The Approval Routing Business Rule determines how the system routes Alerts for documents requiring approval.

Title	Description	Sequence	Mandatory	Notify Only
RJB	Richard's Approval Title	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ILBI	Approval Title for the ILB facility	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SLC	Shauna's approval title	15	<input type="checkbox"/>	<input type="checkbox"/>

Routing List record

The following fields are included:

Routing List - You must enter a unique Routing List ID. The Routing List ID identifies the Routing List elsewhere in the system.

Routing Name - The Routing Name helps to identify the Route. It is usually a required field. The Routing Name, together with the Routing List ID, appears on the list of values used to select Routing Lists for approvable records.

Description - You can add additional information to help identify the Routing List. Since a portion of the Description text appears on the Search Results list, the information that you enter in this field can assist in selecting the Route from a Search Results list.

Approval Title - Select the Approval Titles that you want to add to the Routing List. Before they can be selected, Approval Titles must be created and saved in the Approval Limits module.

Sequence - The sequence number indicates the order in which Approval Titles will be receive approval Alerts when a document is routed for approval. The second Approval Title does not receive an alert until the first Approval Title has responded, and so on. If more than one Approval Title should receive alerts at the same time, the same Sequence number should be assigned to those titles. If you enter an Approval Title out of sequence, click the refresh icon to resort the order.

As you enter Approval Titles, the system enters default sequence numbers in increments of 5. This makes it easier to insert additional Approval Titles into the sequence later.

The sequence number also determines the order of the Approval Titles on this screen. If you change the sequence, or insert new Approval Title, you can click the Refresh icon to display by the new sequence. If you are inserting a new sequence number into a route that is in progress, you must insert a number that has not already been processed for the route.

Notify Only Approval Titles receive their alerts when the routing process first begins, regardless of their sequence number.

Approval Titles cannot be marked as both Mandatory and Notify Only, and not all Approval Titles on the list cannot be marked as Notify Only. If neither is checked, the Approval Title has the option to respond or not respond.

Mandatory - Mandatory Approval Titles must agree with a document before it can be approved. If a Mandatory Approval Title disagrees with a document, the approval process stops and the document is not approved.

Approval Titles cannot be both Mandatory and Notify Only. If one check box is marked and you want to change to the other, you must first remove the existing check.

Notify Only - Notify Only Approval Titles are alerted that the document is under review but no response is necessary. All Notify Only reviewers receive their alerts when the routing process begins.

All Approval Titles on the Routing List cannot be marked as Notify Only. If all approval Titles on the route are designated Notify Only, and the record is put to Pending Approval status, the system displays an error message saying the current route does not have sufficient dollar limit to approve the request.

How to Create an Approval Routing List

1. Open the Routing List module.

The Routing List module is in the Administration subsystem, on the Approvals and Routes menu.

2. Click New.

3. Enter a unique Routing List ID and a Routing Name.

4. Click Save.

5. Select the first Approval Title from the list of values.

As you select titles, the system enters sequence numbers in increments of 5. You can change these numbers if necessary, but retaining an interval between the numbers makes it easier to insert new Approval Titles later.

6. **Mark the appropriate check box if the Approval Title is a Mandatory or Notify Only approver.**

You do not have to mark either check box, but you cannot mark both.

7. **Click Save.**

8. **Repeat steps 5 through 7 to add the next Approval Title.**

Continue to add Approval Titles until all have been added. Adjust the sequence numbers as necessary to maintain the order the system should use when sending alerts to approvers.

Setting Default Approval Routes for Users

Users can also add default approval routes to their profiles on their own.

If necessary, users can modify the Approval Route field on the record before they save it.

How to Assign a Default Approval Route to an Employee

1. Open the employee's User Profile record under System Configuration in the Administration subsystem.

2. Select Default Approval Routes from the Views list.

3. Select a Document Type from the list of values.

4. Select a Default Route from the list of values for each Document Type.

5. Repeat Steps 3 and 4 for each document type.

Even if you want to use the same approval route for each document type, you must create a separate entry for each document type.

6. Click Save.

Routing List Views

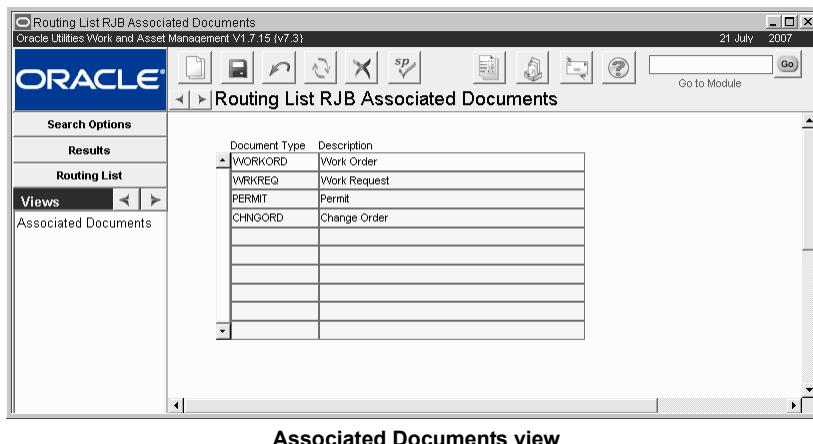
The module includes the following view:

Associated Documents

Associating a routing list with specific document types can help insure that users choose a suitable list when requesting approval.

If this functionality is turned on, you must select the document types appropriate for the routing list in the Associated Documents view of the Routing List module. Only lists associated with the document type then appear on the list of values for the Approval Route field in modules using routing lists for approval processing.

The Associated Documents view is available only when the Approval Routing business rule is set to use associated documents. Otherwise all routing lists apply to all document types.



Routing Lists and the Approval Process

Once a Routing List has been created in the Routing List module, you can select it from approvable records to specify how alerts should be routed during the approval process. When the record is placed in Pending Approval status, the system sends alerts to all approvers with the first Approval Titles on the list (and to all Notify Only approvers). Depending on settings in their User Profiles, approvers will receive alerts on their home page, by e-mail, or both.

When an approver clicks on an approval Alert on their home page, the Approval and Routing Wizard opens where they can approve the document (if they have sufficient Approval Limit) or agree or disagree with the record.

When an approver receives an alert by e-mail they can follow a link to the Approval Portal where they can approve, agree, or disagree without having to log in.

Once someone with the first Approval Title agrees with the record, the system sends alerts to everyone with the next Approval Title specified on the Routing List. This process continues until all Approval Titles on the list have reviewed the record and at least one approver with sufficient Approval Limit has approved. When these conditions are met, the system changes the status of the document to Approved.

If all Approvers agree with the document, but none have sufficient Approval Limit, the system sends the originator an Alert saying the approval process has stopped but the record is not yet approved. In this case, the requestor must add another Approval Title to the Routing list that does have sufficient Approval Limit to approve.

If a mandatory approver disagrees, the person who originated the document will receive an alert saying the approval process has stopped. They can then review the Approval Log view to see what reason was given for the disagreement.

If the record needs to be updated after the Approval Routing process has begun, you must change the status from Pending Approval to Created. This removes all outstanding approval alerts and clears the Approval Routing List view. Any decision already made remains in the Approval Log.

You can also specify a default Routing List in your User Profile so that the system automatically enters that route when you create documents. You can specify a different default for each type of document that uses Approval Routes. If necessary, you can also change the route that is defaulted on the document before you save it.

PIN Processing and the Approval Process

As a further security check in the approval routing process, your organization can require approvers to enter a PIN (personal identification number) whenever they enter an approval decision. Please refer to [PIN Processing](#) for more information.

Chapter 17

Report Administration

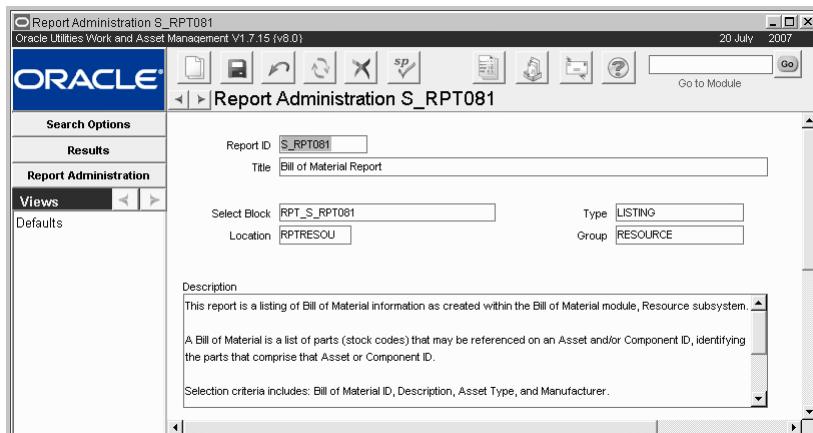
The Report Administration module is used to access and run existing reports as well as to add custom reports.

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.

For a detailed description of each individual report, refer to the [Reports](#) appendix.

Report Administration Records

If you want to modify an existing Report Administration record, you can only modify the Title, Group, and Description fields. Changing any other field could cause the report not to work.



Report Administration record

The following fields are included:

Report ID - This is the report's unique Identification number. It cannot be changed.

Title - The text in this field will be displayed on the report as a title.

Select Block and Location - Block and Location are technical information used to point the application to the correct code when running the report. The list of values for the Location field is controlled by Code Table 95 in the Code Table and Codes module of the Administration subsystem.

Note that the Location indicates the report form in which the report Selection is defined and the Select Block indicates which block within that form holds that report's Selection. This

information is used to retrieve a report “front end” – the Selection window for entering search criteria. If there is no front-end available, the report will simply run using your predefined search criteria. If this information is modified incorrectly, the report may not run.

Type and Group - The Type and Group fields classify the report for easy user retrieval. The list of values for the Type and Group fields are controlled by Code Tables 97 and 96, respectively, in the Code Table and Codes module of the Administration subsystem.

Description - In the Description field you can note details about the report such as selection criteria, which modules the report takes data from, the type of information the report includes, and any other important information.

How to Run a Report

1. Open the Reports List.

You can access the Reports List by selecting Reports from the File menu or Reports List from the Actions list on the home page.

2. Highlight the desired report.

You can narrow down the Reports List to find the report you want by selecting a report Group from the list of values.

3. Select Run Report from the Actions list.

If the report has a Selection window associated with it, that Selection window opens. If this window does not open, go to step 5.

4. Enter search criteria for the report.

5. Select Run Report.

A Report Options window opens.

6. Select the desired output for the report.

The available report output options include: Screen, File, Printer, Preview, Slave Printer, or Server Batch Queue.

7. Click Run Report.

Report Output Options

When you run a report, the system opens a Report Options window, where you can select the Report output options. However, if the Reports Always Preview key in the Web Configuration business rule is set to ON, the system bypasses the options window and opens the preview automatically.

Report Output options include:

Screen - Results are displayed on screen as retrieved. Once the report is displayed, you can use your browser's controls to print or save the report. In the Web environment, the Screen and Preview options are identical.

File - The File option writes the report to a file on disk so that it can be accessed at a later time outside of the system. If you select this option the window changes to display fields where you can enter the File Name and the File Format.

You should enter the complete file path for the location where you want the system to save the Report as well as the file extension for the file format that you want the report saved as. For example, if you want the Report saved on your hard drive in a particular folder as a .pdf file, you might enter: C:\My Documents\Report1.pdf

The only options for file format are .PDF (Adobe postscript file) or .HTML (web enabled format). However, memory limitations and the potential size of HTML documents may cause

your browser may crash when running long HTML reports. To prevent problems, it is recommended that you use Adobe PDF format for long reports

Printer - The Printer option sends the report directly to the printer designated in your User Profile. If there is no printer specified in your User Profile, the report prints on the printer specified as your Windows default printer.

Preview - The Preview option displays the report on the screen as it will be printed. After you preview the report, you can use your browser's controls to print or save the report. In the Web environment, the Preview and Screen options are identical.

Slave Printer - This option is no longer used.

Server Batch Queue - This option requires custom operating system oriented coding to queue the report to print on a particular date in the future. If you select this option the window changes to display fields where you can select the printer from the List of Values and enter a date and time for the report to print.

Report Administration Views

The module includes the following views:

Defaults

Select Defaults from the Views list to set report specific output options and the modules to associate with the report.

To set report output options, select the Destination from the list of values. (The system displays only those fields that are needed according to the Destination selected). Enter any appropriate fields, such as File Name, Printer, Format, or number of Copies. The list of values associated with the Printer field is controlled by the Printer Alias Business Rule.

Chapter 18

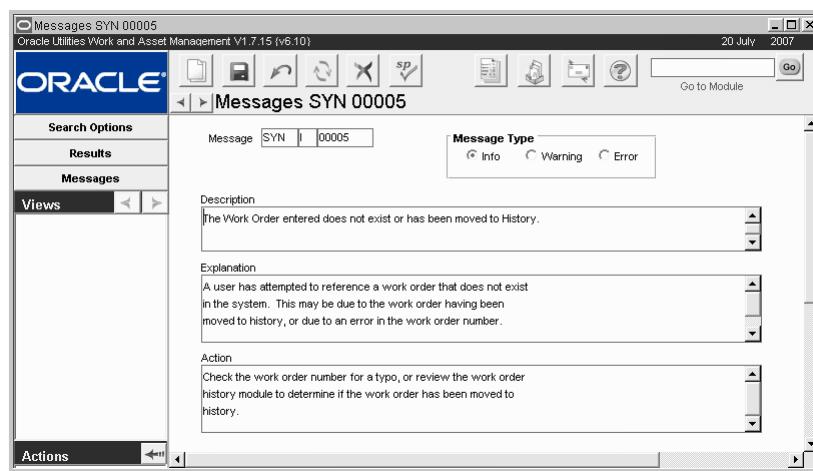
Messages

Cautionary error messages appear throughout the system when a user performs an action that is not permitted or is incorrect. Messages also appear to provide the user with information or to request information. Often these messages are issued by Oracle in reaction to circumstances having to do with Oracle database functions (a common example is errors that occur during validation and constraint checking). Other messages are provided specifically by Oracle Utilities Work and Asset Management and have to do with situations that arise within system processing. The nature of these messages varies depending on the current processing and other circumstances, but the information within the message generally includes hints about the processing involved.

Messages Records

Since messages must be associated with relevant processing, new messages generally can only be added by Oracle Utilities Work and Asset Management. However, the Messages module provides a way to modify these messages to fit your organization's business practices. They can also be tailored to fit specific business rules and changes made within the Modules Administration - Forms module of the Administration subsystem.

In most cases, you should not change the contents of the Description field (the first of the message's text). However, you may want to change the explanation and action text to fit your organization. If you want to change the wording in the description field you should contact Oracle Utilities Work and Asset Management to ensure that wording correctly describes the situation.



Messages record

The following fields are included:

Message ID Fields - The three fields next to the radio buttons labeled Message, comprise the unique ID for the message.

Each Message record is uniquely identified by the Prefix (set to "SYN" for all Message records developed by Oracle Utilities Work and Asset Management) and the message number. The Type Code (located in between) is controlled by the Message Type selected and determines the type of alert (I, W, or E). The last field is a standard sequence number.

Info - This message type indicates that the message contains useful information about processing. A common example arises when you approve a record by using the drop-down list in the Status field and the system responds by asking if you want to save the change.

Warning and Error - These message types are used when processing cannot be completed because an input condition has not been met. A common example occurs when a user does not complete all of the required fields on a record before trying to save the record. Once the user corrects the problem, the processing can be restarted.

Description - The text in this field is the message that appears in the message window when the message is triggered. It appears in both the initial message window, and in the window that opens when the user clicks on the Help button (rather than the OK button).

Explanation and Action - The text displayed in the Explanation and Action fields are what users see when they respond to the error message by clicking the Help button. The explanation tells why the error message was triggered, and the action tells them what to do to remedy the problem and avoid it in the future.

Chapter 19

Help Form

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 help open to discussion about the particular screen you are viewing when you select help. The links are established by assigning a unique 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 help topics supplied with the application. However, you can customize help without using RoboHelp or a similar help authoring system.

Caution: Before modifying the content or navigation for the online Help, you should backup the 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.

You have two options for customizing help:

1. Edit the existing .htm documents in any text editor, changing or augmenting the Oracle Utilities Work and Asset Management supplied text as appropriate. Help will then open as normal, but will display your updated text.
2. Customize the information in the Help Form to map to your own customized 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. This option is preferred because it leaves the original help text undisturbed and reduces the likelihood of your custom documents being overwritten during upgrades. In addition to customizing the Help Form, you must also create the customized help documents you want help to open and these documents must reside on the same server as the Oracle Utilities Work and Asset Management web help files.

For more information on this processing or for troubleshooting guidelines, please consult your Configuration Guide.

How to Customize the Help Form

- 1. Open the Help Form module.**

The Help Form module is in the Administration subsystem.

- 2. Search for the Form and Block combination you want to modify.**

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

- 3. Open the appropriate web help record.**

All help records have the Help Map number 9999. Records with other numbers are not used.

4. Locate the Tutorials section and enter the name of the .htm file you want help to open for this form / block combination.

For example, the Oracle Utilities Work and Asset Management.htm file names are entered in a specific three part format:

You do not have to use the same file naming convention as is used by the Oracle Utilities Work and Asset Management web help system. Any filename, such as "myPOhelp.htm," will work, as long as it resides on the same server as the Oracle Utilities Work and Asset Management WebHelp files. If you do follow this naming convention, however, your help document will open inside the standard Oracle Utilities Work and Asset Management help window.

Be aware that if you add new html pages to the help file structure, these topics will not be indexed or searchable within the delivered help. If you want to retain the searchability of the online Help, replacing the content on existing pages is the best method to use for incorporating custom content.

5. Determine how the help will open.

If you place a check in the Use as Address box, the 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 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.

6. Save the record.

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

Later, if you want to return the Help Map setting to point to the original Oracle Utilities Work and Asset Management help text, just edit the help form to point to the original Oracle Utilities Work and Asset Management file and save the record again.

Chapter 20

Modules Administration - Forms

Through the Modules Administration - Forms module, you can 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.

Default Fields

Please note that to fill in any Default Value field, you can enter one of the following values to have the system populate the record accordingly:

USERNAME (Max size = 30)
DEFAULT_NAME (Max size = 30)
USER/DEFAULT_NAME (Max size = 60)

You must make sure that the format and the max size of the field supports these values. For example, if you set these as user-defined fields, you must also configure the table definition for the SYSDATE field to be a Date format. The size of each UDF must match the max size of the default field.

If one of these default values is not appropriate for your needs, you can also enter any other value to have defaulted into the field when a new record is created. Data type and value length must also be taken into consideration when establishing defaults.

SYSDATE

You can also default SYSDATE in a system date field. For example, you could populate SYSDATE as the default for the work_required_date the Work Request module header, and the system date would be defaulted whenever a new Work Request record is created.

SYSDATE cannot be used as a default for user-defined fields.

Determining Block, Form, and Field Names

Before defining many of these settings, you need to know the exact block or field name that you want to adjust. You also need to know block and form name where the field is located. You can determine these names using the following steps.

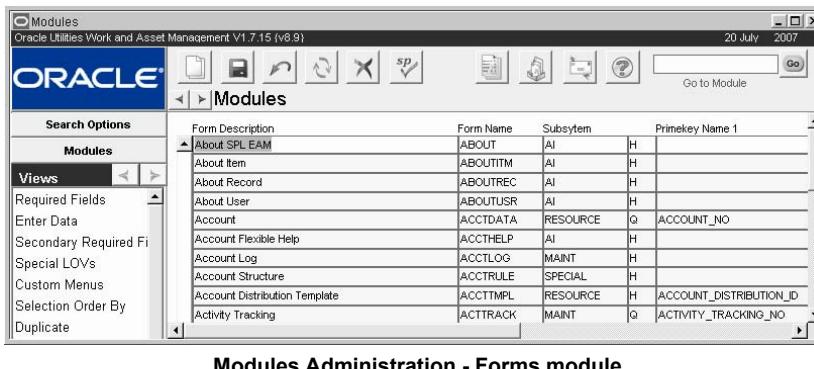
How to Determine the Block and Field Name

1. Open the module that you want to change.
2. Select the window or view where you want to set the required field.
3. Click in the field that you want to make required.
4. Select About Item from the Help menu.

5. Take note of the following information:
Form Name, Block, Field Name
6. Close the module.

Modules Administration - Forms Records

The Search Results window lists all of the modules in the system. Select the appropriate module from the list, then select the View window that you want to work with to make changes to that module.



Form Description	Form Name	Subsystem	Primekey Name 1
About SPL EAM	ABOUT	AI	H
About Item	ABOUTITM	AI	H
About Record	ABOUTREC	AI	H
About User	ABOUTUSR	AI	H
Account	ACCTDATA	RESOURCE	Q ACCOUNT_NO
Account Flexible Help	ACCTHELP	AI	H
Account Log	ACCTLOG	MAINT	H
Account Structure	ACCTRULE	SPECIAL	H
Account Distribution Template	ACCTIMPL	RESOURCE	H ACCOUNT_DISTRIBUTION_ID
Activity Tracking	ACTTRACK	MAINT	Q ACTIVITY_TRACKING_NO

Modules Administration - Forms module

Modules Administration Forms Views

The module includes the following views:

Required Fields

Fields on any given module can be marked as required, forcing users to enter a value into the field before saving the record. To help users identify which fields they must enter, the required fields are highlighted in a contrasting color during insert. If users leave a required field empty and try to save the record, a message appears listing the missing required field. You can designate fields to be required at all times, to be required only when a related field is populated, or when the record is in a particular status. Oracle Utilities Work and Asset Management sets default required fields for each module but you may want to set your own required fields to best fit your business practices.

Select Required Fields from the Views list to determine which fields on a given form should be marked as required entry. If you set a field as required, users are forced to enter a value into the field before the system will allow them to save the record.

Since fields are located within blocks on a form, you must list the Block Name before entering a list of required fields. The system presents a list of required fields for the block name that is highlighted.

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

Required Fields view

Form, Block, and Field Name - Form and Block identify the specific form and block where the field is located. Field name identifies the name of the field on the form.

Default Value - You can enter a Default Value the system will automatically insert when a new record is created. This value can be overwritten if necessary. See the section titled [Enter Data](#) for instructions on entering defaults.

Reqd - 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.

Sys - 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.

Message Field Name - Message Field Name allows you to enter text that will be displayed in the alert box presented if a user does not enter a value into the field before saving.

Secondary Required Fields

Using similar procedures as to creating Required Fields, you can also specify secondary required fields. Secondary required fields are required only if another field on the record has been populated. For example, if a blanket contract number is entered on a purchase order, the blanket contract revision number is also required. If no blanket contract is specified, the revision number is not required. The Secondary Required Fields view allows you to designate fields as required based on whether or not another field has been populated.

Secondary Required Fields view

Enter the Form, Block, Field, and first field. Then enter the Second Field that must be populated when the first field is populated.

Enter Data

You can use the Enter Data view to configure the system to automatically enter a default value in selected fields when new records are created. The default values can be changed on the created records if necessary. This view shows a summary of the fields that have already been set as required fields, but you can add additional fields that have not been set as required, if needed.

Block Name	Field Name	Req'd	Sys	Message Field Name	Default
COSTS	EXPENSE_CODE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Expense Code	
COSTS	PERIOD_MONTH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Period	
COSTS	PERIOD_YEAR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Period Year	
HEADER	ACCOUNT_SEGMENTS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Low Level	
HEADER	ACCOUNT_STATUS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Status	
NOTES	NOTE_TYPE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Note Type	

Enter Data view

How to Enter Default Values

1. Open the appropriate form record in the Module Administration - Forms module.
 2. Select Enter Data from the Views list.
 3. Fill in the Default Values field next to a the associated fields.
- The Enter Data window opens.
4. Click Save.

Special Lists of Values

Construct custom lists of values queries in the Special Lists of Values view. When creating a special LOV you can only refine the existing LOV filter on the field, but you cannot change the basic structure such as adding or removing columns of information.

Special Lists of Values view

How to Create a Special List of Values

Create a custom list of values by identifying the field you want to modify then entering an overriding SQL statement.

1. Identify the LOV and GROUP names for the field that you want to modify.
- Open the module, click in the field, select Help > About Item and note the LOV Name and Record Group values.
- In this example, the Alerts Business Rule will be modified.
2. Open the Modules Administration - Forms module and search on the module where the field appears, and select Special LOVs from the Views list.

3. Click New.

If you want to change an existing special LOV, you must delete the existing and create a new one.

To view the existing Special LOV for this example, search on RULE in the Form Name field then find the WO FINISH WITH OPEN PO OR REQ rule key in the Alerts Business rule.

You can also access the database using a database development tool. For this example look at the WO FINISH WITH OPEN PO OR REQ rule key in the Alerts Business rule:

```
SELECT
  FORM_NAME, LOV_NAME,
  GROUP_NAME, RECORD_GROUP_NAME, RECORD_GROUP_QUERY,
  LOV_TITLE, LOV_DESC, SYSTEM_REQUIRED_IND
FROM SYNERGEN.SA_FORM_NAMES_LOVS Tbl
Where
  RECORD_GROUP_NAME = 'SPECIAL_LOVS_KEY_VALUE' AND GROUP_NAME = 'WO
  FINISH WITH OPEN PO OR REQ'
```

4. On the Special List of Values screen enter the list of values Name and Record Group values for your unique list of values in the LOV and Record Group fields (respectively).

5. Also enter a Title, Group Name and Description. The Title appears in the title bar of the list of values window. The Group value entered appears as the rule key.

6. Enter SQL as necessary to produce the desired results.

Remember, you can only refine the existing LOV filter on the field, but you cannot change the basic structure such as adding or removing columns of information.

For this example the existing SQL might be modified to exclude one of the options, or to modify the description of the option:

```
SELECT 'BUYER' code, 'Send the alert to the Buyer' code_desc FROM
dual UNION SELECT 'REQUESTOR' code, 'Send the alert to the
Requestor' code_desc FROM dual UNION SELECT 'BOTH' code, 'Send
the alert to both the Buyer and Requestor' code_desc FROM dual
```

7. Return to the module to see the results.

The system displays applicable errors if the SQL does not work properly.

Custom Menus

The Custom Menus view allows you 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 and underlines a letter of the Menu Title and each Submenu Title based on hot keys that you create. You control which letter is underlined by placing an ‘&’ sign in front of the letter you want to designate as the hot key.

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 review the User Guide entitled Responsibilities to find out how to add these modules to a user's profile.

Custom Menus view

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.

Please refer to the [Configuration Guide](#) for a full list of [SAPI Triggers](#) and more information on [Custom Menus](#).

Selection Order By

In the Search Options window of each module, there is an Order By field that contains options for ordering the data queried in your search. The Selection Order By view in the Module Administration - Forms module allows you to customize the ordering options appearing on the Search Options window in each module. As you add new ordering options, they appear on the drop-down list of the Search Options window in the sequence that you specify.

By creating Selection Order By Options, you save time for employees by offering search order options that are relevant to your organization's business operations. Creating Selection Order By Options is one way you can customize your system. Please refer to the Administration guide chapter on Code Tables and Codes to learn additional customization tools.

The Selection Order By view allows you to determine the default Order By options on the Search Options page in a given module. Open the appropriate form and select Selection Order By from the Views list. Since records are ordered by field names, you will need to know the correct form, block and field names that you want to use as the sort criteria. Lists of values are not available in the Selection Order By view window. Order By options that have a check in the Sys column are system required and should not be modified.

Seq	Label	Used	Used Block Name	Sys
2	Created Date (Descending)	CREATION_DATE DESC, PO_NO DESC	SELECTION	
5	PO No. Descending	PO_NO DESC, PO_REVISION_NO DESC	SELECTION	
7	Created Date (Ascending)	CREATION_DATE, PO_NO	SELECTION	
10	PO No.	PO_NO	SELECTION	
15	Dept, Requestor	requestor_department, requestor	SELECTION	
20	Vendor, PO No.	VENDOR_CODE, PO_NO	SELECTION	
25	Vendor Name, PO Number	VENDOR_NAME, PO_NO	SELECTION	

Selection Order By view

Form Name - Identifies the specific form where the Order By list will appear in the Search Options window.

Seq (sequence) - The items on the Order By list will be listed numerically according to this number.

Label - The text in this field represents 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 - Sort order is determined by the field where this box is checked.

Duplicate

A handy feature is the ability to duplicate an existing record. It allows you to use another record as a template. Then you only need to change a few fields in the newly created record before saving. For example, if you often generate purchase orders to the same vendor, it saves time to be able to copy an existing purchase order to that vendor rather than input all of the vendor information each time you have a new purchase order.

You can set up specific parameters for duplicating records in the Module Administration - Forms module for fields and blocks in a module. By setting parameters correctly you can prevent unnecessary or incorrect information from being copied when users duplicate records.

Copy Record functionality takes the concept of record duplication one step further by allowing you to copy the predefined set of fields and defaults from the module.

When you use the Duplicate Last Record Action in a module, the system only copies over header information.

Information from Views must be entered manually. Users can use the Copy Record action to duplicate the views as well.

Block Name	Field Name	Clear	Invalid	Check	Replace with Value
ITEM	FROM_WORK_ORDER_IND	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N
ITEM	MODIFIED_ITEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I
ITEM	PO_ITEM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ITEM	PO_ITEM_STATUS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CREATED

Duplicate view

You cannot put in default values for system required fields. They will copy the values over.

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.

Allow Duplicate

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.

Where in the Duplicate view you are setting what happens with fields WHEN they are duplicated, this view determines whether or not the fields or blocks can be duplicated at all.

Allow Duplicate view

Field Localization

The Field Localization view allows you to customize labels for the fields on a form.

'Field Localization view'

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.

Locale Fields in the Plant Module

Included in the Plant module are fields which allow you to determine your location and the phone format that should be used in that location. Localization settings can vary by Plant in one organization.

Plant module

Locale - The locale field allows you to set the plant location and local language used. These settings affect aspects of the system such as using postal codes rather than zip codes or whether the English or Metric system is used in measurements.

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.

Currency Codes

The [Currency Exchange Rates](#) module allows for the creation of multiple exchange rates per currency code. When the exchange rate is updated, the new effective date is stored and the previous rates and effective dates are kept as a log. This functionality provides an audit trail of prior exchange rates used for procurement.

Currency Codes module

Currency codes and exchange rates are entered on purchasing documents to calculate the appropriate procurement costs. To indicate which code should be defaulted on purchasing records, open the Plant module in the Enterprise subsystem and enter the default code in the Local Currency field. This code is displayed as the base currency in the upper right corner of the Currency module record.

Currency - Create unique currency codes as appropriate to your business needs.

Effective Date, Exchange Rate, and Comments - The table displays the rate from a foreign currency to your base currency and from your base currency to the foreign currency. Exchange Rates can be entered manually with comments as they change. When you enter one exchange rate, the system provides the other rate. The system also defaults the current date for the Effective Date, but this can be changed if necessary.

Copy Record

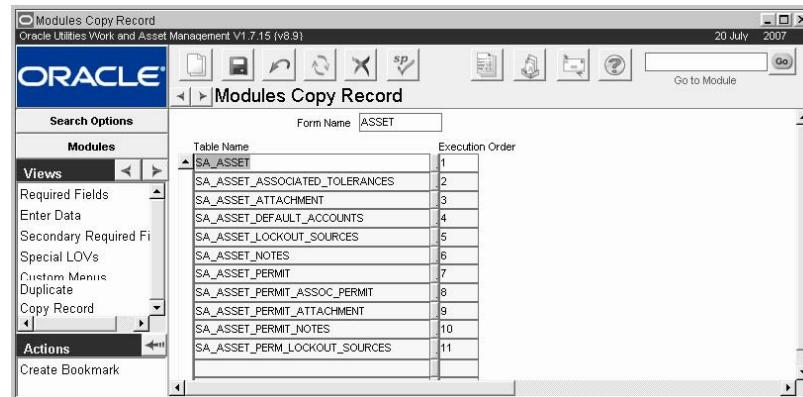
Users can select Copy Record from the Actions list in most modules to create an exact duplicate of a record. This functionality differs from duplicating the record in that it can copy all information from the original record, including line items, accounts, notes, attachments, and other details from the views.

Once you select the action from the list, the system opens a wizard that walks you through the process of creating the new record. If record numbers for the module are generated by the

system, this step is completed for you. Otherwise you will usually be prompted to enter the record number and any other required information.

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

In order for the Copy Record action to appear on the Actions list in any module users must have BOTH the Responsibility and at least one table added to the Copy Record view of the Module Administration - Forms module.



Copy Record view

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 errors or the creation of corrupt data.

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.

The following values can be entered to use [standard system defaults](#):

SYSDATE
USERNAME
DEFAULT_NAME
USER/DEFAULT_NAME

Table Name	Field Name	Default Value
SA_ASSET	ASSET_SEGMENTS1	
SA_ASSET	ASSET_SEGMENTS10	
SA_ASSET	ASSET_SEGMENTS2	
SA_ASSET	ASSET_SEGMENTS3	
SA_ASSET	ASSET_SEGMENTS4	
SA_ASSET	ASSET_SEGMENTS5	
SA_ASSET	ASSET_SEGMENTS6	
SA_ASSET	ASSET_SEGMENTS7	
SA_ASSET	ASSET_SEGMENTS8	

Field Defaults view

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 errors 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.

Status Required Fields

The Status Required Fields view allows you to designate fields as required based the current status of the record.

Block Name	Status	Field Name	Message Field Name

Status Required Fields view

Form Name - Identifies the specific form where the field is located.

Block Name - Identifies the specific block where the field is located.

Status - Designates the status that will require population of the field identified under Field Name.

Field Name - Identifies the name of the field on the form that will be required if the form is in the designated status.

Message Field Name - Message Field Name allows you to enter text that will be displayed in the alert box presented if a user does not enter a value into the field before saving.

Reqd - Check the Reqd (Required) box to make the field a required entry.

Sys - Check the Sys (System) box to indicate a field that should not be modified. A field with this box checked is no longer required at all.

Chapter 21

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.

Please note that to fill in any Default Value field, you can also use [standard system defaults](#).

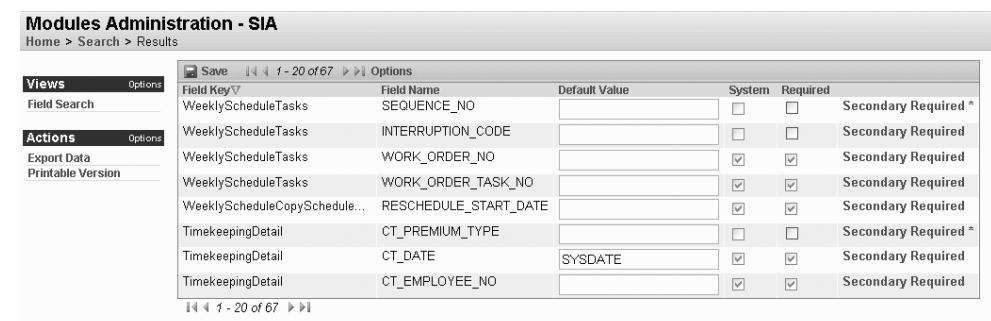
Related Topics

[Custom Menu Actions](#)
[Modules Administration - Forms](#)
[Special Lists of Values](#)

Modules Administration - SIA 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 on 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.



The screenshot shows the 'Modules Administration - SIA' interface with the 'Results' tab selected. The left sidebar has 'Views' and 'Actions' sections. The main area displays a table of fields with the following data:

Field Key	Field Name	Default Value	System	Required
WeeklyScheduleTasks	SEQUENCE_NO		<input type="checkbox"/>	<input type="checkbox"/>
WeeklyScheduleTasks	INTERRUPTION_CODE		<input type="checkbox"/>	<input type="checkbox"/>
WeeklyScheduleTasks	WORK_ORDER_NO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WeeklyScheduleTasks	WORK_ORDER_TASK_NO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WeeklyScheduleCopySchedule...	RESCHEDULE_START_DATE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TimekeepingDetail	CT_PREMIUM_TYPE		<input type="checkbox"/>	<input type="checkbox"/>
TimekeepingDetail	CT_DATE	SYSDATE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TimekeepingDetail	CT_EMPLOYEE_NO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SIA Modules Results window

The following fields are included:

Field Key - The field key represents the name of the component that groups related fields together on the screen. One field with the same name can take on different properties and property values (such as format mask or length) within different components. The purpose of a field key is to associate a field with the set of properties that are applicable to the field when it is included on a specific component.

Field Name - The field name identifies the name of the field on the form.

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.

Modules Administration SIA Views

The module includes the following view:

Secondary Fields

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.

Secondary Fields view

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 field is always required when the first field is populated with any value.

Chapter 22

Sequence Numbers

Throughout the system many numbers - such as ID Numbers - must be unique to identify the record that they are associated with. Often it is useful that these numbers be system generated to ensure that the numbers will be correct and in the right order. According to your business practices, you will want to decide which numbers are system generated and which can be entered manually.

When you adjust the settings in this module the changes apply only to the Plant to which you are currently logged on.

Sequence Number Records

Use the Sequence Numbers module to control the format of sequence numbers and determine whether or not the number is provided by the system.

Note: Most purchasing documents and some work order documents must have system-generated sequence numbers in order for the system to be able to process them correctly. You should consult with Oracle Utilities Work and Asset Management if you plan to turn this function OFF for any of these modules.

Table Name	Sequence No	Prefix	Length	System
ASSET	3		10	<input type="checkbox"/>
BENCHMARK	453		6	<input checked="" type="checkbox"/>
FLEET	1		15	<input type="checkbox"/>
SA_ACCOUNT_DISTRIBUTION	33ACC		10	<input checked="" type="checkbox"/>
SA_CATALOG	854007		9	<input type="checkbox"/>
SA_CHANGE_REQUEST	700056YY		7	<input checked="" type="checkbox"/>
SA_COMPATIBLE_STRUCTURE	6CS		15	<input type="checkbox"/>
SA_COMPATIBLE_UNIT	24CU		15	<input type="checkbox"/>
SA_CUSTOMER	59		10	<input checked="" type="checkbox"/>
SA_DELIVERY	600034YY		7	<input checked="" type="checkbox"/>
SA_DIRECT_CHARGES	700000015YY		10	<input checked="" type="checkbox"/>
SA_DOCUMENT	600000101YY		10	<input type="checkbox"/>
SA_INVOICE_BATCH	7		10	<input checked="" type="checkbox"/>
SA_JOB_HAZARD	3		15	<input type="checkbox"/>

Sequence Numbers record

The following fields are included:

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 what prefix 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".

Avoid the use of the special characters ',', '&', or '%' in prefixes as these characters are not allowed in prime keys. As most record ID numbers constitute at least a portion of the prime keys for their associated records, using these special characters in prefixes may result in processing errors.

Note: 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 system provides users with a sequence number.

Chapter 23

Accounting Periods

You can define accounting periods in the Accounting Periods module to match the accounting periods used by your general Ledger application. An Account Period is the time period during which costs accumulate. Costs accumulate until the system sets the Period to Closed status. Accounting periods also affect calculations for Period to Date summaries for Accounts, Projects, etc. The End of Period Processing Business Rule determines how the system will handle closeout processes for these periods.

The list is ordered by year and cannot be resorted.

Year	Period Start Date	End Date	Status	Updated	Updated By
2006	02	01 FEB 2006	28 FEB 2006	Closed	07 DEC 2006 16:35:10 RAY
2006	03	01 MAR 2006	31 MAR 2006	Closed	07 DEC 2006 16:35:12 RAY
2006	04	01 APR 2006	30 APR 2006	Closed	07 DEC 2006 16:35:14 RAY
2006	05	01 MAY 2006	31 MAY 2006	Open	15 DEC 2006 19:30:36 RVEKSLER
2007	08	01 AUG 2007	31 AUG 2007	Open	14 DEC 2006 11:42:22 RAY
2007	09	01 SEP 2007	30 SEP 2007	Open	14 DEC 2006 11:42:29 RAY
2007	10	01 OCT 2007	31 OCT 2007	Open	14 DEC 2006 11:42:42 RAY
2007	11	01 NOV 2007	30 NOV 2007	Open	14 DEC 2006 11:42:49 RAY
2007	12	01 DEC 2007	31 DEC 2007	Open	14 DEC 2006 11:42:53 RAY

Accounting Periods record

Year and Period - The Year and Period number uniquely identify each Period.

Start Date and End Date - The Start Date and End Date defined the period.

The system is flexible enough to reflect any accounting period scheme that you use for your General Ledger. Years do not have to begin on January first and they do not have to be 365 days long. Periods do not have to be months, nor does one period have to be as long as another.

The system does not allow you to enter overlapping periods. However, you can enter periods with gaps between them. For example, you might forget to include February 29th for leap years. The system does not identify this error until the batch processing attempts to pass the transaction record to the General Ledger interface. If this occurs the batch process will result in an error message and you will have to modify the appropriate account period and re-run the batch process.

Status - There are two possible statuses:

Open - Adjustments and postings can be made to open periods. Typically only the current period should be open, because a status of Closed indicates the all charges and credits have been posted and resolved.

Closed - Adjustments and postings cannot be made to closed periods. Typically all periods but the current one should be closed.

Updated and Updated By - These fields contain information about the last user to make changes to the period, and the date that the changes were made.

Chapter 24

Job Manager

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. In many cases, once a record is processed it will be set to a status such as Posted or Finished to indicate that the record is closed and will not undergo any further processing in the system.

Batch processing uses computer resources efficiently and facilitates off-hour completion of time consuming tasks that can slow down the system. Your System Administrator sets the periodic date and time that database procedures and packages run through the Job Manager module.

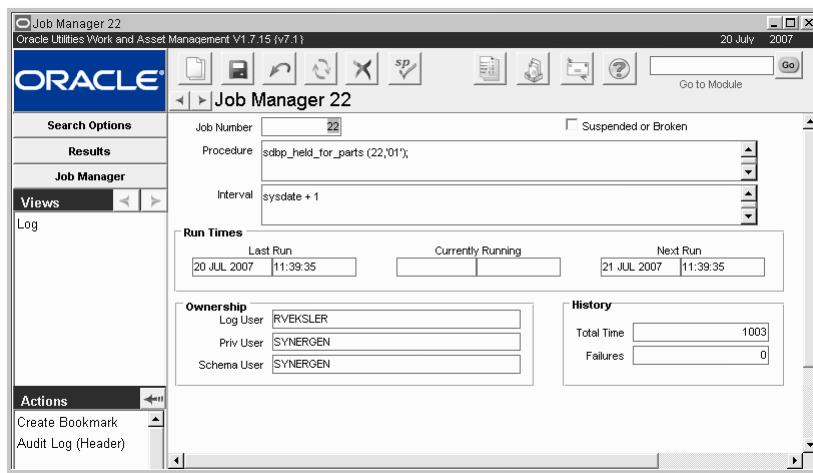
Please refer to your configuration guide for descriptions of each specific batch process.

Job Manager Records

Batch processes are stored as database packages and database procedures, and are managed in 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 can print a report of the Job Manager Log using the Job Manager Log Report in the Report Administration module.

The order in which batch procedures are run makes a difference since batch procedures may be dependent upon the data processed in other batch procedures. 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.



Job Manager record

The procedure 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.

The following fields are included:

Job Number - System-generated number which uniquely identifies the job (scheduled database procedure). It must be included as a parameter of the Job Description of a batch procedure for the job to run properly.

Job Desc - Use this field to enter the database package or procedure name (as stored in the database), followed by the Job Number (NN) and the Plant Code ('PC') that you want this job to process, followed by a semicolon. [Examples](#).

Suspended or Broken - The Suspended or Broken check box is checked by the system when the Job failed to complete. You can also use it to prevent the Job from submitting. When checked, the Suspend button is replaced by the Release button. Press Release to uncheck the check box, releasing the Job to be resubmitted.

Procedure - The procedure field stores the name of the database package or any SQL file, followed by Job Number and Plant Code for which the Job will run. If you want the same routine to run for another Plant Code, you must create another Job Manager record. Descriptions should be entered using the following formats.

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

procedures: PROCEDURE_NAME (NN, 'PC') ;

NN is Job Number, 'PC' is Plant Code. Do not forget the semi-colon at the end.

Interval - Interval determines how often the routine will be automatically run by the system. [Click here](#) for examples.

Run Times - Last Run, Currently Running, Next Run - Last, Current, and Next Run are maintained by the system, indicating the completion date and time of the last run, the start date and time if the job is currently running, and the date and time it will run again. (Next Run is initially entered by you during insert and may be updated if desired.)

Log, Priv (privileges), and Schema User - Log User is the username of the user who first submitted the Job. Priv User is the username of the user whose privileges the job will inherit when run. Schema User is the Job's schema username when run. Database procedures which submit or modify Jobs default Priv and Schema Users to the database owner name.

History - The history section gives numerical information about running the job. TOTAL TIME is the cumulative execution time (in seconds), and FAILURES is the number of times the job failed to complete.

Creating Batch Jobs

Select Create Job from the Actions list in the Job Manager module to set basic information about the job, such as a job description, and the start time and interval that the job will run.

How to Create a Batch Job

1. Open the Job manager in the Administration subsystem.
2. Select Create Job from the Actions list on the Search Options screen.
An Update Job window opens.
3. Update the fields according to the [field descriptions](#).
4. Click the Save button.

The system opens the Job record for the updated job so that you can modify it where necessary.

Modifying Batch Jobs

How to Modify a Batch Job

1. Open the appropriate Job Manager record.
2. Revise the fields as appropriate according to the field descriptions below.

Job Number - The Job Number is system generated and cannot be modified.

Suspended or Broken - The Suspended or Broken check box is checked by the system when the Job failed to complete. You can also use it to prevent the Job from submitting. When checked, the Suspend action is replaced by the Release action. You can then select Release from the Actions list to uncheck the check box, releasing the Job to be resubmitted.

Procedure - The procedure field contains the same information that you entered in the description field in the Update Job window.

Run Times - Last, Current, and Next Run are maintained by the system, indicating the completion date and time of the last run, the start date and time if the job is currently running, and the date and time it will run again.

Log, Priv, and Schema User - Log User is the username of the person who initially submitted the Job. Priv User is the username of the person whose privileges the job will inherit when run. Schema User is the job's schema username when run. Database procedures which submit or modify jobs, default Priv and Schema Users to the database owner name.

History - The history section gives numerical information about running the job. TOTAL TIME is the cumulative execution time (in seconds), and FAILURES is the number of times the job failed to complete.

3. Click Save.

Running Batch Jobs

The system regularly reviews submitted jobs, executing a job when it comes due. You can also choose to run the job manually by selecting Run Now from the Actions list. Once completed, the system submits the job to run again based on the entered Interval information.

Log

The Job Manager Log view is essentially a jump to the information available in the Job Manager Log module. Both the view and the module are select only. Information cannot be inserted, updated, or deleted. For more detailed information on the Job manager Log see the section entitled Job Manager Log module.

Please refer to your Configuration Guide or online Help for more information on specific batch processes.

How to Submit a New 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.

How to Run a Job

The system regularly reviews submitted jobs, executing a job when it comes due. You can also choose to run the job online by selecting Run Now from the Actions list. Once completed, the system submits the job to run again based on the entered Interval information.

How to Delete a Job Manager Record

1. Open the Job Manager Module Window.
2. Perform a search to find the record that you want to delete.
3. Select the record that you want to delete from the Results of Search List.
4. Click the Delete icon.

Deleting a record from the Job Manager module has no impact on the stored database procedure.

Code Examples for Intervals

Examples of code that you can use to determine Intervals include but are not limited to:

SYSDATE + 1 - cycles 24 hours after run completion
 SYSDATE + 1/24 - cycles 1 hour after run completion
 TRUNC(SYSDATE) + 1 + 20/24 - cycles each day at 8:00pm
 ADD_MONTHS(SYSDATE, 1) - cycles one month after run completion

To have jobs run on weekdays only, you can use one of the following examples or create interval definitions as you require.

Monday through Friday:

```
TRUNC(NEXT_DAY(SYSDATE,DECODE(RTRIM(TO_CHAR(SYSDATE,'DAY')),  

'MONDAY','TUESDAY',  

'TUESDAY','WEDNESDAY',  

'WEDNESDAY','THURSDAY',  

'THURSDAY','FRIDAY',  

'MONDAY')))+22/24
```

Monday, Wednesday, Friday:

```
TRUNC(NEXT_DAY(SYSDATE,DECODE(RTRIM(TO_CHAR(SYSDATE,'DAY')),
```

```
'MONDAY','WEDNESDAY',
'TUESDAY','WEDNESDAY',
WEDNESDAY','FRIDAY'
'THURSDAY','FRIDAY',
'MONDAY'))+22/24
```

Monday through Thursday:

```
TRUNC(NEXT_DAY(SYSDATE,DECODE(RTRIM(TO_CHAR(SYSDATE,'DAY')),
'MONDAY','TUESDAY',
'TUESDAY','WEDNESDAY',
'WEDNESDAY','THURSDAY',
'MONDAY'))+22/24
```

Chapter 25

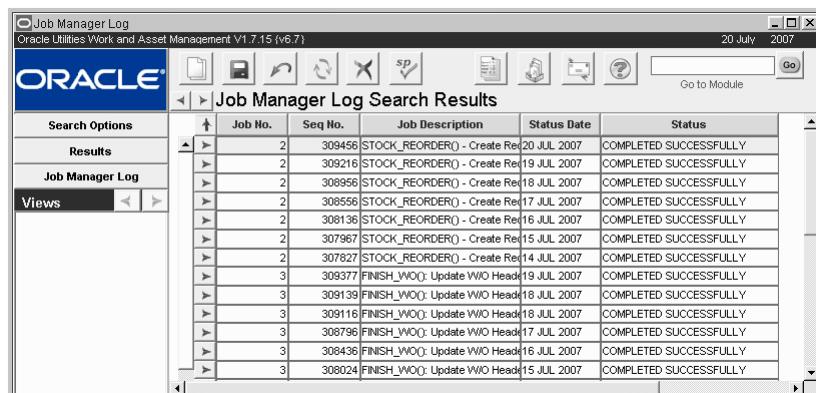
Job Manager Log

You can quickly access Job Manager historical information in the Job Manager Log module. This module 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.

This module is display only. Information cannot be inserted, updated, or deleted. This information can also be accessed from the Views list in the Job Manager module.

Job Number uniquely identifies the Job (scheduled database procedure). The Sequence Number is generated by the system to uniquely identify any given run (of a procedure). Also displayed is the date and time the run completed or terminated, the status of the run (such as Completed Successfully), and the Job description.

The Job Manager can print a report of the Job Manager Log using the Job Manager Log Report in the Reports module of the Administration subsystem.



Search Options	Job No.	Seq No.	Job Description	Status Date	Status
Results	2	309456	STOCK_REORDER() - Create Re	20 JUL 2007	COMPLETED SUCCESSFULLY
Job Manager Log	2	309216	STOCK_REORDER() - Create Re	19 JUL 2007	COMPLETED SUCCESSFULLY
Views	2	308956	STOCK_REORDER() - Create Re	18 JUL 2007	COMPLETED SUCCESSFULLY
	2	308556	STOCK_REORDER() - Create Re	17 JUL 2007	COMPLETED SUCCESSFULLY
	2	308136	STOCK_REORDER() - Create Re	16 JUL 2007	COMPLETED SUCCESSFULLY
	2	307967	STOCK_REORDER() - Create Re	15 JUL 2007	COMPLETED SUCCESSFULLY
	2	307827	STOCK_REORDER() - Create Re	14 JUL 2007	COMPLETED SUCCESSFULLY
	3	309377	FINISH_WO() Update WO Head	19 JUL 2007	COMPLETED SUCCESSFULLY
	3	309139	FINISH_WO() Update WO Head	18 JUL 2007	COMPLETED SUCCESSFULLY
	3	309116	FINISH_WO() Update WO Head	18 JUL 2007	COMPLETED SUCCESSFULLY
	3	308796	FINISH_WO() Update WO Head	17 JUL 2007	COMPLETED SUCCESSFULLY
	3	308436	FINISH_WO() Update WO Head	16 JUL 2007	COMPLETED SUCCESSFULLY
	3	308024	FINISH_WO() Update WO Head	15 JUL 2007	COMPLETED SUCCESSFULLY

Job Manager Log record

The system creates the Messages record using information submitted by the Job while it is running, keeping a complete log of transactions, errors, and other messages that are encountered during the run. Each Message is also time stamped. Messages cannot be modified.

Chapter 26

Server Report Queue

Through the Server Report Queue module, you can monitor Report jobs which have been complete, are currently running, or are held in your system server report queue. You can also resubmit jobs.

Only Run Date and Destination information can be modified. Remaining information is select only. You can change the Run Date and Time information, and/or Destination information (for printing), then resubmit the job by pressing the button. The job is then resubmitted to your system server report queue to run at the designated time.

Select Resubmit the Report from the Actions list to run the report from the form window. The system will ask you if you are sure that you want to run the report again. Select Yes or No accordingly.

Server Report Queue 21
Oracle Utilities Work and Asset Management V1.7.15 (v6.6)
20 July 2007

Search Options

Results

Server Report Queue

Views

Actions

Batch No: 21 Report ID: S_RPT028

Status: QUEUED

Submitted By: SYNERGEN 28-JUL-00

Run Date: 28 JUL 2000

Destination Type: File

Destination Name: e:\oracle\report60\server\cache\syn6i.synergen.com21.pdf

Destination Format: PDF

Where Clause: WHERE 1=1 and STOCK_TYPE like 'INVENTORY%' and PLANT = '01'

Order By: ORDER BY STOCK_CODE

Server Report Queue record

Chapter 27

Oracle Data Dictionary

One of the most important parts of an Oracle database is its data dictionary; a read-only set of tables that provides information about the database behind Oracle Utilities Work and Asset Management. The data dictionary contains:

1. Definitions of all schema objects in the database (including tables, views, indexes, clusters, synonyms, sequences, procedures, functions, packages, and triggers).
2. How much space has been allocated for, and is currently used by, the schema objects.
3. Public Synonyms for Data Dictionary Views.
4. Integrity constraint information.
5. The names of Oracle users.
6. Privileges and roles each user has been granted.
7. Auditing information, such as who has accessed or updated various schema objects.
8. Other general database information.

A schema is a collection of logical data storage structures (schema objects).

The data dictionary is structured in tables and views, just like other database data. All the data dictionary tables and views for a given database are stored in that database's SYSTEM tablespace.

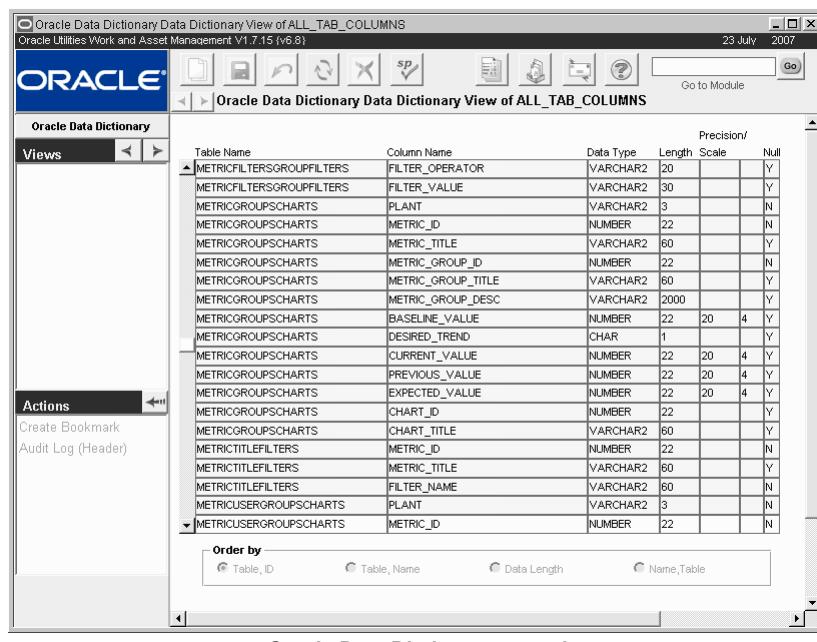
Not only is the data dictionary central to every Oracle database, it is an important tool for all users, from end users to application designers and database administrators. To access the data dictionary, you use SQL statements. Because the data dictionary is read-only, you can issue only queries (SELECT statements) against the tables and views of the data dictionary.

Oracle Data Dictionary Records

The Oracle Data Dictionary module provides you on-line access to the Oracle table ALL_TAB_COLUMNS.

When you open the module, the Data Dictionary View of ALL_TAB_COLUMNS window is presented without any information.

The information in this module is display only and cannot be modified.



How to Search the Data Dictionary

- 1. Enter into any of the columns information by which to search.**
Be sure to explicitly use “%” for wildcard searching. Radio buttons located at the bottom are used to order selected data.
 - 2. Press F8 to query the database.**
Order By options are available across the bottom of the window.

The Structure of the Data Dictionary

A database's data dictionary consists of:

Base Tables - The underlying tables that store information about the associated database. Only Oracle should write to and read these tables. Users rarely access them directly because they are normalized, and most of the data is stored in a cryptic format.

User-Accessible Views - The views that summarize and display the information stored in the base tables of the data dictionary. These views decode the base table data into useful information, such as user or table names, using joins and WHERE clauses to simplify the information. Most users are given access to the views rather than the base tables.

SYS - Owner of the Data Dictionary

Warning: Altering or manipulating the data in underlaying data dictionary tables can permanently and detrimentally affect the operation of a database.

The Oracle user SYS owns all base tables and user-accessible views of the data dictionary. Therefore, no Oracle user should ever alter (update, delete, or insert) any rows or schema objects contained in the SYS schema, because such activity can compromise data integrity. The security administrator should keep strict control of this central account.

How the Data Dictionary Is Used

The data dictionary has three primary uses:

- Oracle accesses the data dictionary to find information about users, schema objects, and storage structures.
- Oracle modifies the data dictionary every time that a data definition language (DDL) statement is issued.
- Any Oracle user can use the data dictionary as a read-only reference for information about the database.

How Oracle Uses the Data Dictionary

Data in the base tables of the data dictionary is necessary for Oracle to function. Therefore, only Oracle should write or change data dictionary information.

During database operation, Oracle reads the data dictionary to ascertain that schema objects exist and that users have proper access to them. Oracle also updates the data dictionary continuously to reflect changes in database structures, auditing, grants, and data.

For example, if user KATHY creates a table named PARTS, new rows are added to the data dictionary that reflect the new table, columns, segment, extents, and the privileges that KATHY has on the table. This new information is then visible the next time the dictionary views are queried.

How Users and DBAs Can Use the Data Dictionary

The views of the data dictionary serve as a reference for all database users. You access the data dictionary views via the SQL language. Some views are accessible to all Oracle users; others are intended for database administrators only.

The data dictionary is always available when the database is open. It resides in the SYSTEM tablespace, which is always online.

The data dictionary consists of sets of views. In many cases, a set consists of three views containing similar information and distinguished from each other by their prefixes:

The set of columns is identical across views with these exceptions:

- Views with the prefix USER usually exclude the column OWNER. This column is implied in the USER views to be the user issuing the query.
- Some DBA views have additional columns containing information useful to the administrator.

Prefix	Scope
USER	User's view (what is in the user's schema)
ALL	Expanded user's view (what the user can access)
DBA	Database administrator's view (what is in all users' schemes)

Views with the Prefix USER

The views most likely to be of interest to typical database users are those with the prefix USER. These views

- refer to the user's own private environment in the database, including information about schema objects created by the user, grants made by the user, and so on
- display only rows pertinent to the user
- have columns identical to the other views, except that the column OWNER is implied (the current user)
- return a subset of the information in the ALL_ views
- can have abbreviated PUBLIC synonyms for convenience

For example, the following query returns all the objects contained in your schema:

```
SELECT object_name, object_type FROM user_objects;
```

Views with the Prefix ALL

Views with the prefix ALL refer to the user's overall perspective of the database. These views return information about schema objects to which the user has access via public or explicit grants of privileges and roles, in addition to schema objects that the user owns. For example, the following query returns information about all the objects to which you have access:

```
SELECT owner, object_name, object_type FROM all_objects
```

Views with the Prefix DBA

Synonyms are not created for these views, because the DBA views should be queried only by administrators

Views with the prefix DBA show a global view of the entire database. Therefore, they are meant to be queried only by database administrators. Any user granted the system privilege SELECT ANY TABLE can query the DBA-prefixed views of the data dictionary.

Synonyms are not created for these views, because the DBA views should be queried only by administrators. Therefore, to query the DBA views, administrators must prefix the view name with its owner, SYS, as in

```
SELECT owner, object_name, object_type FROM sys.dba_objects;
```

Administrators can run the script file DBA_SYNONYMS.SQL to create private synonyms for the DBA views in their accounts if they have the SELECT ANY TABLE system privilege. Executing this script creates synonyms for the current user only.

Oracle creates public synonyms on many data dictionary views so that users can access them conveniently. (The security administrator can also create additional public synonyms for schema objects that are used system wide.) Users should avoid naming their own schema objects with the same names as those used for public synonyms.

Adding New Data Dictionary Items

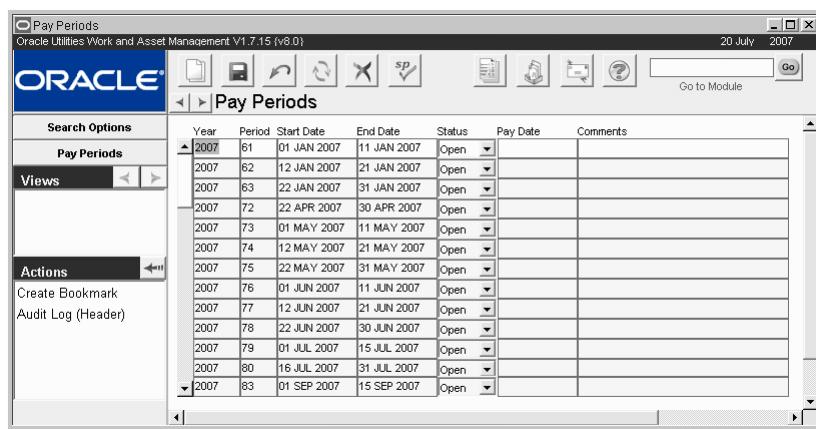
You can add new tables or views to the data dictionary. If you add new data dictionary objects, the owner of the new objects should be the user SYSTEM or a third Oracle user.

Caution - Never create new objects belonging to user SYS except by running the script provided by Oracle Utilities Work and Asset Management for creating data dictionary objects.

Chapter 28

Pay Periods

Pay Periods are defined and maintained in the Pay Periods module. Each Period is identified by the Year and Period number.



Year	Period	Start Date	End Date	Status	Pay Date	Comments
2007	61	01 JAN 2007	11 JAN 2007	Open		
2007	62	12 JAN 2007	21 JAN 2007	Open		
2007	63	22 JAN 2007	31 JAN 2007	Open		
2007	72	22 APR 2007	30 APR 2007	Open		
2007	73	01 MAY 2007	11 MAY 2007	Open		
2007	74	12 MAY 2007	21 MAY 2007	Open		
2007	75	22 MAY 2007	31 MAY 2007	Open		
2007	76	01 JUN 2007	11 JUN 2007	Open		
2007	77	12 JUN 2007	21 JUN 2007	Open		
2007	78	22 JUN 2007	30 JUN 2007	Open		
2007	79	01 JUL 2007	15 JUL 2007	Open		
2007	80	16 JUL 2007	31 JUL 2007	Open		
2007	83	01 SEP 2007	15 SEP 2007	Open		

Pay Periods record

A Pay Period delineates a time period (which cannot overlap another Period) to which Timesheet costs roll up until the Period is set to “Closed” status.

If you are adding new Pay Period records, the Year and Period number combination must be unique and the Start and End Dates cannot overlap existing Pay Period dates.

The status is set to “Open” and remains so until you set it to “Closed”. Once the Period is closed, no charges can be applied to it.

Pay Date is the date for the Period that employees are to be paid.

You can use the **Comments** field to attach a brief note to each period.

The End of Period Processing Business Rule determines how the system will handle closeout processes for these periods.

Chapter 29

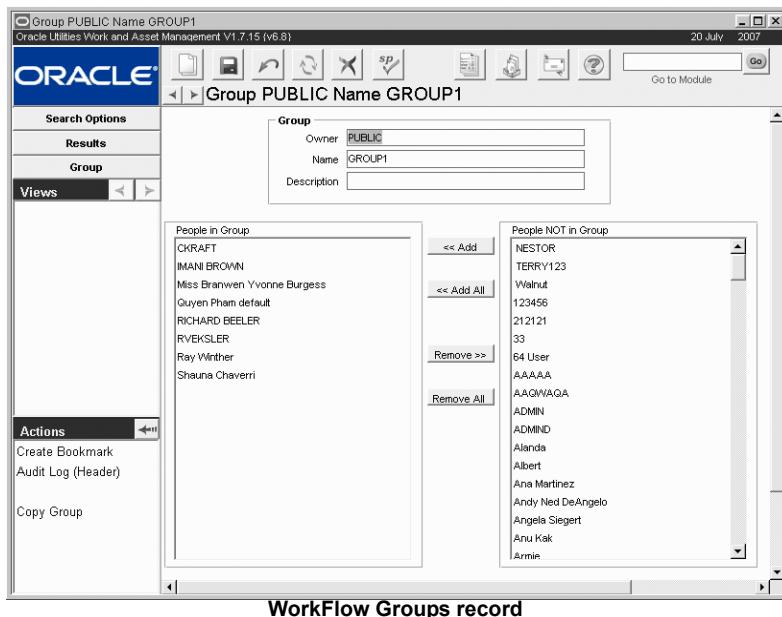
WorkFlow Groups

Using the WorkFlow Groups module you can build and maintain lists of users to facilitate easier distribution of messages and information to specific groups of people. Once a group is established users can use it in a manner very similar to Distribution Lists in e-mail programs.

Group names appear in the Address Message window where you select them for addressing messages.

WorkFlow Group Records

Open the WorkFlow Group module to begin creating distribution lists for your application messaging. The top section of the record allows you to define the group name, the owner, and enter a description. Select users to appear in the group in the lower section of the screen.



The following fields are included:

Group Owner - Designated the Group Owner to determine who has access to the group. Only the user identified in the Group Owner field can use a given workflow group, however, this can be set to public so that anyone can use the list.

User Name - The system automatically enters your Username as the Group Owner. If you select this option, you will be the only person who is 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.

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 select this button, the system moves the name to the People in Group column.

The Add All Button - If you select 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.

The Remove Button - If you highlight a name in the People in Group column, and select this button the system moves the name to the People Not in Group column.

The Remove All Button - If you select 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.

When you use the “Add All” or “Remove All” buttons the system automatically saves the changes for you and the Cancel button cannot be used to undo the change.

Once you click an Add or Remove button, the system performs the action and saves the record. You do not have to Click Save.

How to Create a Workflow Group

1. Open the Workflow Groups module.
2. Click New.
3. Fill in the fields according to how you want to set up the group.
4. Click Save.
5. Add members to the group.

Once a workflow group is created, you can add names to and remove names from the workflow group using the Add or Remove buttons.

Workflow Group Actions

In addition to standard actions, the following can be completed from within the module.

Copy Group

You can duplicate a group by selecting copy Group from the Actions list. This is useful if you want to create a new group that has similar members to an existing group.

Revising Workflow Groups

Once a workflow group is created, you can add and remove names from the workflow group.

How to Add Members to a WorkFlow Group

1. Select WorkFlow Groups from the Administration subsystem.
2. Locate the group that you want to add a member to.
3. Select a name from the People NOT in Group list.
4. Click the Add or the Add All button.
5. Click Save.

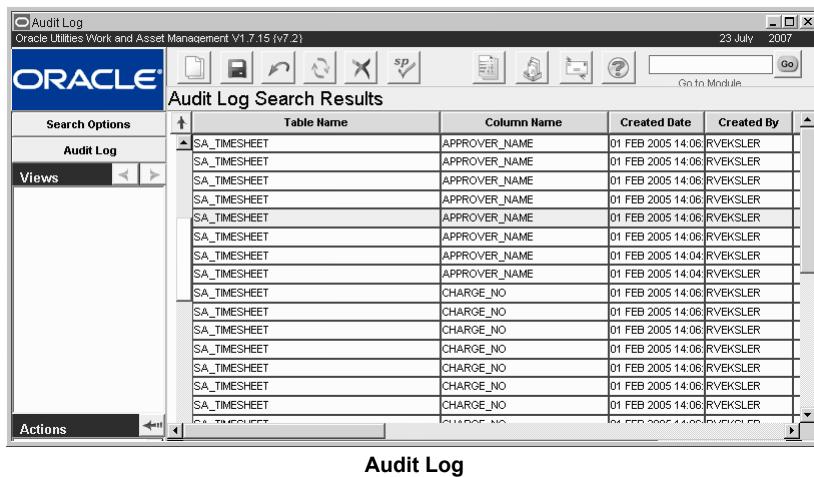
How to Remove Members from a WorkFlow Group

1. Select WorkFlow Groups from the Administration subsystem.
2. Locate the Group that you want to remove a member from.
3. Select a name from the People in Group list.
4. Click the Remove or the Remove All button.
5. Click Save.

Chapter 30

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. This log functions in the same way as other system transaction logs in that you can sort and rearrange the columns if necessary. This log also displays the change, the date of the change, the actual change made, and the old value if applicable.



The screenshot shows a window titled 'Audit Log' with the sub-header 'Audit Log Search Results'. The window is part of the 'Oracle Utilities Work and Asset Management V1.7.15 (v7.2)' application. The title bar also shows the date '23 July 2007'. The window contains a table with the following columns: 'Table Name', 'Column Name', 'Created Date', and 'Created By'. The data in the table is as follows:

Table Name	Column Name	Created Date	Created By
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:04	RVEKSLER
SA_TIMESHEET	APPROVER_NAME	01 FEB 2005 14:04	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER
SA_TIMESHEET	CHARGE_NO	01 FEB 2005 14:06	RVEKSLER

You can control which modules are audited by setting the Key Value to ON or OFF on Key Names starting with SAUT_ in the Installation Parameters module.

This module uses standard functionality used in all Transaction Logs to rearrange columns, save the layout, and sort data. Please refer to the System Basics guide chapter on Transaction logs for more information.

Chapter 31

Event Queue

The system manages a queue of requests, such as emails or charts, which need to be processed in the Event Queue module. E-mail requests can be for approval requests or other alerts generated by the system. Chart requests regenerate the chart thumbnails displayed in the Charts module or on the Home page. All requests are processed in the order that they are received.

Use the event queue to verify whether a specific event was completed successfully or if it failed. The listing of events can be sorted and searched by a variety of criteria. Use the search options to filter or sort the list as needed.

Administrators can click the highlighted Event number to open a window that displays additional information about the event, including technical details. This information can be used to troubleshoot and to report problems.

Please refer to the [Event Queue](#) topic in the Configuration Guide for more information on managing the Event Queue.

Event Statuses

These event statuses are as follow:

Pending - The requested event has been added to the queue and is waiting to be processed.

Processing - The requested event is currently being processed by the system.

Retry - The system attempted to process the requested event, but an error occurred. The system will attempt to process the event again at a later time (configurable - see note below).

Completed - The requested event was processed successfully.

Failed - The system attempted to process the requested event, but an error occurred. The system attempted to retry the request, but those retries also failed. Further processing will not be attempted.

Chapter 32

Graphs Administration

While the Oracle Utilities Work and Asset Management charts functionality requires Microsoft Excel, graphs allow you to represent information visually without relying on the Excel product.

Use the Graphs Administration module to create or modify graphical representations of data within the system. The Graphs Administration page consists of 3 sections: Graph Definition, Graph Display, and Graph Filters. To create a new graph enter definition values and SQL in the appropriate fields.

The graphs functionality differs from charts in that graphs allow users to represent information without relying on Microsoft Excel. Where charts are executed from Oracle Utilities Work and Asset Management must be presented in Microsoft Excel pivot tables with MS web components, all of the graphing functionality is handled within the Oracle Utilities Work and Asset Management application. Additionally, users can dynamically filter the data that is graphed and they can easily alter the appearance of the graphs by changing characteristics such as labeling, dimensions, color and special effects.

Graph Viewer

The Graph Viewer allows users to display pre-configured graphs or standard graphs delivered with the product. Users can modify graphs displayed in the Graph Viewer, but the changes cannot be saved. Within the graph viewer users will see Site Graph and System Graph on the Views list. These options allow users to select between the graphs that were developed on-site, or those that were delivered with the application. The two graph types are stored in separate database tables; XT_GRAPH_ONSITE and XT_GRAPH. It is safe to modify or Site Graphs in addition to creating new ones.

Note: For more information please refer to the user documentation for the Graph Viewer located in the System Basics Guide.

Site Graph - Site Graphs are the graphs that were created on-site by someone within your organization. These graphs are likely to be tailored to your organization and the type of information that you typically use on a regular basis. Both lists may contain the same graphs because the application is installed with system graphs copied as site graphs so that they can be used as a starting point.

System Graphs - System Graphs are the graphs that were delivered in the application and cannot be modified by anyone within your organization. These can be useful for reviewing sample graphs or to determine the types of filters you can apply to your own graphs.

Graph Definition

Use this section to define the SQL Query to derive the graph, labels, colors, widths, and other graph definition settings.

Defining the Graph

Graph Name and Description - Enter the name and description for the graph in these fields. The system displays the name in the Graph Viewer and includes it as a drop-down option when selecting a graph to view. The description does not appear on the graph.

Data Source and Type - The data source field holds the query that returns the data for the graph, default category labels and default legend labels (if defined).

At this time SQL is the only Data Source Type recognized by the graph interface.

The first column in the select portion of an sql data source query holds the category labels, each row holding one label in the order that they will appear in the graph. All other columns are considered to contain graphable data and must contain numeric information. When there is only one column in the select portion of the query and the column data is numeric, it will be considered a data column and will be graphed instead of being used for category labels. You can also assign category labels in the [Category Labels](#) field described below.

The field names for each column used as graph data are used as the legend labels, displayed in the order in which they appear in the select statement. You can also assign legend labels in the [Legend Labels](#) field described below.

Insert question marks in place of 'where clause' values to indicate where a filter will be used instead of an explicit value. Variables can also be used in other parts of the SQL where a filter would be useful. You can use up to six of these variables which you then define in the Graph Filters section. You can also choose not to use any filters in your graph.

As an advanced method you can also use a variable for the operator in the where clause.

You must have one filter defined for each variable that is used in the sql data source. This is explained in more detail in the Graph Filters section as well as being illustrated in the sql examples.

Please refer to the section titled [SQL Guidelines for sample SQL and graphs](#).

Autofilter Plant - Place a check in the Autofilter Plant box to prompt the system to automatically filter for the plant that the user is logged in to when accessing the graph.

Graph Definition Information

Graph

Graph Name: VEHICLE COST YRLY

Graph Desc: Yearly vehicle costs broken down by category. Filterable by ASSET and YEAR.

Data Source Type: SQL

Data Source: `SELECT period_year, SUM(NVL(labor_amount,0)) "Labor Amount", SUM(NVL(parts_amount,0)) "Parts Amount", SUM(NVL(total_cost_per_mile,0)) "Total per Mile" FROM`

Autofilter Plant:

Titles and Labels

Graph Title: Yearly Vehicle Cost

Left Title: \$

Bottom Title:

Category Labels: (default)
(comma delimited)

Value Label: Axis Only

Legend Labels: (default)
(comma delimited)

Appearance and Dimensions

Bar Colors: green, blue, purple
(comma delimited)

Background Color: Gainsboro

Foreground Color: Whitesmoke

Border Type: 3D

Effect Option: Bar Gradients

Graph Width: 300 pixels

Graph Height: 400 pixels

Bar Thickness: 16 pixels

(Note: Bar Thickness is ignored if a Graph Width is indicated.)

Graph Definition

Titles and Labels

Graph Title, Left Title and Bottom Title - The Graph Title serves as the main title of the graph and is displayed at the top. The Left Title and Bottom Title are displayed at the left and bottom respectively. These are the sub titles used to describe the entire contents of the vertical axis and horizontal axis.

Category Labels - Category labels identify each data point that is graphed along the horizontal (X) axis. These can be defined in the source SQL by entering labels as the first column.

If you choose to enter labels here, it is important to verify that they represent each data field in the query meaningfully. The order in which they are given must match up with the data as it is ordered in the records returned by the query. Therefore, providing Category Labels is only

practical when the actual number of records returned by the query is a known and fixed number. If Category Labels are provided but the number of records is greater than the number of provided labels, then no Category Labels will show for the remaining data points from record numbers greater than the number of given Category Labels. Category Labels must be separated by a comma when entered.

Value Label - This refers to display options for “numeric labeling” of the data being shown in the graph. This includes whether or not a Y axis “tick” scale is displayed and also whether or not the number value being represented by each bar is written into the top of the bar itself.

If the bar widths are narrower than the number that would be displayed, the number will be clipped and misrepresented. Note that the numeric value of each bar can always be displayed when you hover over the bar with the mouse pointer. The values for each bar can also be seen in the Graph Data section.

Legend Labels - Legend labels appear in the legend that is generated at the right side of the graph whenever there is more than one data field in the select portion of the data source query. Providing legend labels will override the labels that would be taken from the select column names that represent graph data. When defining these labels, it is important to ensure that they meaningfully represent each data field in the query. The order in which they are given must match up with the order and number of the fields in the select portion of the data source query. Legend Labels must be separated by a comma when entered.

Appearance and Dimensions

Colors: Bar, Background, Foreground - If no values are provided for the foreground, background, or the bars the system will use default colors for the display. Colors can be represented by any valid HTML color. For example, both the words “red” and “green” are valid entries, as are their hexed counterparts, “FF0000” and “00FF00” (the quotes should not be entered).

If Bar Colors are provided, then they will be used in the order in which they are given, for each data series in the order in which it is displayed (as determined by the data source query). If an insufficient number of colors are provided, then the default internal color of a data series will be used.

Note: By default Internet Explorer does not print the background colors and images from pages. This means if you try to print a graph the bar colors and background colors will not be printed. To fix this, select Tools > Internet Options > Advanced Tab > Printing > and check the Print background colors and Images option.

Border Type - There are various choices of border types that can be selected here (none, single, 3D). Whatever choice is made, it is applied to two border geometries in the graph - the outer edge of the graph itself and the outer edge of each bar.

Effect Option - You can choose to have no fill in the graph bars, to have a full fill of color, or to show a static gradient of gray color blended into the original bar color. These effects are purely cosmetic and have no other meaning.

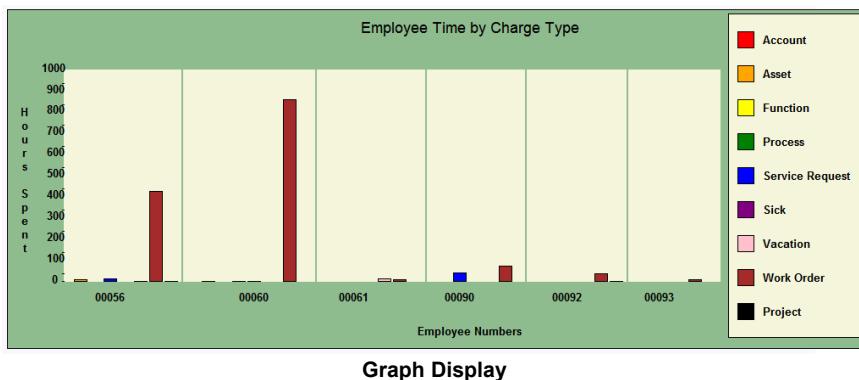
Graph Width - If this value is provided, it constrains the width of the graph to this value (in pixels), regardless of how little or how much data is displayed in the graph. It is not recommended that you set this value unless the exact graph width is important and the number of records to be returned is a known and fixed value. If Graph Width is set, then the Bar Thickness setting is ignored.

Bar Thickness - The Bar Thickness value determines the width (in pixels) of the bars that are displayed. Assuming Graph Width is not set then the Bar Thickness, in conjunction with the number of records returned from the data source query determines the width of the graph.

Graph Display

A sample of the graph is displayed below the Graph Definition once the graph has been created. Use this to preview the graph and to make sure that it displays as intended.

The settings in the screen shot above render this graph



Graph Display

Graph Filters

Enter up to six Graph Filters that end users can apply to the graph when viewing it in the Graph Viewer. Each filter must be represented in the data source query by an embedded question mark. You can also choose not to use any filters in your graph.

Graph Viewer Query Filters (maximum of six)					
<input type="checkbox"/> Order	<input type="checkbox"/> Filter Label	Default Value	List Query	Cache Max Hrs	Add
<input type="checkbox"/>	1 Crew =	BYB	SELECT crew, crew_desc Description FROM sa_crew WHERE	24	N/A
<input type="checkbox"/>	2 Craft LIKE		SELECT key_name Craft, key_desc Description FROM sa_rule_k	24	N/A
<input type="checkbox"/>	3 Year operator	IN	SELECT 'e' AS Operator FROM dual UNION SELECT '>' AS Oper	24	N/A
<input type="checkbox"/>	4 Year	('2005', '2006', '2007')	SELECT DISTINCT period_year Year FROM sv_graph_employee	24	N/A
<input type="checkbox"/>	5 Period =		SELECT DISTINCT v.period_no, t.start_date, t.end_date FROM sv	24	N/A
<input type="checkbox"/>	6 Employee No. LIKE		SELECT employee_no, SUBSTR(name_last '.' name_first, 1, 30)	24	N/A
1 2 3 4 5 6 of 6 7 8					

Graph Filters

The Graph Filters section allows you to enter up to six filters that end users can apply to the graph when viewing it in the Graph Viewer. Each filter must be represented in the data source query by an embedded question mark. The embedded question marks in the SQL are replaced in the order defined by the filter order by any non-empty value chosen by the user (or defaulted) before the query is executed.

If no value is provided for a filter when the user draws a graph in the Graph Viewer, then that portion of the data source query (typically a portion of the where clause) will be temporarily removed from the data source query prior to execution.

Order - Enter a sequence number to indicate the order in which the filter should be applied to the query. To change the order, make sure that you update all of the numbers then save after they are all changed. The system will allow gaps in numbers, but will not allow the same number to apply to more than one filter. Once you have arranged the filters in the desired order, you must make sure that the filters are numbered in sequential order 1-6 with no gaps.

Label - The label entered will appear in the list of values presented to the user in the Graph Viewer.

Default Value - The value entered here will be defaulted into the filter field on the Graph Viewer. Depending upon where you place embedded question marks, a default value may be required in order to display the graph.

Filter Query - Enter a basic SQL select statement to define the filter. Using joins and other complex SQL statements is also not supported. It is recommended that you create a view to encapsulate any complex sql and then reference the view in the data source.

Cache Max Hours - The Cache Max Hours value is used to set a time frame which the query is stored to file (the html file representing the list of values) after it is executed for the first time. Until the max cache hours are reached, all subsequent requests from any user for this filter list will be serviced by this saved file, instead of a query being made to the database. This can speed up the performance considerably.

Valid values for Cache Max Hours range from 0 (no caching at all) to 99 hours, although you can modify the backing table, XT_GRAPH_ONSITE_FILTER, to set a higher number of hours. Try not to set too long of a cache period for fields with data that changes on a regular basis.

SQL Guidelines

Several pre-configured graphs are delivered with the Oracle Utilities Work and Asset Management product. You can refer to these samples to use as a guideline when configuring your own graphs.

If your graph uses filters or you check the Autofilter Plant check box, you cannot include a join in your SQL statement.

Complex SQL statements may not be supported. It is recommended that you create a view to encapsulate any complex sql and then reference the view in the data source.

Sample SQL - Vehicle Cost by Year

The following SQL statement defines category labels then queries the database for vehicle labor costs by year with question marks substituting for where clauses which are later defined in the Graph Filters section:

```
SELECT period_year, SUM(NVL(labor_amount,0)) "Labor Amount", SUM(NVL(parts_amount,0)) "Parts Amount", SUM(NVL(total_cost_per_mile,0)) "Total per Mile" FROM sv_vehicle_yearly_cost WHERE asset_id like '?%' AND period_year BETWEEN to_number('?) and to_number(to_char(sysdate,'YYYY')) GROUP BY period_year ORDER BY period_year
```

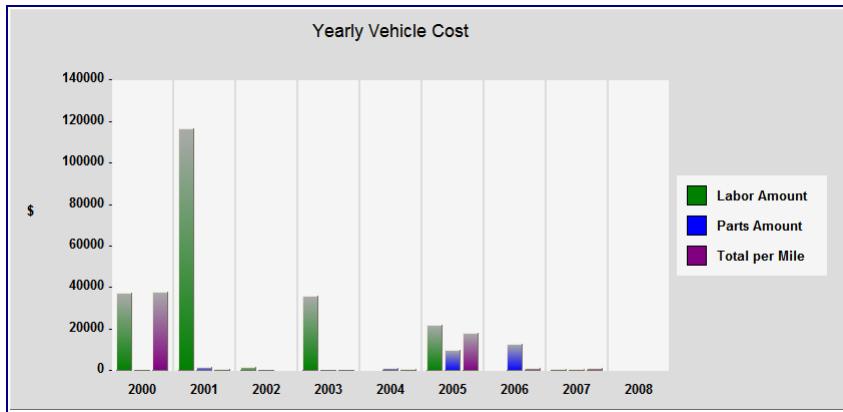
Filters

Filter Label	List Query
Asset LIKE	SELECT DISTINCT asset_id Asset FROM sv_vehicle_yearly_cost ORDER BY 1 ASC
Period Year BETWEEN	SELECT DISTINCT period_year Year FROM sv_vehicle_yearly_cost ORDER BY 1 ASC

The resulting graph data and graph are shown below:

Graph Data			
PERIOD_YEAR	Labor Amount	Parts Amount	Total per Mile
2000	37800.27	550.50	38350.77
2001	115953.29	2032.60	1169.90
2002	2162.70	274.40	24.10
2003	36009.02	409.33	307.08
2004	0.00	1556.38	877.54
2005	22187.83	9924.05	18500.46
2006	26.00	12859.70	1525.61
2007	936.00	724.55	1660.55
2008	0.00	-895.14	-895.14

Graph Data Rendered from Settings



Graph Rendered from settings

Additional Sample Graphs

For your convenience, the following sections show the SQL and filters used to derive some of the sample graphs delivered with the product.

Active Tasks by Crew

Total active tasks by crew filterable by total number per crew.

SQL - select decode(crew, null, '(no crew)', crew) crew, sum(no_tasks) Tasks from WOTSUMMARYSTATUS where task_status = 'ACTIVE' group by crew having sum(no_tasks) > ? order by 2 desc, 1 asc

Filters

Filter Label

Tasks > 10

List Query

select rownum Tasks from WOTSUMMARYSTATUS where task_status = 'ACTIVE' and rownum < 101 -- this just selects a list of numbers from 1 to 100

Active Tasks by Priority

Work order task counts grouped by priority ranges. Filterable by crew or backlog group.

SQL - select '90 to 99' P, Sum(Decode(sign(nvl(task_priority_total,0)-89),1,1,0)) WOs From sa_work_order_task Where task_status = 'ACTIVE' Union Select '80 to 89' P, Sum(Decode(sign(nvl(task_priority_total,0)-79),1,decode(sign(nvl(task_priority_total,0)-89),1,0,1),0)) WOs From sa_work_order_task Where task_status = 'ACTIVE' Union

```

Select '70 to 79' P, Sum(Decode(sign(nvl(task_priority_total,0)-69),1,decode(sign(nvl(task_
priority_total,0)-79),1,0,1),0)) WOs From sa_work_order_task Where task_status = 'ACTIVE'
Union Select '60 to 69' P, Sum(Decode(sign(nvl(task_priority_
total,0)-59),1,decode(sign(nvl(task_priority_total,0)-69),1,0,1),0)) WOs From sa_work_order_
task Where task_status = 'ACTIVE' Union Select '50 to 59' P, Sum(Decode(sign(nvl(task_
priority_total,0)-49),1,decode(sign(nvl(task_priority_total,0)-59),1,0,1),0) ) WOs From sa_work_
order_task Where task_status = 'ACTIVE' Union Select '40 to 49' P,
Sum(Decode(sign(nvl(task_priority_total,0)-39),1,decode(sign(nvl(task_priority_
total,0)-49),1,0,1),0) ) WOs From sa_work_order_task Where task_status = 'ACTIVE' Union
Select '30 to 39' P, Sum(Decode(sign(nvl(task_priority_total,0)-29),1,decode(sign(nvl(task_
priority_total,0)-39),1,0,1),0) ) WOs From sa_work_order_task Where task_status = 'ACTIVE'
Union Select '20 to 29' P, Sum(Decode(sign(nvl(task_priority_
total,0)-19),1,decode(sign(nvl(task_priority_total,0)-29),1,0,1),0) ) WOs From sa_work_order_
task Where task_status = 'ACTIVE' Union Select '10 to 19' P, Sum(Decode(sign(nvl(task_
priority_total,0)-9),1,decode(sign(nvl(task_priority_total,0)-19),1,0,1),0)) WOs From sa_work_
order_task Where task_status = 'ACTIVE' Union Select '1 to 9' P, Sum(Decode(sign(nvl(task_
priority_total,0)-9),-1,decode(nvl(task_priority_total,0),0,0,1),0,1,0)) WOs From sa_work_
order_task Where task_status = 'ACTIVE' Union Select '0' P, Sum(decode(nvl(task_priority_
total,0),0,1,0)) WOs From sa_work_order_task Where task_status = 'ACTIVE' order by 1 desc

```

Filters - None.

Employee Count

Count of employees per crew. Filterable.

SQL - select Crew, count(EMPLOYEE_NO) Count from SA_CREW_EMPLOYEE_ASSIGNMENT group by Crew having count(EMPLOYEE_NO) > ? order by ?

Filters

Filter Label	List Query
Count >	select rownum from SA_CREW_EMPLOYEE_ASSIGNMENT where task_status = 'ACTIVE' and rownum < 101 -- this just selects a list of numbers from 1 to 100
Order By	select 'Crew' Item from dual union select 'Count' Item from dual
Direction	select 'asc' sort from dual union select 'desc' sort from dual

Chapter 33

Charts Administration

Settings in the Charts and Metrics Settings business rule determine the default time frame shown in a chart.

Two kinds of charts are available: full-screen interactive charts and small thumbnail charts that can be added to the home page. The interactive charts show current data, while the smaller charts reflect information gathered by batch processing. Since they are controlled by batch processing, the smaller charts are not as up to date as the larger charts, however, double-click one of these small charts to open the larger, real-time version showing the most current information.

Charts Administration

Open the Charts Administration module to add, edit or delete charts. Each available chart is listed showing the Chart ID, the chart number, and a description.

Editing Charts

Click the chart ID to open a separate page where you can edit or delete the chart. You can update the chart title, the description, or indicate the location of a new chart to use. Please contact Oracle Utilities Work and Asset Management for information on editing existing chart content or adding additional charts.

Regenerating Images

Click the Regenerate Image button for a chart if you want to run the batch process and update the chart on the spot. The thumbnail image of each chart is a *.jpg, so when this button is selected the system pulls the current data recreates the image based on that data. This functionality performs the same task as if you were to open the Job Manager log, select sdbp_generate_chart_image, and select Run Now from the Actions list.

Chart Responsibilities

As an alternative to adding responsibilities for the chart in the Responsibility module, System Administrators can select the Chart ID and then navigate to the lower section of the screen to manage Responsibilities for individual charts. To add a responsibility, simply click Add Responsibility then select the Responsibility ID from the list of values. Users with that responsibility will then have access to the chart.

Home Page Charts

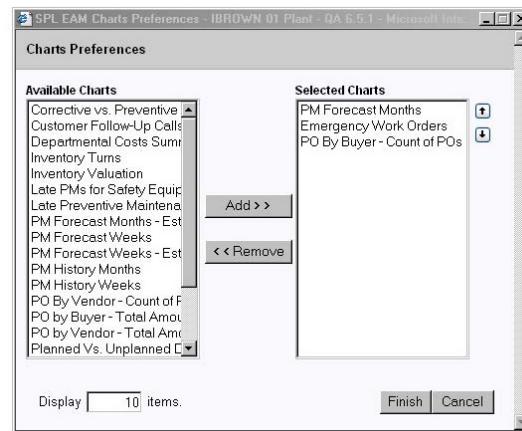
Users can access a list of charts by clicking the Charts icon in the home page toolbar. Here, users can review a listing of all the charts that are available to them, as well as open charts to view the full-scale interactive charts.

Charts can be added to the home page as a component in the same way that other home page components are added. First, select a position for the chart component, then select the charts to display.

How to Add Charts to the Home Page

1. Open the home page.
 2. Select Page from the Personalize list and click the Go button.
 3. Click the Add button in the column where you want to add charts.
The Add Content window opens.
 4. Click Charts.
- The Charts Preferences window opens.

Add and remove charts by highlighting the item clicking the Add or Remove button.



The list can be edited later by clicking the Options link next to Charts on the home page to reopen the Chart Preferences windows.

5. Select the charts to add to the home page.
If necessary, use the Up and Down arrows to arrange the order in which the selected charts appear.
6. Enter the number of charts to display.
7. Click the Finish button to save changes and return to the home page.

Adding Charts

This section discusses adding charts that retrieve information from the Oracle database. See the following sections for information on adding static charts and spreadsheets that do not query the Oracle database.

Creating a new chart and providing access to it from within the application is a four step process. First you must set up your data and the pivot table in excel. Next, create the chart. Once the chart is created, you need to publish it to an HTML page so that it can be accessible from within the system. The last step is to upload the chart and set the needed responsibilities.

How to Set Up Chart Data in a Pivot Table

These instructions apply to earlier versions of Microsoft Excel (2000 - 2003). Please refer to the Appendix for instructions on creating charts in Microsoft Excel 2007.

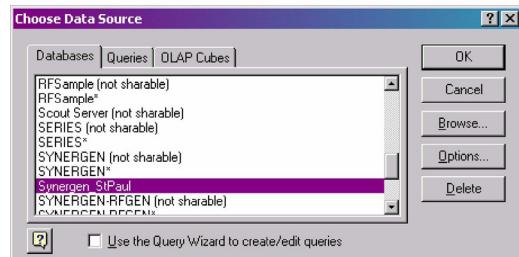
1. Create a View in the Oracle Utilities Work and Asset Management database (Note: for the view to work it will need a synonym and grant).
2. Create an ODBC link to your database using “Microsoft ODBC for Oracle” (use the version that starts with 2.573...)
3. Open Excel.
4. Select Data > Pivot Table > Pivot Chart Report from the menu.
5. Choose the External Data Source, and the PivotTable (NOT PivotChart report) radio buttons



6. Click the Next button.
7. Click the Get Data button.

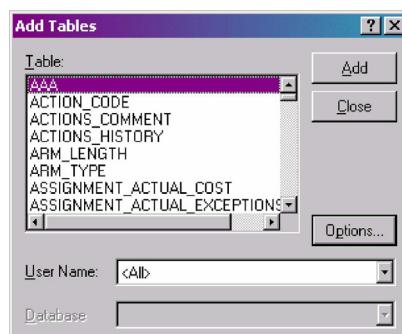


8. Choose your ODBC connection and click the OK button.

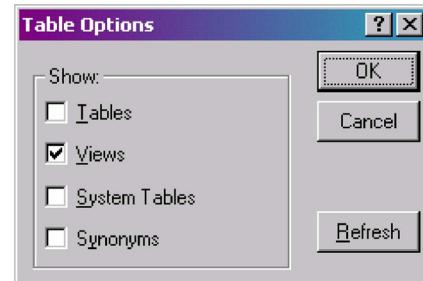


The system logs you on the ODBC session.

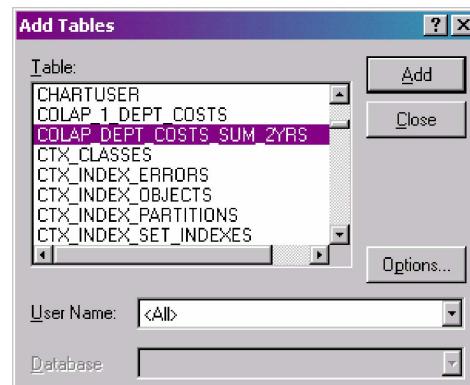
9. Click the Options button.



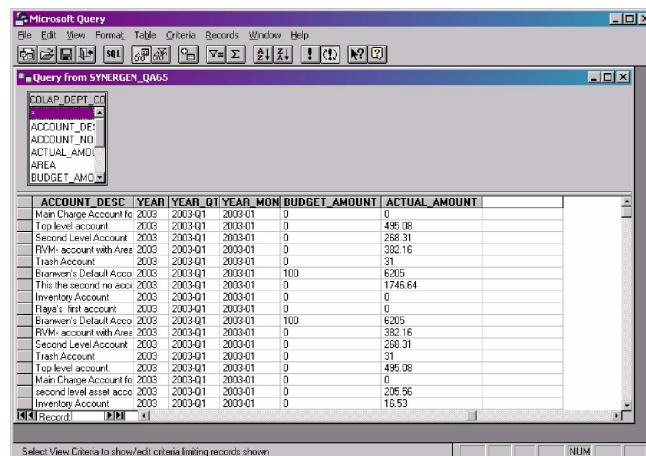
10. Select Views then click the OK button.



11. Select the desired View and click the Add button.



12. Click the * in the data box to look at the data from the view.



13. Select File > Return data to Microsoft Excel from the menu.

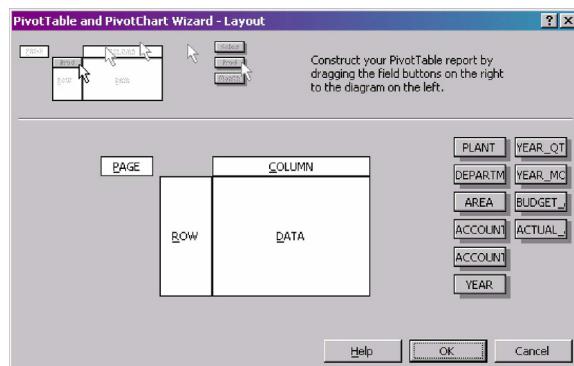
14. Click the Next button.



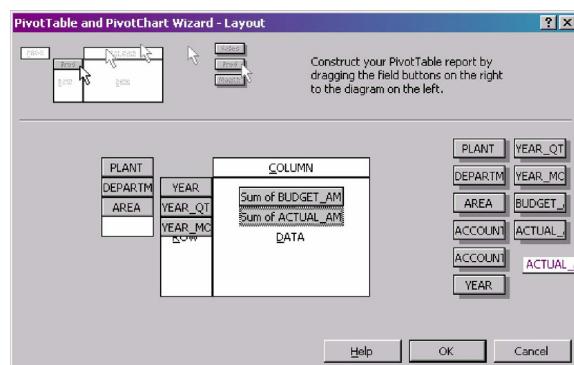
15. Click the Layout button to place your columns on the chart.



The following screen opens after you click the Layout button:



16. Place column blocks as shown below then click the OK button.



17. Select "Existing worksheet" then click the Finish button.



18. Click anywhere in the table of data and click the Format Report button on the Pivot Table toolbar (see the toolbar in screen below- the button that has a lightning bolt on it).

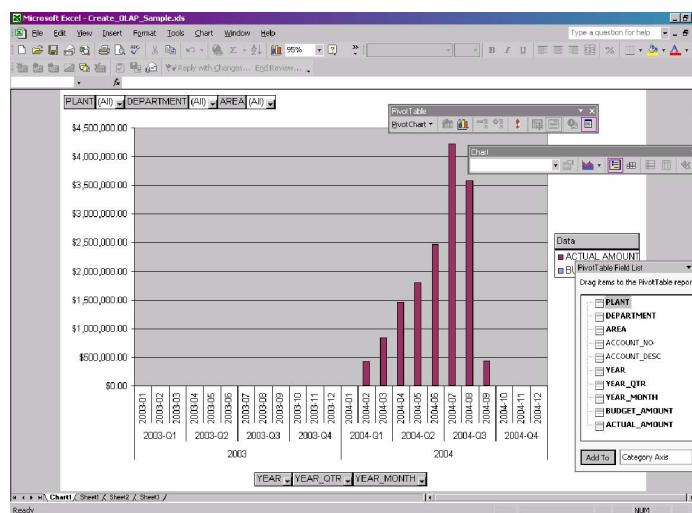
If you don't see this toolbar, select View, > Toolbars > PivotTable from the menu.

19. Select Table 4 and click the OK button.

The reformatted chart opens. You may still need to edit this screen. In this case, the Year column will have to be moved over in front of the Year_Qtr area.

How to Create the Chart in Excel

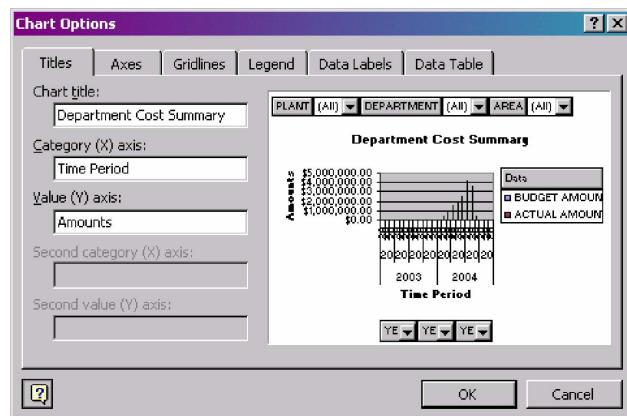
1. Click anywhere in your data table. On the PivotTable toolbar click the icon that looks like a graph (the Chart Wizard).



A new tab will be created called “Chart1” as shown above. The chart was created as a stacked-column bar chart; normally clustered-column charts are used.

To change chart type, select the chart then right click and select Chart Type.

2. Select the first bar chart on the list.
3. Right-click the mouse and select Chart Options.
4. Change the titles as appropriate.

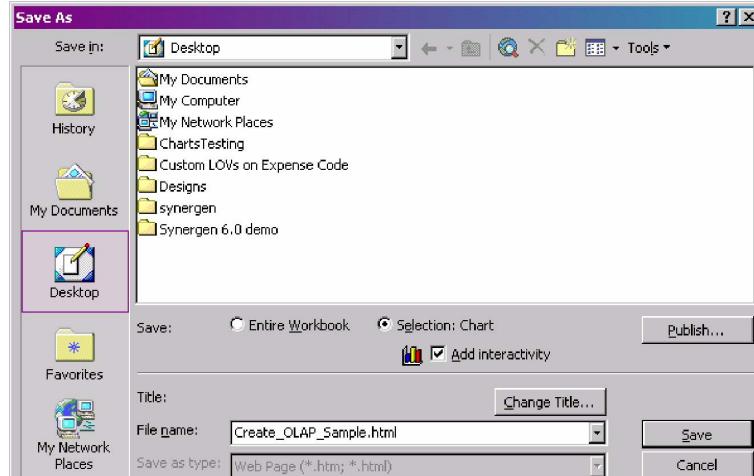


How to Publish the HTML page for the Chart

Now you are ready to publish your Html page. This will later be uploaded into the system. To start, make sure you are on the tab in Excel which contains your Chart.

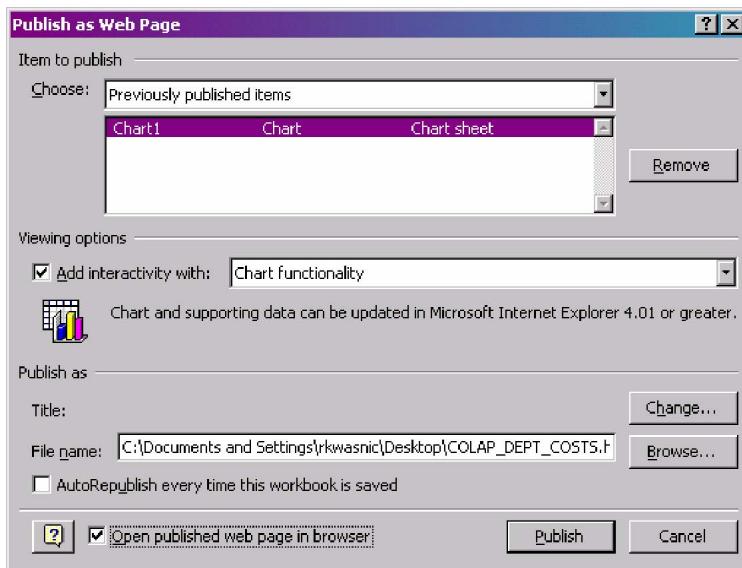
1. Select File > Save as Web Page from the Excel menu bar.
2. Change the settings as shown below making sure that “Selection: Chart” and “Add interactivity” are selected.

Use your own File name, and make sure that the file extension is .html.



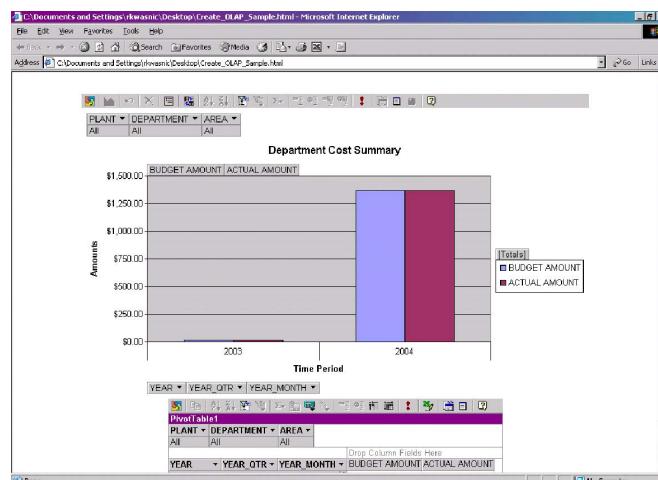
3. Click the Publish button.
4. Make changes as shown below.

Choose your Chart 1, “Add interactivity with: Chart functionality”, and making sure that “Open published web page in browser” is selected. Enter your own file name.



5. Click the Publish button to produce the page.

After the page is published, you can click the “Open published web page in browser” link. This is not necessary; it will just allow you to see the chart before you actually upload it to Oracle Utilities Work and Asset Management.



How to Upload the Chart

1. Open the Charts Administration module.

ID	Chart Title	Chart Desc	
S_CHART147	Preventive Work Orders	The number of Preventive Work ...	Regenerate Image
S_CHART148	Planned Vs. Unplanned Downtime	A comparison of Planned Downti...	Regenerate Image
S_CHART149	Project Analysis	The Budget Amount, Original Es...	Regenerate Image
S_CHART151	Work Order Aging	The number of days Active Work...	Regenerate Image
S_CHART164	PM Forecast Months - Estimate...	The duration of Preventive Maint...	Regenerate Image
S_CHART165	PM Forecast Weeks - Estimate...	The duration of Preventive Maint...	Regenerate Image

2. Click New.

A screen opens where you can enter information about the new chart.

Charts Administration
Home > Results > Chart

Title:

Description:

Chart File:

Chart Data XML File:

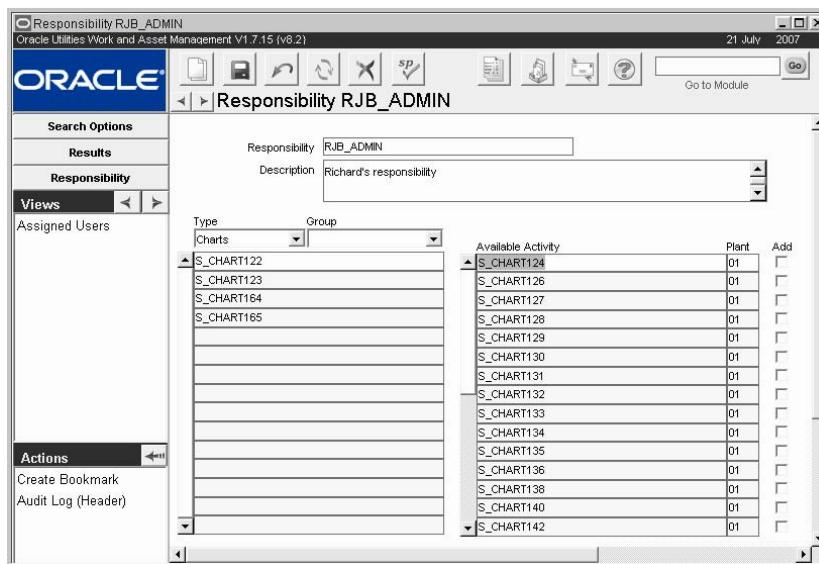
3. Enter the title, the description and browse to the chart file that you created.
You do not need to specify a Chart Data XML file.

4. Click Save.

5. Find your new chart in the updated charts list and click the Regenerate Image button.

ID	Chart Title	Chart Desc	
S_CHART147	Preventive Work Orders	The number of Preventive Work ...	Regenerate Image
S_CHART148	Planned Vs. Unplanned Downtime	A comparison of Planned Downti...	Regenerate Image
S_CHART149	Project Analysis	The Budget Amount, Original Es...	Regenerate Image
S_CHART151	Work Order Aging	The number of days Active Work...	Regenerate Image
S_CHART164	PM Forecast Months - Estimate...	The duration of Preventive Maint...	Regenerate Image
S_CHART165	PM Forecast Weeks - Estimate...	The duration of Preventive Maint...	Regenerate Image

6. Open the Responsibility module and add the chart to profiles of users who have access to the chart.



Users can add the chart to their home page by selecting options in the Charts Portal.

How to Publish the HTML page for the Chart

To start, make sure you are on the tab in Excel which contains your Chart.

1. Select File > Save as Web Page from the Excel menu bar.
2. Change the settings as appropriate making sure that “Selection: Chart” and “Add interactivity” are selected.
Use your own File name, and make sure that the file extension is .html.
3. Click the Publish button.
Make changes as appropriate choosing your Chart 1, “Add interactivity with: Chart functionality”, and making sure that “Open published web page in browser” is selected.
Enter your own File name.
4. Click the Publish button to produce the page.
After the page is published, you can click the “Open published web page in browser” link.
This is not necessary; it will just allow you to view the chart that you created.

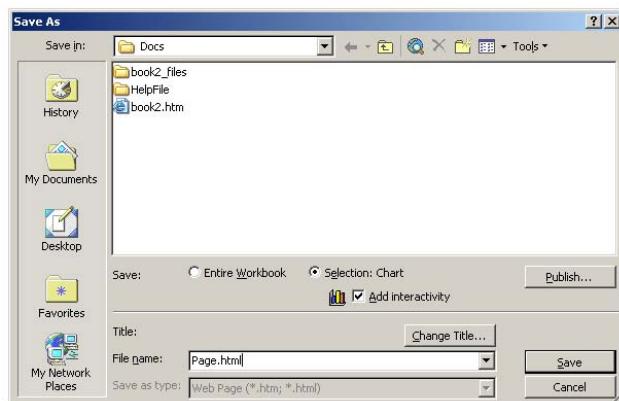
Next you need to upload the chart.

Adding Static Charts

Static charts do not query the Oracle database and do not require an ODBC connection. While they do not reflect real-time data, static charts are interactive and you can display different scenarios by modifying the chart's pivot table.

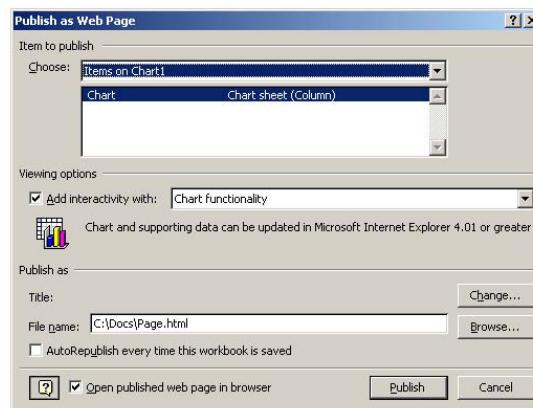
How to Add Static Charts

1. Open Excel workbook containing chart you want to add.
The Excel file should contain a pivot table and have a path and filename that do not contain spaces.
2. Click the Chart and select Save as Web Page from the Excel menu.
The Save As window opens.



3. Change file extension to .html, check the Add Interactivity box, and verify that the Selection: Chart radio button is selected.
4. Click the Publish button.

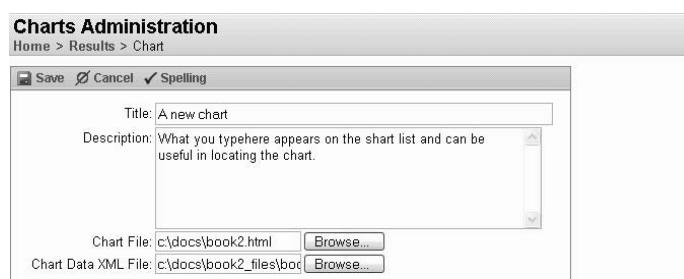
The Publish as Web Page dialog box opens.



5. Select to Add interactivity with Chart functionality and verify that the file name and path to the .html file are correct.
You may also want to check to open the published web page in your web browser to be sure the published chart appears as expected.
6. Click the Publish button.
7. Open the Charts Administration module and Click New.

A screen opens where you can enter information about the new chart.

8. Enter the required information.



Enter a title and description for the chart and browse to enter the .html file that you created. Also browse to enter the Chart Data XML file, which should be located in a directory one level below the .html file with '_files' appended to the directory name.

9. Click Save.

10. Open the Responsibility module and add the chart to profiles of users who have access to the chart.

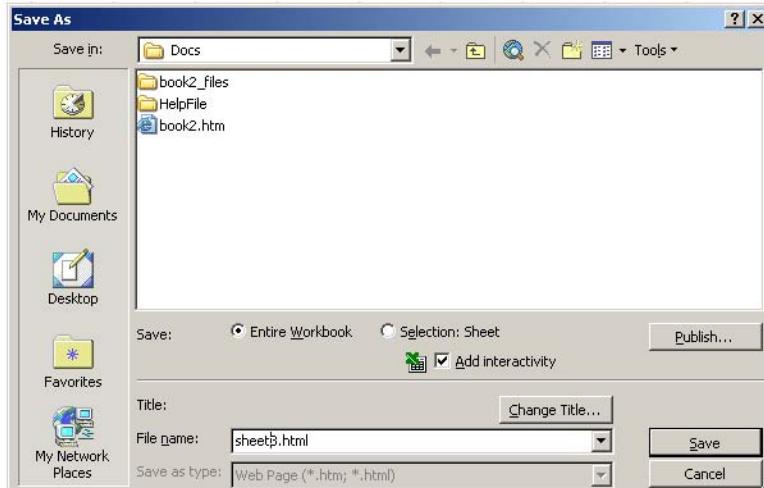
Users can add the chart to their home page by selecting it from Options in the Charts Portal.

Adding Excel Files without Charts

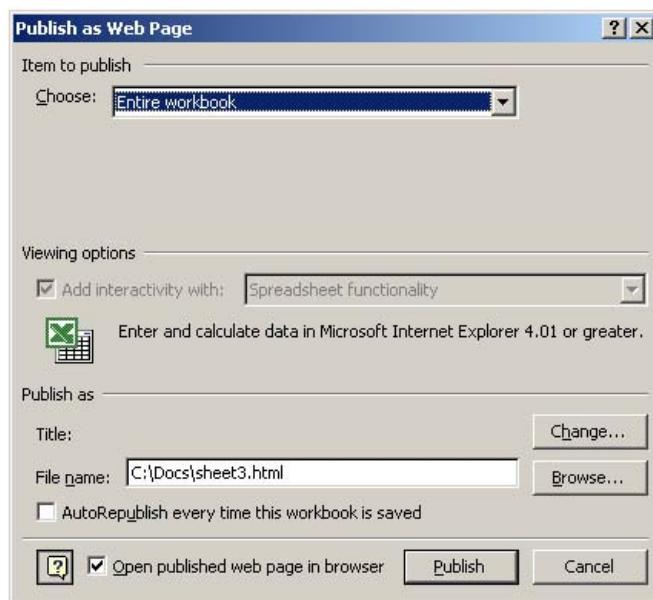
You can also add an Excel workbook that does not contain a chart. In this case, when the workbook is selected from the charts list in the Oracle Utilities Work and Asset Management application, the data displays in row/column format. Excel workbooks can be displayed with or without pivot table interactivity. The steps for adding Excel files are similar to those described for adding static charts.

How to Add Excel Files Without Charts

1. Open Excel workbook you want to add.
The path and filename that do not contain spaces.
2. Select Save as Web Page from the Excel menu.
The Save As window opens.



3. Change file extension to .html.
You can also check the Add Interactivity box if you want users to be able to sort, filter, and perform other basic analysis of the data in the workbook.
4. Click the Publish button.
The Publish as Web Page dialog box opens.



5. Verify that the file name and path to the .html file are correct.

You may also want to check to open the published web page in your web browser to be sure the published worksheet appears as expected.

6. Click the Publish button.

7. Open the Charts Administration module and Click New.

A screen opens where you can enter information about the new chart.

8. Enter the required information.



Enter a title and description for the chart and browse to enter the .html file that you created. You do not need to enter a Chart Data XML file.

9. Click Save.

10. Open the Responsibility module and add the chart to profiles of users who have access to the chart.

Users can add the chart to their home page by selecting options in the charts Portal.

Adding the Chart Server as a Trusted Site

The DISPLAY TRUSTED SITES LINK function in the user's responsibilities must be set in order for them to see the link.

Removing the server from the Trusted Sites list would be done in Internet Explorer's options under Security.

When users open a chart from their home page or the Chart List, they may receive a series of warning messages about accessing data on another domain. These messages are part of Internet Explorer's standard security against accessing data on unknown sites. Users can simply click Yes to continue, or they can avoid these messages in the future by clicking the "Add the Chart Server as a Trusted Site" link near the top of the Chart List. The link opens a small program that adds the Chart server to the Trusted Sites list in the browser's Internet Options security settings.

Only users with DISPLAY TRUSTED SITES LINK in their responsibilities will see the trusted sites link. For other users, the system administrator can choose to either leave the browser settings unchanged or update them manually.

How to Add the Server as a Trusted Site

1. Open the Chart List by clicking the Charts icon on your home page.
2. Click the Add Chart Server as a Trusted Site link.

If you have the appropriate responsibilities in your User Profile, the link displays near the top of the Charts list, below the Search button.

When you click the link, a file download dialog box opens asking if you want to open or save the file AddTrustedSite.hta.

3. Click the Open button.

The program runs and displays a message saying the chart server has been added to your trusted sites.

4. Click the OK button.

The Charts List displays and you can open charts without encountering warning messages about accessing data on another domain.

Troubleshooting

When trying to display a detailed chart, Internet Explorer may display the message: "Data Access Pages has detected that your IE security settings will not allow you to access data from a site considered to be insecure". This message may display even though the SIA server has been added as a Trusted Site within the Internet Explorer security settings. There is an additional security setting that may prevent access to the data that is used to display the chart. To avoid this error, open Internet Explorer and select Tools > Internet Options > Security > Local Intranet. Click the "Custom Level..." button and scroll down to the "Miscellaneous" section. Set the "Access data sources across domains" option to either "Prompt" or "Enable". If this option is set to "Disable", the chart data will not be available.

Maximum Number of Chart Records

It is possible for chart processing to exceed available resources depending on available memory. The system is configured at installation to stop chart processing if the available memory falls below a preset level. If this condition occurs frequently, you can change the setting of the maxChartRecords option in the appl.xml configuration file.

Disabling Thumbnails

Installation parameters can be set so that chart thumbnails are not displayed on metrics pages or in the charts views. In the Installation Parameters module, set the CHART THUMBMAIL GENERATION value to ON or OFF to control the display of thumbnails.

Available Charts

The following charts are currently delivered with the application:

S_CHT122 - Actual Cost to Planning Estimate - A comparison of Actual Cost to Planning Estimates measured as a percent accuracy for closed work orders. Actual and revised estimates are compared against actual cost incurred. Time units and time basis are defined in the Chart and Metric Setting business rule

S_CHT123 - Planning Accuracy - The number of closed work orders where the ratio of actual cost to the original and revised estimates is within a defined variance. Variance, time units and time basis are defined in the Chart and Metrics Settings business rule.

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_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.

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. There are also other filtering options available in the Chart Field List.

S_CHT145 - Emergency Work Orders - The number of Emergency Work Orders created during the current year and the previous year. An emergency Work Order is a Work Order with work 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_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.

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 equals 'Y'. 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 Safety Equipment 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 Preventive Maintenance 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 Preventive Maintenance 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 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.

Please contact Oracle Utilities Work and Asset Management for information on adding additional charts.

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_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_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_CHT136 - 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.

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.

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.

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.

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.

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.

Graphs

While the Oracle Utilities Work and Asset Management charts functionality requires Microsoft Excel, graphs allow you to represent information visually without relying on the Excel product. Please refer to the User Guide section for the Graphs Administration module, or the Home Page chapter on the Graph Viewer for more information.

Chapter 34

Metrics Administration

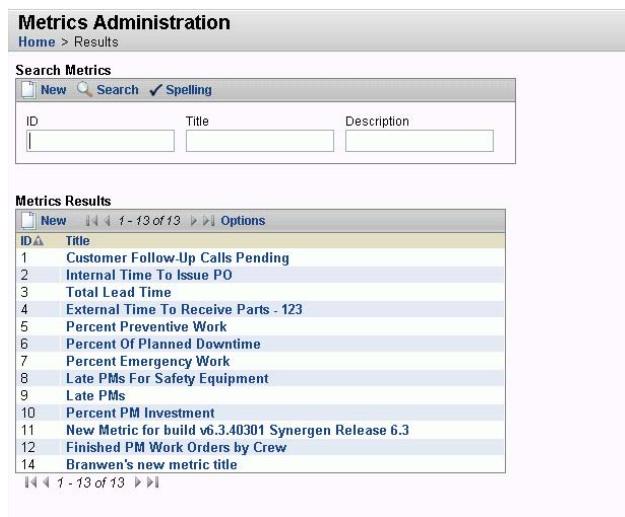
Metrics define basic performance indicators based on SQL queries or stored procedures. Filtered Metrics are based on metrics, but define more specific indicators of your organization's performance measured against specific criteria and goals. Use the Metrics Administration module to review, edit, add, or delete these metrics and filtered metrics.

In addition to showing an indicator's current value (for example, the number of customer follow up calls pending) metrics can show the change since the last reading, whether that change reflects a favorable or unfavorable trend, and whether the performance meets the goals set by your organization. Filtered metrics can also use filter settings to capture more specific performance information.

Only filtered metrics appear on the listing of metrics that are available to be added to the home page. Users must have the appropriate metric responsibilities set in their User Profile, as well as have added the Metric component to their home page.

Metrics Administration Records

Open the Metrics Administration module to open the Metrics results list - a listing of all the metrics that are currently available.



The screenshot shows the 'Metrics Administration' interface. At the top, there is a search bar with fields for 'New', 'Search', and 'Spelling'. Below the search bar is a table with columns 'ID', 'Title', and 'Description'. The table contains 14 rows of metric data. The 'Title' column for each row is as follows:

ID	Title	Description
1	Customer Follow-Up Calls Pending	
2	Internal Time To Issue PO	
3	Total Lead Time	
4	External Time To Receive Parts - 123	
5	Percent Preventive Work	
6	Percent Of Planned Downtime	
7	Percent Emergency Work	
8	Late PMs For Safety Equipment	
9	Late PMs	
10	Percent PM Investment	
11	New Metric for build v6.3.40301 Synergen Release 6.3	
12	Finished PM Work Orders by Crew	
14	Branwen's new metric title	

Metrics Results

Select a metric from this list to open the Metric page where you can review a description of the metric, including any applied filters and associated filtered metrics. You can edit the existing metric, create a filtered metric, manage filters, or delete the metric (if you have the authority) from this page.

The screenshot shows the 'Metric 1' page with the following details:

- Metric 1** (Title of the page)
- Home > Results > Data** (Navigation path)
- Metric 1** (Section title)
- Actions:** Delete, New, Save, Spelling
- Metric ID:** 1
- Title:** Customer Follow-Up Calls Pending
- Description:** 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.
- Query:** (Empty text area)
- Stored Procedure:** sdbp_metric_cust_follow_calls
- Toolbar:** Back, Forward, 1 of 13, Next
- Filters:** Remove Checked Filters, New, 5 of 5
 - Filter Name
 - SA_SERVICE_REQUEST.AREA
 - SA_SERVICE_REQUEST.DEPARTMENT
 - SA_SERVICE_REQUEST.PLANT
 - SA_SERVICE_REQUEST.PRO...
 - SA_SERVICE_REQUEST.SER...
- Filtered Metrics:** Remove Checked Filtered Metrics, New
 - No data to display

Metric Page

How to Create a Metric

1. Open the Metric results page.

You can open the Metric results page by selecting Metrics Administration from the Administration menu or from the App Map.

2. Click the New icon on the Search Metrics toolbar.

The system opens the Create Metric page where you can enter the basic descriptive information for a new metric.

The screenshot shows the 'Metric' page with the following fields:

- Metric** (Section title)
- Home > Results > Data** (Navigation path)
- Metric** (Section title)
- Actions:** Save, Cancel, Spelling
- Metric ID:** (Text input field)
- Title:** (Text input field, highlighted with yellow)
- Description:** (Text area)
- Query:** (Text area)
- Stored Procedure:** (Text area)

Create New Metric

3. Enter a Title and Description.

4. Enter the SQL query or stored procedure required for the metric.

Your contact at Oracle Utilities Work and Asset Management can assist you with identifying the correct stored procedures and SQL queries.

5. Click Save.

6. Click the Results link on the navigation bar to return to Metric results.

You can now click the name of the new metric to add filters and continue building filtered metrics.

Managing Filters

The filters associated with a metric identify the data to be included in, or excluded from, the data set.

The screenshot shows the 'Metric 10' administration screen. The main panel displays the metric's ID (10), title ('Percent PM Investment'), description ('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'), query (1), and stored procedure ('sdbp_metric_pct_pm_investment'). Below this, the 'Filters' and 'Filtered Metrics' sections are visible. The 'Filters' section shows three filter names: 'SA_WORK_ORDER.AREA', 'SA_WORK_ORDER.DEPARTMENT', and 'SA_WORK_ORDER.PLANT'. The 'Filtered Metrics' section shows one filtered metric: 'S_METRIC22 Percent PM for the RJB repair facility'.

Metric Filters

Filter Name

The Filter Name specifies a Form and Column where the data is located. The format used is table name.column name. For example, the filter names for the Percent PM Investment metric include:

- SA_WORK_ORDER.AREA
- SA_WORK_ORDER.DEPARTMENT
- SA_WORK_ORDER.PLANT

You can locate the needed table name and column by selecting Help and About Item from the menu bar while in the module and with the cursor in the field that you want to identify. The system opens a screen that identifies the Base Table name and the Item Name (column).

To add a filter, enter the form.column in the Filter Name box and click the Save button. The new filter appears in the list of filters and is available to all filtered metrics based on the metric.

Creating Filtered Metrics

Filtered Metrics are individual performance measures based on existing metrics, but with additional goal and trend information and with filters set to capture a subset of data.

For example, your organization might want to use the Percent PM Investment metric to measure the performance in three different departments. To do so, you will need to establish three filtered metrics, each identical except for having the SA_WORK_ORDER.DEPARTMENT filter set to identify a different department. Each of the three filtered metrics can also have individual "expected values", reflecting differing goals for the three departments.

You can either create filtered metrics for your users or grant them the authorization to access the Metrics Administration module so that they can create filtered metrics themselves. Filtered metrics must be added to the user's responsibilities before they can be selected for addition to the user's home page. General metrics can not be added to the home page. Even if you leave the metric as is, without applying any filters, you must still create a filtered metric in name only, so that the metric becomes available to users.

Filtered metrics are plant specific. While users can only access filtered metrics created in the plant they are currently using, the metrics can return information from another plant if they contain filters set for another plant and the user has access to that plant.

Filtered Metric Responsibilities

As an alternative to adding responsibilities for the filtered metric in the Responsibility module, System Administrators can select the Filtered Metric and then navigate to the lower section of the screen to manage Responsibilities for individual filtered metrics. To add a responsibility, simply click Add Responsibility then select the Responsibility ID from the list of values. Users with that responsibility will then have access to the filtered metric.

How to Create a Filtered Metric

1. Open the Metrics results page.

You can open the Metrics results by selecting Metrics Administration from the Administration menu or from the Ap Map.

2. Click the metric to use as a template for the new filtered metric.

The system opens the Metrics Administration page for the selected metric.

3. Click the New icon on the Filtered Metric toolbar.

The system opens the Create Filtered Metric page.

4. Enter a Title and Description for the new filtered metric.

5. Select the Desired Trend from the drop-down list.

6. Enter a Baseline value and an Expected value for the filtered metric.

The Baseline value represents an starting value for the filtered metric. The Expected value represents the goal that you want to set for the filtered metric.

7. Select a related chart, if applicable.

8. Click the Save icon on the Filtered Metric toolbar.

The system opens new fields in the lower portion of the window where you can set the filters.

Metric 10 - Filtered Metric 26
 Home > Results > Data > Group Data

Filtered Metric 26

<input type="button" value="Delete"/>	<input type="button" value="New"/>	<input type="button" value="Save"/>	<input checked="" type="button" value="Spelling"/>	1 of 1												
Plant: 01 Title: Percent PM Investment in the RJB Repair Facility Description: Desired Trend: Upward Baseline Value: 10 Expected Value: 15 Previous Value: Current Value: 8 Related Chart:																
<input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3 of 1"/> <input type="button" value="4"/>																
Existing Filters <input checked="" type="button" value="Restore Defaults"/> <input type="button" value="Save"/> 3 of 3 <table border="1"> <thead> <tr> <th>Filter Name</th> <th>Filter Operator</th> <th>Filter Value</th> </tr> </thead> <tbody> <tr> <td>SA_WORK_ORDER.AREA</td> <td><input type="button" value="▼"/></td> <td></td> </tr> <tr> <td>SA_WORK_ORDER.DEPARTMENT</td> <td><input type="button" value="▼"/></td> <td></td> </tr> <tr> <td>SA_WORK_ORDER.PLANT</td> <td><input type="button" value="▼"/></td> <td></td> </tr> </tbody> </table>					Filter Name	Filter Operator	Filter Value	SA_WORK_ORDER.AREA	<input type="button" value="▼"/>		SA_WORK_ORDER.DEPARTMENT	<input type="button" value="▼"/>		SA_WORK_ORDER.PLANT	<input type="button" value="▼"/>	
Filter Name	Filter Operator	Filter Value														
SA_WORK_ORDER.AREA	<input type="button" value="▼"/>															
SA_WORK_ORDER.DEPARTMENT	<input type="button" value="▼"/>															
SA_WORK_ORDER.PLANT	<input type="button" value="▼"/>															

You must select both a Filter Operator and a Filter Value or the system will not allow you to save the filter.

9. Set the filter operators and values according to the following field descriptions:

Filter Operator - specifies the data relationship required by the filter. Select one of the operators from the drop-down list.

Filter Value - specifies the actual data value. If no value is specified, the filter does not influence the value the metric returns.

It is not necessary to type single quote marks around the Filter Value as the system adds these when the record is saved.

10. Click the Save icon on the Existing Filters toolbar.

The new filtered metric is listed under Filtered Metrics on the Metric page. Before users can add this filtered metric to their home page, it must be added to their responsibilities.

How to Add Filtered Metrics to a Responsibility

1. Open the appropriate Responsibility record.
2. Select Filtered Metrics from the Type list.

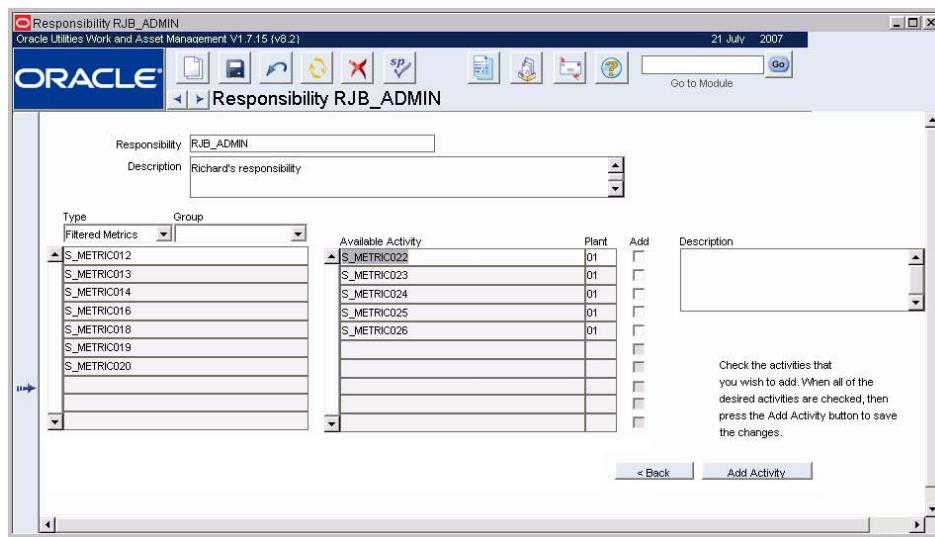
The list of filtered metrics currently assigned to the Responsibility opens. This list shows all assigned filtered metrics, regardless of the current plant or the plant for which the filtered metric was created. From their home page, however, users can only select filtered metrics for their current plant.

3. Click the Add Activity button.

The Available Activity list opens showing the Filtered Metrics not currently assigned to the Responsibility.

4. Check the Add box for the Filtered Metrics you want to add.

You can review the description of the metric group to be sure you are selecting the correct group.



5. Click the **Add Activity** button.
6. Click the **Back** button.

The filtered metrics you added appear on the list with the Ind box checked. Depending on their current plant, users can now add the listed filtered metrics to their home page.

Customizing Metrics

It is also possible to customize how individual metrics work on the home page. For example, users can set the desired high or low value for the metric as well as how frequently they want to receive alerts if these values are exceeded. If the metric has an associated chart, the metric can also be customized to display the chart on the home page.

When a metric is customized in this way, the values entered only change how the metric works for the individual. The changes do not impact other users.

When a metric is customized in this way, the values entered only change how the metric works for the individual. The changes do not impact other users. Only persons with access to the Metrics Administration module can set new goals for the metric and make other system-wide changes.

How to Change Metric Alerts

1. Click the **Edit** link next to the Metric name on the home page.
- The My Metric page for the selected metric opens.

The information in the upper part of the page is descriptive and cannot be modified. The Filtered Metric section shows the settings supplied when the metric was created, including whether the desired trend is up or down and what the expected value is. The Chart Title and Chart ID fields identify any chart associated with the metric. Only the information in the Metric Preference section can be changed.

2. Check the Send Alert When boxes and enter a corresponding value.

The system can be set to send an alert either when the value exceeds or falls below the value selected. Check both boxes to have an alert sent in either case. For example, you might want an alert sent when a minimum safety criteria is in jeopardy or when an important departmental goal is achieved.

3. Enter the number of days between alerts.

4. Click the Save button.

The system records the set preferences and returns to the home page.

The number entered here should reflect both how many alerts the system should generate as well as the frequency of the event measured by the metric. For example, if the metric is recording a value that only changes monthly, there is no need to receive alerts every 5 days.

How to Display a Chart Associated with a Metric

1. Open the My Metric page for a metric that has an associated chart.

Metrics that appear in bold text on the home page have associated charts.

2. Check the Display Thumbnail Image box.

3. Click the Save button.

Now the home page will show the associated chart below the metric. The example below displays the charts for both Customer Follow Up Calls and Late PMs.

Chapter 35

Currency Exchange Rates

The Currency Exchange Rates module allows for the creation of multiple exchange rates per currency code. When the exchange rate is updated, the new effective date is stored and the previous rates and effective dates are kept as a log. This functionality provides an audit trail of prior exchange rates used for procurement.

Currency Exchange Rates Records

Currency codes and exchange rates are entered on purchasing documents to calculate the appropriate procurement costs. The default code is set in the [Plant](#) module. This code is displayed as the base currency in the upper right corner of the Currency module record.

Selecting Exchange Rates from the views list simply moves the cursor from the top portion of the record to the list of exchange rates in the bottom section.

Currency Exchange Rates record

The following fields are included:

Currency - Create unique currency codes as appropriate to your business needs.

Effective Date, Exchange Rate, and Comments - The table displays the rate from a foreign currency to your base currency and from your base currency to the foreign currency. Exchange Rates can be entered manually with comments as they change. When you enter one exchange rate, the system provides the other rate. The system also defaults the current date for the Effective Date, but this can be changed if necessary.

How to Set the Default Currency Code to Enter on Purchasing Documents

To indicate which code should be defaulted on purchasing records:

1. Define the appropriate code in the Currency Exchange rates module.
2. Open the Plant module in the Enterprise subsystem.
3. Enter the default code in the Local Currency field.
4. Click Save.

Chapter 36

In House

You can interface your own Developer/2000 based applications by adding a custom menu called directly from the application's primary menu. Simply develop your own menu and identify it in the Rule PRIMARY MENU. For details about the Rule, please refer to the Rules Definition and Setup Users Guide.

Creating Your Custom Menu

Included as a part of the system is the menu form CUSTOM.MMB. You can use this as a template for creating your own Oracle Developer/2000 Forms 4.5 menu to call your forms based applications. The form contains two sub-menus: FILE and CUSTOM_MENU.

The FILE menu contains one item: "PRIMARY_MENU". This item is a Plain PL/SQL menu item, with the label "Primary Menu", containing the following code:

```
Replace_Menu('main');  
which returns the user to primary menu.
```

The CUSTOM_MENU menu contains one item: "MY_FORM". This is a sample Plain PL/SQL menu set up to call your own form. It contains the following code:

```
Open_Form('my_form', ACTIVATE, SESSION);  
"my_form" can be replaced by whatever executable (.mmx) filename was created for  
your form.
```

Important Note: Whether you use the custom menu template or not, it is very important that when calling your own forms, you use the SESSION parameter. If not, transaction processing will not work correctly between the system and your custom applications.

Identifying the Menu

To have the system recognize and provide access to your custom menu, you need to set up the following Business Rule:

RULE ID:	PRIMARY MENU
KEY NAME:	CUSTOM MENU
KEY VALUE 1:	The form name of the menu (without the .mmx), e.g. MY_MENU
KEY VALUE 2:	The label to be seen in the application, e.g. My Menu

This rule is checked only when the application starts up, so you must exit and restart the system to see changes to the Business Rule take effect.

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